



An assessment of media
development challenges and
opportunities in Myanmar:

Change is in the air

ASSESSMENT

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ims

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Abbreviations

AM	Amplified Modulation
ASEAN	Association of South East Asian Nations
ASSK	Aung San Suu Kyi
BBC	British Broadcasting Corporation
BSP	Myanmar Socialist Program Party
DFID	Department for International Development
DVDs	Digital Video Discs
FM	Frequency Modulation
HIV/AIDS	Human Immunodeficiency Virus / Acquired Immune Deficiency Syndrome
ICMMF	Indo-China Media Memorial Foundation
IMS	International Media Support
INGOs	International Non-Governmental Organizations
KNU	Karen National Union
MMRD	Myanmar Marketing Research & Development
NGOs	Non-Governmental Organizations
NLD	National League for Democracy
RSF	Reporters Sans Frontiers
SIDA	Swedish International Development Agency
SLORC	State Law and Order Restoration Council
SPDC	State Peace and Development Council
TOT	Training of Trainers
TV	Television
VOA	Voice of America
UK	United Kingdom
UN	United Nations
UNDP	United Nations Development Programme
USAID	United States Agency for International Development
VCDs	Video Compact Discs

Executive summary

This report presents the findings of a media environment assessment in Myanmar within the context of the present socio-political and economic developments in the country and its emerging media landscape.

At the request of the Norwegian, Swedish and subsequently Danish Embassies in Bangkok, International Media Support (IMS) conducted an assessment of the current media environment inside Myanmar during two missions between July and November 2011. The assessment was motivated by a democratic reform process initiated in March 2011 when the 50-year reign of the military was replaced by a civilian government. A number of small steps taken so far by the Myanmar government in relation to media have provided an opening to expand the country's freedom of expression space. The objective of the assessment was thus to identify opportunities and provide a set of recommendations for potential international interventions on media development within the country for the short and long-term perspective.

Findings from the assessment show that the country is undergoing a rapid process of reform on many fronts after 50 years of military rule. According to observers, the changes, which relate to economic, social and political reform, are genuine although some also view the government's initiatives with skepticism, unsure of the underlying agenda of the members of the former military government that now make up the new civilian leadership. The challenges of reforming a country which has been under authoritarian rule for 50 years and is home to the longest running ethnic conflict in Asia are many. In light of this, the steps taken so far towards democratic reform could be described as major leaps on the path towards a more democratic society.

The political opposition is now permitted to engage in political activities with Aung San Suu Kyi who will stand in the upcoming by-elections. Aung San Suu Kyi is also actively engaging with the regime around the socio-economic development in the country. She was invited to attend a vital economic forum in the capital Naypyitaw and also held discussions with President Sein, followed by several meetings with senior ministers. Parliament is debating new laws that could bring novel democratic changes to the country. These proceedings are now also reported in the media and exiled political activists have been invited to return. Web sites once blocked such as YouTube, Google, Facebook, Bangkok Post and those of exiled media (Mizzima, Irrawady, DVB) are now accessible from within Myanmar.

The voice of the political opposition is being granted more space in the media, and publications are increasingly able to openly discuss government policies. Even the publications allied with or owned by the government are following this trend. The government has begun holding press conferences at which media representatives can raise questions. This newfound situation of more openness and a relaxation of censorship poses a challenge for media in Myanmar and the question is whether the media is able to fulfill its role as society's watchdog with no experience to draw on or knowledge of professional ethical standards.

The ongoing reforms have meant a relaxation of the government's strict censorship of media since mid-June 2011. A further easing of media censorship is expected with the introduction of new media laws, although these are

viewed with some concern by media practitioners and civil society. Essentially, non-news/current affairs publications are no longer required to submit their advance copies to the Press Scrutiny Board. There is, however, still a monitoring and regulatory system in place, which does not include judiciary processes, but only a penal system effectuated through steep fines.

According to observers with whom the IMS assessment team spoke, it is obvious that these changes are faced with resistance from within the government which is divided between reformists and hardliners. In a debate in Parliament in late 2011 on media freedom, the Information Minister argued against a relaxation of restrictions. He was subsequently interrupted by the facilitator who claimed his speaking time was up. However, the mere fact that a relaxation of censorship is being debated in Parliament is a major development.

On the economic front, significant developments are now occurring. From 2010 – July 2011, at least six multinational companies have commenced operations in Myanmar. India and China are competing for the position as a dominant player in the market of approximately 60 million people. Between April and July 2011 three telecommunication companies began operations in the country, showing the first signs of a potential major boom in the ailing telecommunication industry, as well as in the IT industry as a whole.

One push factor behind the economic reforms is Myanmar's interest in becoming fully integrated in ASEAN for which Myanmar was granted the ASEAN chairmanship for 2014 during an ASEAN meeting in Bali in late 2011. An equally strong motivation for change lies in the fact that Myanmar battles with severe socio-economic issues and a spell of natural disasters, have all contributed to a drive towards political change and the road map to democracy with the recent elections.

Myanmar's media landscape

IMS' assessment of the media landscape in Myanmar shows that it is slowly opening up after 50 years of repression. It is currently dominated by young, untrained journalists with an average age of 25. The relaxation of pre-publication censorship on a number of media has meant that the responsibility of monitoring content now lies with the editors rather than the censors. With little or no experience, responsible, managing editorial control could pose a challenge for the many young, untrained journalists and editors in Myanmar.

Although there are no official statistics on the number of journalists in Myanmar, there are estimated to be around 1000. The number of media outlets is increasing with at least 248 weeklies being published in Myanmar of which 138 are news and current affairs publications. The latest addition at the time of writing was 'Naypyitaw Times' which is published by the government. While at present all six daily newspapers are owned and controlled by the state, there is talk of launching the country's first independent daily newspaper in Yangon.

Radio is the most preferred source of information for the rural population, although it lacks capacity both technically and on the content side. The six semi-state owned FM/AM stations are popular and focus on 'non-controversial' content such as music and entertainment from private producers. Almost every citizen in Myanmar listens to Voice of America or BBC for daily news and current affairs. The ban on these radio channels is being lifted and foreign journalists are now allowed to report from Myanmar.

Although Internet penetration in Myanmar is less than one per cent, new social media such as Facebook and mobile phones are becoming an attractive way for urban youths to communicate and interact socially. The ICT and telecommunication sector is also expected to experience a major boom within the next two years with the arrival of Indian IT companies in the country along with new mobile operators.

Recommendations

Transforming a country emerging from decades of ethnic conflict and military rule is challenging. One of the questions is whether Myanmar is able to steer clear of ethnic conflict and create the democratic and civic institutions necessary to carry forward the reform process. A professional and vigorous media community can both prevent conflict and promote democratic processes and good governance through the automatic functions of disseminating information, furthering awareness and knowledge, promoting participatory and transparent decision-making, and addressing perceived grievances.

The media in Myanmar has never previously functioned as the Fourth Estate of a democracy. Now it finds itself at the centre of democratic reform. The new generation of journalists have little experience or knowledge of how media should work in an emerging democracy. Their knowledge of professional ethical standards is basic. Both technical and issue-based knowledge requires rapid, but systematic enhancement. Although the legal regime on censorship has been relaxed, the overall media policy and legal environment is characterised by control and is not geared to support political reform.

Thus, building on the findings of the IMS assessment of the Myanmar media and in light of the challenges that media are confronted with within a still tightly controlled media environment, the underlining theme of the recommendations is to provide the support for media and civil society in Myanmar that in turn will enable these institutions to support the ongoing change process in the country. The media's role contributing to the current expansion of democratic space is essential to ensuring that the reforms underway will benefit the population as a whole and not just the power-holding elite.

Looking ahead, time is also ripe for initiating the creation of a more mature media environment with the aim of enhancing professional standards that will enable media to become an institutional pillar of democracy. The process could start by identifying individuals, developing their capacity, assisting them in institution building, expanding their networks and building strategic partnerships. In the longer term, this would form the foundation of media development activities.

IMS recommends that support to the Myanmar media environment is approached through three broad focus areas:

- Strengthening national capacity to reform media-related policies and legal frameworks and to engage in democratic transition
- Building the foundation for media and journalism to professionalise
- Expanding access and outreach of media content to rural areas

The changing political and economic context is giving way to emerging needs and new opportunities for addressing media development inside Myanmar. The approach requires flexibility and also has implications for the current support provided to exile Myanmar media. Hence, close coordination with international partners and donors will be essential to the success of sustainable and targeted support of Myanmar's media.

1 Introduction

This report is the result of two assessment missions and post-mission consultations undertaken by International Media Support (IMS) since June 2011, initially at the request of the Norwegian Embassy and Sida in Bangkok, Thailand. The aim of the assessment is to identify the challenges and opportunities involved in commencing assistance aimed at maturing and professionalising independent media institutions and journalism inside Myanmar in the wake of the April 2011 shift from military to civilian rule. In the months following the shift to civilian leadership in Myanmar, there have been positive signs of change in the political approach of the new government. The first assessment was carried out by IMS consultants Ranga Kalansooriya and Adnan Rehmat during a week-long field mission to Yangon in July 2011 and it was followed up with another mission by IMS Head of Asia and Pacific department Lars Bestle and Ranga Kalansooriya in November of the same year.

With the dissolving of the military regime and the State Peace and Development Council (SPDC) in March 2011 and the installment of a new, nominally civilian, president-led government following the elections in November 2010, Myanmar is at a critical juncture. While the political changes witnessed within the country are widely seen as a move to attract much needed foreign investment¹ the changes also have potential implications for a future international engagement in Myanmar. Severe restrictions and censorship over the past decades have hindered the development of independent and free media inside Myanmar. As a consequence of this, exiled Myanmarese media communities that report on the situation in the country have flourished outside the country's borders.

In spite of the restrictions imposed by the former military government, a number of private media outlets do exist in Myanmar. These include both electronic and print weekly media. Though these media do not cover political issues, they instead focus on health, sports and leisure, fashion, celebrities, social issues, music, etc. No privately-owned, daily media exist in the country. In recent months, however, the strict censorship practices have been relaxed and pre-censorship on some selected media was lifted in June 2011.

For Norway and Sida/Sweden, the guiding principles for international engagement are support and respect for human rights and the promotion of fundamental freedoms. This rights-based perspective is mainstreamed throughout their development support. Norway and Sida/Sweden focus globally on the promotion of freedom of media, support to independent media, training of journalists, as well as other ways to support freedom of expression. IMS' assessment of Myanmar's media was driven by this focus.

The objective of the first media assessment mission was to evaluate the possibility, through Norwegian and Swedish support, of strengthening media institutions and journalism, and improving media and press freedom by promoting media professionalism, independence and accountability in Myanmar. The second mission was conducted to follow up on the findings of the first mission and to monitor any further developments and changes in the situation of the media.

¹ Reuters, 30 March 2011: 'Myanmar Junta makes way for Civilian Government'

In preparation for the mission, the IMS mission members consulted existing reports on media in Myanmar by international NGOs for background



Photo: Adnan Rehmat/Intermedia

information. The team identified the key media actors in Myanmar, their level of independence, looked into existing domestic journalism training initiatives, and carried out a mapping of international organisations, UN agencies and other donors engaged in the Myanmar media sector. The mission members also analysed the capacity of the media actors, including that of non-governmental providers of journalism training in Myanmar and identified the main challenges and potential for improving the media situation.

The first assessment mission to Myanmar, which was carried out by a two-member IMS consultant team and aided by an experienced local coordinator based in Yangon, included detailed meetings with around 20 key players in the various tiers of media including both public and underground journalists, media activists, trainers, development specialists with backgrounds in TV, radio, print and online media and media practitioners working for both in-country and exile media. All meetings were conducted face to face in both work and private environments and documented in writing. In order to protect the identities of those who met with the assessment team, no names have been disclosed in this report. The names are known to IMS.

The assessment covers radio, TV, print and online media and makes concrete recommendations for international community support to the media sector in Myanmar. The assessment has produced concrete recommendations to Norway and Sweden for a possible engagement and contribution to media development in Myanmar that complements ongoing activities supported by other donors, mainly through partnership mechanisms. The interventions proposed in the assessment and which focus on long-term capacity building, links to civil society, training, and media institution building, are outlined in the last chapter.

The mission team worked in collaboration with the Norwegian Embassy, Sida in the Swedish Embassy in Bangkok, local and regional media organisations, international and local NGOs and the donors and UN agencies engaged in the Myanmar media sector. Preliminary findings were presented to the Norwegian Embassy and Sida in Bangkok on 2 Sept 2011². The feedback received on this provided valuable input into the process of drafting this assessment report.

² Present at the meeting was the IMS Asia Regional Advisor who conducted the Assessment in Myanmar, as well as the IMS Head of Asia Programmes

2 The changing political context in Myanmar

2.1 Socio-political background

Myanmar is an important country in Asia with its rich natural resources and strategic geographical location connecting South Asia with Southeast Asia and bordering Bangladesh, India, China, Thailand, and Laos. It has a population of around 60 million, and spans an area of about 676,000 sq km. The country is home to over 135 ethnic groups of which nearly 90 per cent are Buddhists. Myanmar has a history of continuous insurgency activity along its borders since it gained its independence in 1948. Myanmar's population is characterised by ethnic diversity. The government has recognised some 135 distinct ethnic groups and the country is home to many languages including Burmese, Karen, Shan, Kachin, Rakhine, Mon, Chin and Chinese. The Bamar is the largest ethnic group in Myanmar constituting an estimated 68 per cent of the population while around 10 per cent of the population is Shan, 7 per cent are Kayin and the Rakhine people constitute 4 per cent. Myanmarese Chinese make up approximately 3 per cent of the population.

The ethnically diverse composition of Myanmar's population has been the source of one of Asia's – if not the world's – longest ethnic-based civil wars since the country's independence in 1948. The continuous ethnic clashes and ruthless response by the military regime has led to at least a couple of million people fleeing the country mainly to the neighbouring countries Thailand, Bangladesh and India, according to UNHCR figures.

Since its independence, Myanmar has only enjoyed 12 years of democracy. With the coup led by General Ne Win in 1962, the country fell under strict military control curtailing all democratic values and structures including media. During this period, Myanmar became one of the world's most impoverished countries. Many pro-democratic movements were suppressed and journalists were brutally punished and jailed.

There have been a number of milestones during the junta regime, but those known to be the most significant are the 1988 uprisings, the 1990 elections, the 2007 Saffron Revolution and Cyclone Nargis in 2008.

Although the National League for Democracy (NLD) led by Aung San Suu Kyi clearly won the polls in the 1990 elections, the Junta refused to step down. This opened the eyes of the international community and led it to increase pressure on the Junta regime. Many believe that international pressure played a key role in altering the military's grip on Myanmar, while some disagree with this argument.

The Saffron Revolution led by the country's Buddhist clergy following the government's decision to remove fuel subsidies also exposed the ruthless nature of the Junta to the outside world.

The devastating Cyclone Nargis that hit Myanmar in the first week of May 2008. Although the cyclone is estimated to have killed approximately 140,000 people³, it also opened a door into the country for the international community. Initially, the Junta resisted international assistance, but had to succumb to allowing foreign intervention due to the sheer scale of the disaster. "This was the biggest scale of entry of foreigners and international

³ According to UN figures Cyclone Nargis killed 140,000 and affected the lives of 2.4 million people.

relief actors into the country and it has had an impressive impact on how both the locals, including the government, perceive outsiders and vice versa", says a UN official in Yangon.

This development has slowly helped open up the society and increased trade and tourism in relative terms. It has also created a new culture of non-governmental groups and a prototype of civil society in the country. Finally, this has also been an indirect opening for potential political change in the country as well.

In 2003 the Junta regime laid out its seven-step roadmap to democracy which has been followed with military precision. Due to the fact that a new constitution was written, elections have now been held. Flawed as they may have been, the President has embarked on an ambitious reform agenda, and parliament is starting to exercise the power that it has been given under the constitution. Political changes that only few dared to hope for a year ago are now visible.

The first signs of change came on 7 February 2008 with the SPDC's announcement of a referendum for the new Constitution which was held on 10 May 2008 and was followed by general elections on 7 November 2010. The Junta promised a "discipline-flourishing democracy" for the country with reference to freedom of expression, assembly, description of functions of the legislative, the judiciary, the executive and establishment of democratic institutions, etc. The official name of the country changed to "Republic of the Union of Myanmar", replacing the old "Union of Myanmar".

Although the November 2010 elections were carried out peacefully, some irregularities were reported at polling stations. Aung San Suu Kyi's NLD boycotted the elections which had an official turnout of 77 per cent. On 9 November 2010, the ruling Junta stated that the Union Solidarity and Development Party won 76 per cent of the votes. This claim was widely disputed by pro-democracy opposition groups, who asserted that the military regime engaged in rampant fraud to achieve its result. However, several democratic parties chose to run for elections, including a breakaway fraction of the NLD.

2.2 Developments since the withdrawal of the military regime

With the military's withdrawal from government on 30 March 2011, the elected civilian regime is making an attempt to introduce reforms as stated in the new Constitution. With the release of NLD Leader Aung San Suu Kyi from house-arrest in November 2010 following the elections, steps have been taken in the country to improve its image, albeit viewed with suspicion by many outside observers.

The new reforms have opened up room for the "Lady" (Aung San Suu Kyi) to engage in political activities and given due recognition to the parliamentary process. She is now ready to run for by-elections due early next year through her own party NLD which re-entered politics in November 2011. The reforms have also allowed media to discuss formerly taboo subjects such as human rights, democratisation, corruption, good governance, environmental concerns (including the controversial Myitsone dam), poverty, livelihood issues, and foreign exchange rate discrepancies. The media now dedicates more space to Aung San Suu Kyi, a significant development in Myanmar within the last few months. President Thein Sein invited Suu Kyi for official talks in mid August and her office announced that talks were held in a friendly atmosphere. Both posed for a joint photograph with the backdrop of independence hero

General Aung San, Aung San Suu Kyi's father, which provided a sound political message to the masses. Upon her return to Yangon, Aung San Suu Kyi stated that she was "happy and satisfied" with her meeting with the President, as well as her meetings with members of his government.

The NLD leader is now free to meet foreign dignitaries and address political rallies. In August 2011, she attended a state-organised economic forum in Myanmar's capital Nay Pyi Taw.

The people of Myanmar are still either cautiously optimistic or skeptical about the recent developments in the country, but it is clear that the new regime is working hard to gain international recognition through the regional grouping Association of South East Asian Nations (ASEAN). The regional grouping decided that Myanmar should take on the chairmanship and host its 2014 summit in Nay Pyi Taw, a measure many international observers see as recognition of ongoing reforms in the country.

But not all is well in Myanmar, especially not where the media sector is concerned. On 7 September 2011, the Myanmar Parliament (Lower House) debated a private member motion by an MP during which Information Minister Kyaw Hsan claimed that: "If press freedom is to be granted with a set of rules protecting the rights of freedom, there would be more disadvantages than advantages. But if opinions are allowed to be expressed within a necessary framework, it would bring advantages to the nation."⁴ The mere fact that these issues are now being debated in the Lower House and are reported on in the press – of course with limitations after 50 years of silence, is remarkable.

Several exiled activists and journalists have already begun returning to Myanmar following President Thein Sein's invitation to do so in mid-August. The government has instructed its embassies to help them to return and encourage them to do so. A few journalists and activists (including a group of politically active comedians) began returning to the country from mid August 2011 without too many problems. One exiled journalist who had been working for western media was stopped at Yangon airport, but released after a brief interrogation. Visa was also granted to a VOA reporter based in Bangkok, who was able to attend the celebration of the "International Day of Democracy" in the capital on 15 September. International news channels such as BBC and Al-Jazeera are now doing stories from Myanmar through open interviews and commentary.

A number of high-profile visits to the country marked the last half of 2011. Barak Obama called Aung San Suu Kyi over the phone on 17 November 2011 and informed her that Secretary of State Hilary Clinton would visit Myanmar the following month. Dozens of European ministers of foreign affairs and special envoys have traveled to Yangon since April 2011 and met with government leaders as well with Aung San Suu Kyi. On 12 September 2011 Myanmar media reported that Aung San Suu Kyi had met with US Special Envoy and Policy Coordinator for Myanmar Derek Mitchell in Rangoon about the possibility of providing development assistance for education and health. Derek Mitchell expressed optimism about the current political developments in the country⁵. Mitchell, who was on a five-day visit to Myanmar was appointed to the position on 15 August 2011 in what some believe was a response to the new developments in Myanmar.

4 http://irrawaddy.org/article.php?art_id=22041

5 <http://www.state.gov/eap/rls/rm/2011/09/172321.htm>

Prior to meeting Mitchell, Aung San Suu Kyi also met with EU Commissioner for International Cooperation, Humanitarian Aid and Crisis Response, Kristalina Georgieva, who told media in Thailand that the Myanmar government

had vowed to pursue an end to its decade-long armed conflict with ethnic groups. According to Kristalina Georgieva, the government is to allow for the voluntary repatriation of war refugees, and for international aid groups to be given access to disaster and conflict zones. In a country where the military has tightly controlled and dominated the people for five decades, these small steps could be considered a major leap forward towards democracy.

One of the main concerns of some political analysts is the rapid pace with which these ongoing political developments in Myanmar are taking place. Are the country's socio-political structures mature and strong enough to absorb and sustain these ongoing changes?



Photo: Lars Bestle/IMS

3 The Myanmar media landscape

3.1 The legal environment

Censorship remains the biggest challenge for Myanmar media's legal environment today along with maintaining the relaxations on censorship of media that have been enforced so far. Until June 2011, all Myanmar media had to submit their publications for pre-publication censorship, but these procedures were relaxed for a selected group of journals and magazines (health, children, technology and sports sector publications) which are no longer required to submit their publications for advance approval.

The 1962 Printers and Publishers Registration Act introduced the Press Scrutiny Board, which was established by the then Revolutionary Council and was renamed in April 2005 as the Press Scrutiny and Registration Division. The Press Scrutiny Board has directly impacted on the functionality of media for the past five decades.

The new moves to ease press scrutiny are in line with the country's new 2008 Constitution, which upholds the citizens' freedom of expression⁶. In contrast to this, the scrutiny of so-called Category II journals and magazines (politics, religion, business, education and crime) is carried out according to the 1962 press laws. This indicates a contradiction between the policies of the new civilian regime and the legislations of former legal regimes, which are still in place.

However, almost half the 358 publications that are non-news, non-current affairs and less sensitive have been declared exempt from pre-publication censorship, but they are governed through a pre-deposited fine system in the event of publishing an 'unhealthy' story. Thus, an environment of self-censorship has been created while exempting publications from pre-scrutiny.

Under the new guidelines of June 2011, a Complaint Commission has been established that will conduct post-publication review of published content for any transgression of the Four National Objectives that may adversely affect national solidarity and harmony or defame anyone. The Commission will also entertain complaints from the public or officials about any content.

Myanmar authorities have also jailed journalists, most of whom are bloggers. Currently, over a dozen bloggers/reporters are serving prison sentences of between 7 and 15 years for sharing videos and other material with exile media, as well as putting up blogs or other new media content on the internet. The government takes tough action against these activities in accordance with the Electronic Transaction Law of 2004.

The Official Secrets Act of 1923 (substituted by the Union of Myanmar Adaptation of Laws 1948) is another barrier for media in Myanmar. The journalists who attempt to access simple, non-sensitive information can be subjected to punishment under these laws. Furthermore, a separate censorship board with the task of controlling visual productions was established under the Motion Picture Laws of 1996.

However, there are strong rumors and beliefs among media practitioners in Myanmar that a new set of media laws are being drafted and will be presented to Parliament in early 2012.

⁶ *In accordance with the 2008 Constitution, the Republic of the Union of Myanmar was formed and a modern developed nation is being established. In accordance with Sub-section (A), Section 354, Chapter (8) of the Constitution titled "Citizen, Fundamental Rights and Duties of the Citizens", every citizen shall be at liberty to express and publish freely their convictions and opinions. Sub-section (D) of the same Section also guarantees that every citizen shall be at liberty to develop their language, literature, culture they cherish, religion and custom they prefer. Therefore, in accordance with the Constitution, the present press scrutiny policies should be modified and applied step by step. – From the English translation of the government proclamation of 7 June 2011.*

3.2 Print media

With some 361 weekly journals and monthly magazines (as of November 2011), print media plays a key role in the media landscape of Myanmar. There are six dailies which are all owned and operated by the state, and thus cannot be considered independent media. There are around three new weeklies on the market. The government is also contemplating enlarging its stake in the media by launching its latest news weekly under the editorship of a moderate journalist.

The themes of these journals and magazines vary from politics to children. In the absence of a vibrant independent daily newspaper, the weekly news and current affairs journals play a key role in disseminating vital information, as well as educating the masses, though they carry one-week old news and analysis. However, the sports pages are more dynamic and colorful than the rest of the content in many of the publications.

The new Press Scrutiny and Registration Division (former Press Scrutiny Board PSB) procedures announced on 7 June 2011 exempt publications covering the themes of health, kids, technology and sports from submitting their publications for pre-publication censorship. In November 2011, it further relaxed the procedures by dropping two more categories (crime and education) from the pre scrutiny list. The rest, some 160 publications under the themes of religion and business, are still subjected to advance vetting by the PSRD.

Popularity of daily newspapers in May 2010 (Source: MMRD)

Newspaper	Market share
Myanmar Ahlin	52 %
Kyeimon	42 %
Yadanabon	3 %
Mandalay News	2 %
The New Light of Myanmar	1 %

Popularity of news weeklies in May 2010 (Source: MMRD)

Publication	Market share
First Eleven	24 %
7 Day News	21 %
Weekly Eleven News	19 %
In Arr	13 %
Premier Eleven	10 %

The relatively high sales numbers for dailies reflect a gap in information and a hunger for information, although the sales only account for a third of the circulation figures of weeklies.

The report's comparative analysis of media consumption shows that newspaper (daily) consumption dropped from 10 per cent in 2004 to 7 per cent in

Photo: Lars Bestle/IMS



2008, but grew slightly to 8 per cent in 2010. Monthly magazine consumption likewise saw a drop from 11 per cent in 2004 to 9 per cent in 2008 and to 8 per cent in 2010. Journals (news weeklies), however, saw an increase in consumption from 11 per cent in 2004 to 14 per cent in 2008 and to 16 per cent in 2010.

This data trend reveals a demand for information relating to current affairs. Since only the weeklies provide independent news and information (although still censored by the government), their number of readers is growing. There are also signs that people are switching from family-oriented monthlies and government propaganda-heavy dailies to street-focused weeklies. However, as a percentage, print media has a relatively small audience, but in sheer numbers nearly seven million people use print media for news and information purposes.

The print publications observed by the assessment team in Myanmar carried a box featuring slogans under the headlines of 'People's Desires' and 'Social Objectives'. These were predominantly propaganda slogans of the regime. From 16 August 2011 these daily propaganda slogans were removed from state newspapers. Introduced between 1988 and 2007, these slogans conveyed the regime's "four political, economic and social objectives" in varying versions. "People's desire" included an exhortation to "crush all internal and external destructive elements as the common enemy" as well as criticism of foreign and exile radio stations such as the BBC and Voice of America ("we must not allow ourselves to be swayed by killer broadcasts designed to cause troubles"), and so on.

3.3 Broadcast media

Of the six television channels that can be viewed in Myanmar, one (MRTV4) is privately owned while another (Myanmar International) is a joint venture between the government and one of its allies. The rest (MRTV, MWD, MRTV3 and Channel 5) are run entirely by the state with poor infrastructure and equally poor production quality. However, the exile television broadcaster DVB TV is viewed by many in Myanmar.

TV-viewing by region by the end of 2010⁷ included 74 per cent in Metro Yangon and 64 per cent in Metro Mandalay, 29 per cent in Dry Lands, 42 per cent in Plains, 45 per cent in Delta, 23 per cent in Northwest Hilly Regions, 18 per cent in East Hilly Regions, 8 per cent in West Coast Regions and 38 per cent in South Coast Regions. These statistics indicate that the greater the urbanisation or commercial a region, the more the people consume media.

One development for the past three years has been the sharp drop in number of television viewers and the increase in radio listeners. Radio, mainly the FM channels, is becoming extremely popular in urban and rural populations. The consumption of TV programmes has seen a drop from 57 per cent in 2004 to 36 per cent in 2010. In contrast, consumption of radio, however, saw an increase from 18 per cent in 2004 to 34 per cent in 2010. The dramatic drop in the number of television viewers can be ascribed to the near absence of news and information about politics and business in this state-controlled sector.

Among the 16 radio channels in Myanmar, the state owned Myanmar Radio has the highest rating, perhaps due to its wide-range coverage through an AM operation.⁸ The others are local FM operations⁹ based in major cities and are mostly listened to by urban Myanmar people. The increase in radio listeners generally relates to the presence of more cultural content such as music and youth-focused coverage which attracts young people to radio.

The ownership of these radio stations varies. Almost half the stations are owned by private businessmen close to the regime who focus on low-cost content generation and a high volume of advertising. There are several private production houses that produce content for these private FM stations on non-political social issues. These production houses, mainly radio stations, lack basic resources, but are eager to produce programmes that bring civil society actors and opinion makers onto a common platform. On average, radio content production is not a costly affair, but at Burmese standards, it is still not affordable.

Many urban Myanmar depend on foreign news channels such as Voice of America (VOA) and BBC (Burma) to receive the news of the day. Listeners glued to small pocket radio sets in Yangon's streets is a common sight during the VOA/BBC bulletins. "I would never miss VOA news of the day," said a taxi driver told the assessment team in Yangon in June 2011.

"What is the latest news?" the assessment team asked a pavement shop vendor near Shwedagon Pagoda in Yangon who sat with his pocket radio, perhaps listening to BBC Burmese News. "The Lady is still safe in Bagaan,"¹⁰ he yelled at us.

Radio is the most preferred source of information for the millions of rural people in the country. But these radio stations are also underdeveloped in terms of infrastructure, capacity and content. This is in stark contrast to the potential that radio has to fill the information vacuum in rural areas.

An interesting feature in the television sector is the popularity of VCDs and DVDs. In MMRD's Demographic and Media Consumption Survey for 2010, of a base population of 42.1 million in Myanmar, 71 per cent (29.9m population) of those surveyed consume videos, VCDs and DVDs.¹¹ These electronic products mainly contain entertainment programmes, but also include current affairs documentaries to a lesser extent. These statistics indicate that the content most consumed is not news, but entertainment brought to people through rented CDs and DVDs, as well as TV channels with only state-produced news.

7 According to MMRD

8 Overall, the most popular radio stations in terms of volume of listeners, including both Burmese and non-Burmese, are as follows: Myanmar Radio (23 per cent), Padaukmyay (5 per cent), Shwe FM (4 per cent), Mandalay FM (4 per cent), Ruby FM (2 per cent), BBC (2 per cent), Pyinsawaddy FM (2 per cent), VOA (2 per cent), City FM (1 per cent), RFA (1 per cent), Bagan FM (1 per cent), Cherry FM (1 per cent), Thailand (0.1 per cent), All India Radio (0.02 per cent), DVB (0.02 per cent) and China (0.02 per cent).

9 The most popular Burmese FM radio stations in terms of listenership are: City FM (Yangon), Mandalay FM (Yangon), Cherry FM (Naypyidaw), Padamyar FM (Naypyidaw), Shwe FM (Yangon), Bagan FM (Naypyidaw), Pyinsawaddy FM (Yangon) and Padauk Myay FM (Naypyidaw).

10 During the mission period, Aung San Suu Kyi embarked on her first visit outside of Yangon to Bagaan.

11 On the other hand, 36 per cent (15.3m) watch TV, 34 per cent (14.4m) listen to the radio, 16 per cent (6.6m) read journals (primarily news weeklies), 8 per cent (3.3m) read magazines (primarily monthlies), 8 per cent (3.2m) read newspapers (primarily the country's six current dailies, all government owned) while 2 per cent (900,000) watch the cinema.

The survey shows that from a baseline of 10.6 million households, at least 47 per cent own a TV set. There were 5.02 million TV sets in the country in mid 2010.

Another significant scene in the urban environments is the massive presence of satellite dishes on rooftops. The cost of a satellite dish connection (which is banned, but in practice still widely used) is about USD 300. Approximately one per cent of the population has this kind of satellite dish. This indicates that nearly half the households have a TV while a small, but powerful urban-based minority has access to international media through satellite dishes. The mission team saw Yangon buildings dotted with satellite dishes indicating that no attempts are being made to hide them from the authorities who seem to be tolerating them.

Photo: Lars Bestle/IMS



3.4 The Internet and social media

Although it has not penetrated to rural areas¹², the internet is becoming the most preferred vehicle of information amongst urban youth. There is a visible and major barrier between the different social structures as far as access to the internet is concerned, but this is expected to change over the next couple of years with the entrance of at least three (GSM) mobile phone operators and another two ICT companies into the Myanmar market.

Up until mid-2011, many young people used social media platforms through proxies (since the most popular social media sites are banned) at internet cafes. However, in September 2011, the government lifted the ban. On 20 September 2011, the Weekly Eleven Journal quoted the Chief Engineer of Myanmar Post and Telegraph, an internet service provider, for saying that the blocks on 30,000 websites had been lifted as of 16 September and only pornographic websites remained banned. People can now access Facebook, Youtube and Twitter, as well as view exile media organisations, and use Gmail and other e-mail services. The exile media websites, such as Mizzima and Irrawady are also accessible in Myanmar now.

¹²According to MMRD, there are approx 400,000 internet users in the country, and the two internet service providers are purely state-owned entities.

There are also voluntary grass root initiatives that work to get stories onto the web. One example is the Yangon Press International (YPI), an initiative by a group of young journalists who have gone through international training – mainly with Internews – who use Facebook as a platform to disseminate their stories. It has around six volunteers who constantly contribute with stories from deep within Myanmar. The newly established Moemaka online news agency is another example. It has recruited 10 young, budding journalists to provide on-the-job training and sustain the news service.

More than a dozen weekly news and current affairs journals already have their own websites or are in the process of developing one. "We want to pay more attention to our website and develop it as an online news service, mainly to avoid censorship. Before sending the story to PSB, we would upload it to our website. If they curtail the story, we would withdraw it from the web, but the story would have already gone public by then," said one editor.

3.5 Myanmar exile media

Media operations based outside Myanmar – known as the exile media – should not be overlooked when assessing the media landscape in Myanmar. Exile media outlets have in the past been one of the only sources of information for the outside world on Myanmar and for large scale audiences inside the country. Consequently, they have enjoyed comprehensive donor assistance over the years.

They have maintained a dynamic pool of journalists within the country who have constantly struggled to get stories to the outside world under trying circumstances. The journalists have received professional training through donor assistance outside the country. Many of these journalists who operated under cover within Myanmar regularly assist local media stations in their professional work, although there are claims by some editors that exile media is responsible for a brain drain in the country. Some journalists within the country view them as political campaigners, not as journalists.

One of the main attractions of donors has been the border-based ethnic groups. A considerable amount of resources and efforts have been utilised by the international communities to enhance the capacities of journalists in border areas, mainly on the Thai border.

However, with the latest developments in the country the exile media too is at a critical juncture in terms of sustainability. Some of them are contemplating a change of operation strategy while some have already made plans to shift their operations from exile to inside the country. In such situations they would be competing with the local players for market share and sustainability with new challenges in new environments.

3.6 Media training activities in Myanmar

There have been several low profile media development initiatives at grass root level, including media training activities in Myanmar since 2001. These activities have predominantly centred on media training and were conducted by IMS, Internews, DFID (Pyoe Pin Programme), and Indo-China Media Memorial Foundation (ICMMF) using donor funding from the likes of USAID, Sida, Danida and OSI. The assessment mission team noticed that these training programmes were having the greatest impact within the mainstream media in Myanmar.

Since 2010, these training programmes have been extended to journalists in the mainstream media in Yangon. A few training activities have taken place on British, French and US embassy premises and at neutral venues on non-sensitive thematic areas, while other training programmes have been held outside Myanmar, mainly in Bangkok. Two such training sessions have taken place with 12 journalists in each session. These trainings have made a big impact within the mainstream media where several editors and journalists claim that the exercises helped them to reshape their media products which in return has increased their circulation.

Many of the trainings that have taken place within Myanmar have been on non-sensitive topics such as "agricultural reporting" that focused on understanding the rice production and supply chain. The 'rice policy' keeps rice on everyone's tables, and therefore, it provides a general sense of stability. This particular training for 14 reporters lasted a week and included a two-day field trip to the Irrawaddy Delta – the rice growing region of Myanmar.

Some embassies in Yangon, mainly the US and UK, have since 2010 provided fellowship programmes for journalists from independent media organisations. In another development, the Indian High Commission in Yangon has conducted an elections reporting training programme for a mixed group of government and independent journalists in New Delhi in early 2010.

Myanmar Egress, one of the few leading civil society entities in the country has been providing several vocational training programs including mass communication of which an important part is basic journalism. This has been an attractive program for many youngsters and impressive placement ratio has been recorded by the successful participants within media groups.

Media trainings in Myanmar do not mix journalists from government-owned and private-owned media because their respective work ethics and world views are very different. The experience is that more often than not, intelligence agents infiltrate such trainings because news of trainings filters out to the security establishment, who then send 'observers'. This makes reporters from independent media nervous and quiet and they do not interact, nor do they air their views freely.

At one training which included reporters from the government-owned New Light of Myanmar, one intelligence agent voluntarily identified himself. This immediately put reporters from private media on the back foot. They stopped interacting in the remaining sessions. However, according to UNESCO, they too had mixed participants, but did not encounter any major issues. But things could be different with the new developments as many journalists feel that such efforts could be tried out in the present context.

In the course of 2011, UNESCO has conducted two workshops to train journalists, both from the private and public sector in education for sustainable development issues. It is understood that UNESCO will also conduct a short technical needs assessment in order to identify the priority areas where UNESCO can assist the Ministry of Information and private sector in developing their capacities. It is expected to provide a snapshot of where media stand today in Myanmar and how and what needs to be done in a short and long term context to improve it.

Overall, the few training sessions for media that have already taken place are not sufficient to create a critical mass of journalism trainers or trained journalists that can employ their newfound skills to improve the standards of journalism in the country.

4 Major challenges for the media

4.1 The emergence of a new and immature media landscape

When analysing the present media environment and its immediate future in Myanmar, it is clear that the country's media landscape needs to be re-designed with fresh initiatives. Presently, the media appears to lack training, to be in need of professional guidance and continuous mentoring to become a strong pillar of democracy in Myanmar.

A major challenge of the media over the next five years will be to shift its centre of gravity from the state to the people. It needs to meet the demand for information fuelled by the gradually opening up of the socio-political landscape. Is the media mentally ready to make such a leap and adjust its content to the interests of the public and the needs of the people? This will be their key challenge which must be addressed in any media development initiative.

Myanmar has a strong history of being manipulated by the state, by the army, and by state allies for over half-a-century. Although these issues persist, albeit to a lesser degree, there is a danger that the market may do the manipulating as the media become attracted to the lure of corporate sector advertisement and consumer spending. The mushrooming of new publications over the past couple of years and their popularity is a litmus test for this phenomenon.

The previous strict censorship practices are now slowly being transformed into 'self-censorship' modes, but many journalists and editors are also trying to push the boundaries. With the expected arrival of new mobile phone operators and the projected development of the IT sector within the next three years, the struggle for media freedoms will have new and more diverse communication platforms from which to push forward.

4.2 Professional standards and quality of journalism

Myanmar lacks professional standards in journalism. The media environment is densely concentrated in Yangon and in a couple of other cities. It is urban centric and urban biased. Though some media have found loopholes within the existing rigid laws and regulations, the absence of a strong media culture with high ethical and professional standards is evident, largely as a direct result of the 50-year military rule. Creativity is either aggressively discouraged or simply silenced.

As in many other developing countries young journalists have joined the newsroom in a bid to gain experience and shift into a better earning profession. There are no journalism training centres in Myanmar except the state-owned journalism university which produces spin doctors for the state-run media organs and the local NGO Egress whose focus is to function as both a think-tank on policy issues and as a capacity-building centre. They provide basic training courses on journalism and mass communication.

Generally, the young journalists who constitute over 80 percent of the Myanmar media population learn journalism through trial and error in a

primitive media environment that cannot boast of basic minimum standards or best practices.

The UNESCO-supported Myanmar Media Training Center and its faculty members, a semi-government structure, is no longer trusted by the media fraternity as it has been dominated by state officials.

No Ethics - No Standards

The highly intrusive and coercive censorship policy over five decades has led most editors in Myanmar to believe that ethics and a sense of responsibility does not lie with them, but with the state through the Press Scrutiny (Censorship) Board. However, the relaxation of censorship policies in June 2011 means that the onus of media professionalism will now shift from the state to the journalists. The media will have to face greater scrutiny from the public and be accountable.

In most cases, the media organisations are young and inexperienced. In other words, the current Myanmar media – despite the dramatic changes over the past few years – remains in a stage of infancy. The largest selling¹³ news and current affairs weekly, “7-Day News”, is owned by a 33-year old IT expert, and is edited by a 29 year old Editor-in-Chief who supervises the newsroom. The newsroom is dominated by young journalists between the ages of 22 and 25¹⁴. There is no in-house code-of-ethics, agreed editorial policies or any such professional practices. This makes the productions prone to mistakes.

The news editor of this best selling weekly confessed that the quality of writing by her journalists is sub-standard. The young journalists are not exposed to best practices in other environments. In a country where foreign media was taboo and with few opportunities of interaction with foreign colleagues the average journalist can be defined as the proverbial ‘frog in a well.’ Simultaneously, the unhealthy, financial situation of media organisations hinders any investment in human resources. Hence, the vicious cycle continues.

Since 2000, several INGOs like Internews, ICMMF funded by USAID, Sida, Danida, CIDA, and other such agencies have conducted programmes on thematic training and technical support at different levels to build capacity within the media. However, these initiatives have not been entirely coordinated and designed on a strategic level and were mainly conducted by way of short-term grants. Nevertheless, many journalists who participated in those programmes claim that they have been useful and that the trainings have had an impressive impact within the community.

High Turnover - Brain Drain

Another major challenge is the high turnover rate of staff in private media houses. Reporters and editors come and go and the quality of journalism suffers because the media establishments do not invest in human resource development mainly due to a lack of funds. Also, media houses risk training staff that could end up working for their competition.

One of the major issues is brain drain, according to a senior Myanmar editor. Most of the skilled journalists produced by local newsrooms are being ‘hijacked’ by exile media for better remunerations. Good journalists trained and invested in by these publications and paid at an average of \$100 per month, are being poached by Myanmar exile media, which pays up to thrice the salaries for the same level of effort.

¹³The circulation of the publication “7 Day News” has increased by about a third to over 95,000 in just two years. This is the most circulated news weekly in Myanmar.

¹⁴Though there are no formal statistics, according to the many journalists interviewed, the average age of the Burmese journalist is between 22 and 25.



Photo: Lars Bestle/IMS

4.3 An information vacuum

The main driving force of the military regime in the course of its 50-year rule was to keep the people uninformed. This was achieved not only through strict censorship regulations, but also by not allowing media to operate even at its minimum capacity. Both the political and economic environments have been littered with barriers to access to information or dissemination of information to the public. In addition to politically sensitive information, the public has been denied basic information about livelihoods, HIV/AIDS, family health and even natural disasters.

One editor described how he struggled to publish a picture of recent floods on the front page of his publication with an appropriate caption. The Press Scrutiny Board did not want him to write that 'thousands of acres have been destroyed by floods'. This was in July 2011. In this way the information vacuum has been embedded in the social fabric for the past 50 years.

However, the situation is changing as far as print media is concerned. Print media is starting to enjoy relative freedom due to the recent relaxation of pre-publication censorship while broadcast media suffer from a lack of content, capacity and technology.

The radio remains the most preferred vehicle of information to the rural populace. In many rural parts of the country, people do not have the financial means to even to buy a three dollar radio set to access any information.

4.4 Access to information and media

Journalists who are struggling to reach information face numerous challenges: the state's refusal to provide information and the lack of resources. Media organisations have no capacity to dispatch journalists to remote areas to obtain stories for their publications. Even if they had physical access to a particular remote area, they often do not have the professional capacity to grasp the story and relay it to the public. This dilemma has affected the smooth, uneven flow of information within Myanmar.

Access to media and limited outreach outside the main cities has also been a key contributing factor to the large-scale information vacuum that exists

throughout the country. The poor income levels and the low literacy rates do not allow the majority of the rural masses to access print publications. Thus, the best source of information remains the radio, but the low income levels remain a barrier.

However, since June 2011 the government has commenced conducting press conferences in order to provide information to the media. On the inception days, the ministers and bureaucrats were embarrassed with questions, but later became accustomed to it, according to a senior editor in Yangon. The Parliament proceedings are also being covered and the rigid systems against access to information are slowly being reversed, many journalists feel.

4.5 A divided media

In any media development environment, unity and camaraderie among different stakeholders as well as peers is paramount. This is starkly absent in Myanmar. The country has no independent organisations that can campaign and advocate for the improvement and professionalisation of the industry. On the contrary, suspicion and deep-rooted animosity prevail amongst some actors like editors and owners. This is often based on political affiliations and relationships rather than business interests. Also, the growth of media outlets has fueled the animosity.

While there are also examples of key media houses collaborating to exchange views and ideas against state interventions, little unity was observed at any level of the media environment by the assessment team – be it between journalists, editors or media owners. Some journalists were seen to meet in pubs and bars in the evenings for political and industrial chats, an encouraging development.

However, there has yet to be any organised formal or informal gathering of journalists in the country, something which is likely to be blocked by the government. The only existing Writers and Journalists Association is a proxy of the government. The absence of a strong, media-related institution also creates issues for donors in search of potential partners in media development projects.

However, things even in this context are changing. Myanmar journalists who have understood the importance of unity have formed a loose structure named 'Myanmar Journalists Network (MJN) in the shape of a welfare organisation with approximately 170 members. The average member is 25 years old. The government has indirectly contacted MJN for consultation mainly on media law issues which could be considered an unofficial legitimisation of the grouping.

4.6 Weak links between civil society and the media

Despite the generally stifling socio-political climate, civil society and journalists have been given more maneuvering space to cover a wider range of topics more openly than before. While this is a significant change, the potential for widening this space has yet to be harnessed by both civil society and the media.

One of the reasons for this is due to the nature of civil society organisations in Myanmar, which is different from that generally known from other developing countries. A number of gatherings and institutions did emerge

in the wake of the Nargis cyclone, but the country has yet to witness the formation of a real civil society.

In 2003, there were a handful of international NGOs in Myanmar. Now, an estimated 70 international NGOs are based in Myanmar – in addition to many hundreds of local NGOs and community-based organisations.

The assessment team also noted that organisations such as United National development Programme (UNDP) which runs a large livelihood and community development programme, do not work with media. In this case, an access to information strategy would help fill the current information void at grassroots level. Only UNESCO is currently involved in media development programmes, but as such, no strong links have been forged between civil society and the media.

4.7 Press scrutiny laws

Myanmar has no clearly defined media laws. The media is governed by the Printers and Publishers Act of 1962 amended in 1971 and generally addresses the entire printing and publishing sector of the country. The Central Supervisory Committee for Printers and Publishers Registration and Press Scrutiny which is popularly known as the Press Scrutiny Board or rather, the censoring board, announced a new set of policies on censorship in June 2011, but did this without amending the existing Act. Therefore, although the 2008 Constitution upholds freedom of expression, it is contradicted by the already existing laws of the country, and mainly by the 1962 Printers and Publishers Act.

The Act dictates criminal punishments for those who violate the law. However, the newly announced policies which exempt some 178 magazines and other publications from advance scrutiny specify a fining system instead of jail terms.

According to many critics, the new system is a means of income generation for the economically ailing regime. Since the jail terms outlined in the 1962 Act have not been withdrawn, draconian laws can still be implemented and used against the journalists and publications. The Electronic Transaction Act, the Official Secrets Act and the Motion Picture Laws also remain hurdles to bypass for the media in Myanmar.

The most important developments as far as media is concerned are the efforts by the government to formulate a set of media laws on its own initiative. The critics claim that there has been little consultative process with media practitioners, stake holders and civil society in this process. Given the fact that the current Information Minister is not considered pro-reform, the ministry is adopting an authoritarian policy in drafting the laws. However, after some lobbying by interest groups, the government has approached several organisations including UNESCO to assist them in this exercise. Many expect that the new media laws will be presented to the House within the first three months of 2012.

4.8 Possible return by the military to power

Many are still skeptical of the newly elected regime, which is comprised of by ex-military regime members and to some extent, their allies. The critics do not rule out the possibility of the military returning to power with strict military laws if developments in the country do not go their way. These

fears create an unsettling environment for the development of a smoothly operating media, as the media would be amongst the first to be targeted upon a return of a military dictatorship.

4.9 Unhealthy foreign exchange policies

Any media development efforts in Myanmar would take place in the face of an unstable economy. The country is struggling with the impact of a drastic difference between the official and black market exchange rates¹⁵. Any funds transferred to Myanmar through official channels would be unwise in light of the black market rates.

This affects the development of the media industry as most goods are imported and depend on the international market rates. As things were tightly controlled under the military regime, such issues did not come into effect, but as the market is being opened, the situation is different.

This exchange rate issue is now being slowly resolved through drastic and rapid interventions by the government. It has allowed private banks to open foreign exchange retailers and managed to bring the exchange rates on par with black market rates, but the money transferring regulations still remain a challenge.

4.10 Ethnic clashes and armed conflict

Myanmar is experiencing one of the longest-running, armed, ethnic conflicts in the region, mainly in the border areas. Although censorship has kept these conflicts out of local media, Myanmarese exile media and other international media outlets have managed to publish detailed stories about the conflicts. Media have largely been banned from accessing the areas of conflict and therefore an information vacuum also exists in these areas. Any media development project at the national level is likely to be affected by these ongoing conflicts and the government is likely to use the national security aspect as an excuse to curb media access to these areas.

With the recent political developments, some militant groups have commenced peace talks with the government.

Photo: Ranga Kalansooriya/IMS



¹⁵The official rate for 1 USD is 6.2 Kyats, while the black market rate of the Dollar is approximately 850 Kyats in July, 2011. But this situation has been subjected to drastic change from November 2011, bridging the gap to a thin margin of difference.

5 Major opportunities for media development

5.1 Gradually relaxing censorship procedures and the expanding media market

After five decades of censorship, the government is now slowly relaxing its press scrutiny procedures, allowing media to discuss socio-economic issues. News journals are now permitted to publish interviews with "the Lady," cover opposition events and all publications are free to report on the proceedings of Parliament. This presents an opportunity for both Myanmarese media and the international community. Where local mainstream media is concerned, this is an opportunity for them to test the waters and to bring social and economic issues into the public discourse, creating a platform for greater engagement with the people. This could be the beginnings of becoming the fourth pillar of this emerging democracy. For the international community, this could mean the possible emergence of a democratic environment in which they could play a role in media development.

The space for media independence is slowly but steadily expanding. The media landscape will also expand with more media products entering the market with the state media apparatus as well as the private media outlets. With the hopes of exile media entities also entering into Myanmar, the media market would become more competitive and challenging.

Many journalists and editors are hopeful that the government will continue to further relax censorship and other unhealthy stifling practices on media. One of the proclamations that has spurred this hope comes from the Press Scrutiny Board which states:

"In accordance with the 2008 Constitution, the Republic of the Union of Myanmar was formed and a modern developed nation is being established. In accordance with Sub-section (A), Section 354, Chapter (8) of the Constitution titled "Citizen, Fundamental Rights and Duties of the Citizens", every citizen shall be at liberty to express and publish freely their convictions and opinions. Sub-section (D) of the same Section also guarantees that every citizen shall be at liberty to develop their language, literature, culture they cherish, religion and custom they prefer. Therefore, in accordance with the Constitution, the present press scrutiny policies should be modified and applied step by step." This provides hope for the future.

5.2 Young media community hungry to learn

The young media community in Myanmar has never enjoyed the freedom to freely practice their profession. Equally, they have not been exposed to best practices and necessary journalistic training. Therefore, the training in journalistic practices can begin at a very basic level. There is a hunger for knowledge and training in the media community following almost two generations of being kept in the dark. Capacity-building exercises for these young journalists would be effective, but must employ the correct strategy and approach to succeed.

5.3 Voluntary grass-roots initiatives for institution and organisation-building

There is much enthusiasm amongst leading Myanmarese journalists to come together to discuss common issues and challenges. They have begun to meet in public places in an informal manner. As there are no formalised, independent, organisations/groups in Myanmar that represent the interests of journalists, these initiatives could be seen as the foundation for such institution-building exercises in the community. The trade unions were granted permission to operate in Myanmar under the new labour laws which were enacted by the President on the right to form labour associations. Therefore, these voluntary initiatives could lay the groundwork for unity-building among different stakeholders in the media industry in Myanmar.

5.4 Change of regime - change of attitude: from uniform to civilian

The change of regime and subsequent change of attitude has been the key driving force behind the small, but dynamic changes that have taken place in Myanmar in 2011. Even a small step towards democratic transformation is a major leap forward for a community that has been under strict military rule for half a century.

It is evident that the new regime is eager to rid itself of its international reputation as a "Pariah State" and rebrand itself through a regional approach by gaining the ASEAN chairmanship in 2014 which was granted at the recent ASEAN Summit in Bali. With this objective, the President set up the National Human Rights Commission to bring the country in line with its commitment to promote and protect human rights as envisaged in the ASEAN Charter. This have been followed up by relatively exemplary labour laws, drafted with the assistance of ILO.

With a regional and international acceptance in mind, as well as an aspiration for economic growth, the present civilian regime has taken significant steps toward democratisation in Myanmar. Media restrictions are slowly being relaxed; the opposition has been actively engaged in the economic development process as well as its own political activities. It is now getting its grassroots organised to face by-elections taking place in the first half of 2012. Exiled Myanmarese activists have been encouraged to return to the country; foreign dignitaries have been invited to visit Myanmar and have been permitted to meet with Aung San Suu Kyi. Parliamentary proceedings have allowed to play a key role in the country's policy matters and they are being reported in media. This is widely seen as a change of attitude by the new civilian regime, after the Junta's withdrawal from government.

6 Recommendations

Myanmar is at a cross roads in a bid to transform itself from a rigid military rule to an emerging democracy. Though observers are skeptical about the future of the country, many signs and developments indicate that the Myanmar leadership, since its induction on 30 March 2011, is taking significant steps towards political transition.

As pointed out in the 22 September 2011 analysis by the International Crisis Group (ICG) a major reform is underway and “the President gives every indication of having the political will to put Myanmar on a new path”. The most significant changes have happened since July 2011 following the IMS assessment mission. From March to July 2011 the President was cautiously introducing a balanced approach between reformists and reactionaries. From July, the changes have moved ahead rapidly, gaining an almost unstoppable momentum, according to the ICG analysis. Whether these will be lasting changes is yet to be seen and requires deeper analysis of the power dynamics, but as of now it appears that the President will be able to move ahead with his reform agenda.

Transforming a country emerging from decades of ethnic conflict and military rule is challenging. One of the questions is whether Myanmar is able to steer clear of ethnic conflict and create the democratic institutions necessary to carry forward the reform process. Is civil society prepared to play its role in ensuring a transformation that meets the needs of the people of Myanmar? What is needed in terms of an enabling legal environment to frame and facilitate an economic, political, social and right-based transformation?

These questions apply to the media and its fundamental role in supporting change and civic engagement as well. A professional and vigorous media community can both prevent conflict and promote democratic processes and good governance, through the automatic functions of disseminating information, furthering awareness and knowledge, promoting participatory and transparent decision making, and addressing perceived grievances.¹⁶

Under the challenging circumstances facing Myanmar the media could ideally contribute to societal reconciliation, alter misperceptions and act as a watchdog over the authorities and vested interest groups. On the other hand, if the media landscape remains one-sided in its reporting, it may have negative repercussions in terms of fuelling tensions and undermining democratic processes.

In this context it is important to note that the media in Myanmar has never functioned as a Fourth Estate of a democracy. The new generation of journalists has little experience or knowledge of how media should work in an emerging democracy. Although the legal regime on censorship has been relaxed, the overall media policy and legal environment is characterised by control and is not geared to support political reform.

Thus, building upon the IMS assessment of the Myanmar media and the challenges they are confronted with within a still tightly controlled media environment, the underlining theme of the recommendations is to provide support for the media and civil society to enhance its critical role in helping to carry the ongoing change process. The media's role contributing to the current expansion of democratic space is essential for ensuring that the

¹⁶ *International Media Support – A platform for action 2009-2014*

reforms which are underway will benefit the population as a whole and not just the power holding elite.

Looking ahead, time is also ripe for initiating the creation of a more mature media environment with the aim of enhancing professional standards that will enable media to become an institutional pillar of democracy. The process could start by identifying individuals, developing their capacity, assisting them in institution building, expanding their networks and building strategic partnerships. In the longer term, this would form the foundation of media development activities.

Support is recommended in three broad areas relating to the enabling legal and policy environment, the institutional and professional capacity of the media and the access to media and information in rural areas outside Yangon.

- Enhance national capacity to reform media-related policies and legal frameworks and to engage in democratic transition
- Build the foundation for media and journalism to professionalise
- Expand access, production and outreach of media content through new media and other appropriate channels of communication

The three proposed areas primarily focus on addressing the media's present needs for fulfilling its role in the political transformation from authoritarian to a more democratic rule, with a specific focus on addressing situations where media development is still ruled by rigid media policies. The recommendations should be viewed as broadly guiding directions for the course of action in the changing political context. They will serve as guidelines for the course of action that IMS will pursue in Myanmar.

This said, only some of these recommendations will be addressed directly by IMS and implemented in collaboration with local and international partners. The aim is therefore for these recommendations to serve as inspiration and guidance for others engaged in supporting the media in Myanmar.

6.1 Enhance national capacity to reform media-related policies and legal frameworks and to engage in democratic transition

Provided that changes keep moving in a more open direction there will be more maneuvering space for civil society to engage in and influence policy issues.

In the current circumstances support is needed for media policy and professionalisation of environments with a view to building a foundation for transparent and accountable media policy and regulatory frameworks. That would be essential precursors for the development of a stable media environment. In addition, it would be important to work with civil society and media to strengthen networks and associations that allow for collective approaches to protect and enforce the rights of media workers.

Since new media laws are rapidly underway, assistance to the government and parliamentary committees is needed to ensure that the policies and laws are in line with international norms and standards. Other legal areas such as an access to information law would also become pertinent at some point.

Fostering stronger links between civil society and journalists to cover topics more openly and diversely than before is another recommended intervention area. The devastating Nargis cyclone exposed the state's lack of capacity to provide humanitarian assistance. This forced the former regime to accept aid from the international community and allow humanitarian organisations to become involved in the rescue, recovery and rehabilitation work. Recommendations include engaging with the emerging civil society increasingly influencing the authorities on issues important for the masses at large. They could be trained to creatively interact with media to push for coverage on governance and development issues.

6.2 Creating the foundation for media and journalism to professionalise

The poor quality of the Myanmar media is in itself a justification for the need to improve capacity building efforts in the country. While there have been a number of isolated efforts by organisations such as Internews, USAID, ICMMF, etc., there have been no concerted and sustainable initiatives to address the issue of low capacity as a whole.

Local 'trainers' have emerged from these training initiatives, but there is a lack of more formal skill development mechanisms or a sustainable and organised programme to back them further. Most importantly, the local trainers have received no formal training.¹⁷

Despite its many challenges, the media is moving towards becoming an industry. It lacks several features, but as the media continue to expand and more new publications and broadcasting stations emerge over the next couple of years, the sector will demand more trained journalists and technical skills. The present one thousand-man¹⁸ strong media community is expected to expand by at least 40-50 per cent within the next three years.

Due to the transition from being censored by the state to practicing self-censorship, the media will also become more accountable to the people. This will be a new situation for media since the state's coercive apparatus has been the only people to whom they were accountable so far. Hence, the need for ethics and understanding of responsibilities for the media through formal training mechanisms is paramount.



Photo: Lars Bestle/IMS

¹⁷The Government runs its own media training university department under the Ministry of Information with mostly ministry officials as lecturers

¹⁸As there are no official figures on the number of journalists, this is the figure mentioned by all the interviewed seniors from the Myanmar media

6.3 Expand access, production and outreach of media content through new media and other appropriate channels of communication

The Yangon and urban centric media do not necessarily address the media needs of the rural population. The censorship issues, as well as the capacity of the media, fuel this situation. This topic has different dimensions. On the one hand, the media lacks information and content due to various issues such as access to information. When it comes to media content such as radio production, this is costly and many stations are eager to broadcast (non-sensitive) content produced by outsiders. Broadcast in ethnic languages also lingers behind.

On the other hand, the majority of the rural population has limited access to media and is thus deprived of vital information on health, agriculture and other livelihood issues. The recent natural disasters in the country have highlighted the lack of access to information. Both political and economic factors have contributed to this situation. There are knowledge gaps amongst media practitioners. Due to problems related to access to information, exposure and keeping abreast with changes in media practices, many journalists' understanding of the economic, political and social context and requirements of the journalism trade, is limited. They must be introduced to methods of investigation, research and societal context.

FM Radio is a burgeoning sector, although state-managed and chaperoned and mostly owned by cronies of high-ranking government officials. There are at least seven in Yangon with City FM as one of the most popular. In general, content generation is a major problem for the stations. They need help and creative engagement could provide inroads into this sector. One way to help the stations could be to generate content through production houses and provide the content free of charge to the stations. This content could be infotainment.

On the new media front, many journalists who have worked for the exile media are now exploring the possibilities of using web publications to tell their stories. For example, in one initiative, a group of independent volunteer journalists are now in the process of creating an online publication, which will generate news from within the country in both the Myanmar and English language. In fact, there are seven publications that have already gone online and several more will go down this path in near future.

Although internet penetration in Myanmar is less than one per cent, new media and ICTs are becoming an attractive way for urban youths to communicate and interact socially. Internet cafes are always full of young customers who, until before the ban was lifted, accessed banned news and social networking sites through proxy websites. At the same time, the ICT sector is expected to experience a major boom within the next two years with the arrival of Indian IT companies in the country along with new mobile operators.

The authorities have been known to jail journalists, and most of those presently jailed are bloggers. At the time of writing this report, there are nearly 20 bloggers/reporters serving prison sentences between one and 15 years for sharing videos and other material with exile media, as well as for online postings about politics and state violence.

Topics like HIV/AIDS, poverty alleviation, and natural disasters which have been taboo in the media are now being covered by the media in a manner



Photo: Lars Bestle/IMS

sometimes critical of the authorities. Hence, this opportunity can be used to push the boundaries. Developing content on developmental issues could be the beginning of providing the rural population with necessary information and generating discussion in public. Radio appears to be the most suitable media, given its audiences' accessibility and literacy issues in the country.

On the new media and ICT front, there are a few but dynamic grassroots initiatives focusing on online media which could be wise to explore in order to strengthen online media in the country. There are at least three such initiatives by groups of journalists in Yangon who either use primary websites or social networking sites such as Facebook to disseminate news stories from inside Myanmar. At the same time, many magazines and journals are now focusing on developing their websites and concentrating on real time updating. One of the objectives of this initiative by print publications is to push the boundaries of censorship. Therefore, the beneficiaries of this action will include the existing print publications as well.

Annexes

Annex 1: List of References

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Annex 2: IMS tools and approaches

IMS, with its specifically designed mandate and decade-long experience, has dealt with sensitive political situations in many parts of the world and successfully assisted the media in emerging democracies as well as in countries undergoing political transition. Upholding partnerships as an operational principle, IMS has derived three different tools, which will be utilised, depending on the local conditions and ground realities. These tools are:

1. Media Freedom Tools (Safety and protection, media rights violations monitoring and advocacy)
2. Media Structure Tools (Community, exiled and alternative media, technical capacity and capacity building, ICT and networked communication environments)
3. Media Content Tools (Specialized training, media content monitoring, production of diverse and professional tools)

Considering the local conditions and ground realities of Myanmar, localised and tailor-made versions of the Media Structure and Media Content approaches would be applicable in the Myanmar context. IMS has extensive global experience in approaching such nations in political transition through local and international partnerships.

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