THE BUSINESS OF MEDIA IN MYANMAR, 2013

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A report commissioned by Internews

Internews

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ABOUT INTERNEWS IN BURMA:

The story of Internews' 12 years of work in Burma is one of notable innovation, consistent capacity-building and demonstrable impact achieved in one of the world's most difficult environments for media development. With over 1,000 Burmese journalists trained to date, Internews has been the key actor in media development through the most significant political developments of the decade. Internews is deeply invested in Burma's continued progress and brings unrivaled experience to the pursuit of developing a well-informed, increasingly democratic and more just Burma.

- We support the production of a great range of radio and TV news items on key policy issues that reach wide audiences — especially in the media dark ethnic states — through the international Burmese broadcasters VOA, RFA, BBC and Democratic Voice of Burma.
- We bring together journalists from all ethnic groups for shared training exercises that build skills and shape professional networks with the ability to report on policymaking at national and state levels and on key themes (peace processes, economics, environment, human rights, health, education etc.) that are critical to the future of the country.
- Internews conducts various research in Burma, including a series on the ICT environment and surveys on the media and information environments in Karen, Mon and Shan states.
- We expand journalists' access to information through the Internet and enable their use of the Internet for wider dissemination of media products while protecting their identity and personal information.

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EXECUTIVE SUMMARY

Burma's sudden embrace of democratic reforms has created a wild new frontier economy, released media from the chokehold of censorship.

Changes are visible, real and fast: Yangon's roads are now clogged with imported cars and more than 100 auto showrooms have sprung into being. Images of sexy Burmese women, once forbidden in advertising, now lure consumers for products ranging from diamonds to plumbing supplies. Hotels are packed with tourists and motor coaches lumber through pot-holed streets. Coke and Pepsi ads, signaling the opening of a virgin battleground in the global "Cola Wars", line the road to Yangon's airport.

For media houses, it is a giddy time. Pre-publication censorship of print news media ended in August 2012. Restrictions on advertising content (including prohibitions on specific advertising categories and the use of various types of imagery) were lifted. Journalist associations have formed, disbanded, and been recreated. Rumors about the changing environment are thick.

This is not just a transition within the print sector; it is a transformation of the entire media landscape. All parts of the media ecosystem are changing and every aspect of the media infrastructure is being challenged.

The possibility of publishing daily newspapers — formerly a privilege only open to state media — has emerged. The space for private companies to enter broadcast radio and television markets has opened. The government has committed to a rapid expansion of digital and satellite infrastructure that will support a more robust media environment. The price of cell phones, formerly more than $2,000, has dropped dramatically. In-home internet access is now affordable to the middle class.

"Burma's situation has changed so fast we can't believe it ourselves."

Hkun Htun Oo, released political prisoner and current government advisor

Access to international programming, once blocked, is now fueled by the rapid expansion of satellite networks. Facebook is the platform of choice for many reporters and even U Ye Htut, Director General of Information and Public Relations within the Ministry of Information (MOI) is putting out press releases and debating media issues using his Facebook page.

Yet this is not an easy transition. Within this dynamic scenario, very real risks exist for independent media. A "perfect storm" is emerging in which the media market expands unnaturally without a concurrent growth in advertising revenues, reporting capacity, distribution channels, legal protections, or experienced business management.

Independent media still face multiple layers of economic constraints, including the continued use of licensing as a form of media control. There do not yet exist the legal, regulatory, or economic environments that will support a thriving and competitive independent media sector. The media environment is

“My worry is the slow pace at which economic benefit will reach the vast majority of people. I’m an old man. My greatest fear is that I might be reborn in 2030 as a girl in a Burmese village.”

Government Advisor

chaotic, changing rapidly, and experiencing a “land grab” for licenses ahead of passage of the Media Law. People are applying for broadcast licenses even before there are forms to fill in and it is still unclear what criteria will be used in allocating them. In this pragmatic environment, those who wait for a more ordered universe will likely be excluded from it.

Thus Burmese media are leaving a completely skewed and artificial economic environment and entering one that is even more wild and unreal. Although there has been recent economic expansion, Burma still operates under a system of crony capitalism where money changes hands with neither transparency nor taxation. Real income growth is slow to reach the vast majority of citizens. Burma, despite is abundant natural resources, is the poorest country in SE Asia and a third of its residents live in poverty. It ranks 204th out of 228 countries for per capita GDP[i]. And the average per person income is around $1 per day.[ii]

Moreover, with the influx of international businesses and the privatization of real estate into the hands of the military elite during 2010–2011, real estate speculation has driven the price of housing to unprecedented heights in Yangon. Residents have seen their limited discretionary spending power eroded.

Thus, as the market suddenly and simultaneously opens for a wide range of news and entertainment media, it is unclear what business models will support them: the advertising market remains tied to the weak consumer economy. For example, the entire annual market for advertising in Burma has been estimated at approximately $525 million or less than $10 per capita. By comparison, in the U.S., ad spending is nearly $500/ per capita.[iii]

Subscription revenue, whether for print or satellite, also remains constrained. When journals routinely charge 500 kyat per issue in a market where people earn only 1,000 kyat a day, expanding the base of buyers will be challenging and likely occur only in urban centers.

Many media houses are unprepared to face these business challenges. They lack essential business skills, especially the core competencies of financial management, competitive selling, and self-marketing. There is a critical lack of middle managers in every business segment in Burma, but media is hardest hit because of the junta’s long-term economic and political persecution. Burma does not have the legal infrastructure, well-developed financial systems, or access to capital that typically support media businesses.

The following pages provide an in-depth profile of the fast-changing media sector in Burma, from government regulation, to the economic environment and the growth of media outlets themselves. Putting these developments in context, the final section highlights potential hurdles and outlines recommendations to help usher the Burmese media environment into a newer, freer, more sustainable era.

“Is the government actually using market forces instead of direct power to push some of the independent media houses out of business?”

Media CFO, upon learning that multiple newspapers plan to convert simultaneously to daily cycles

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REGULATORY AND LEGAL ENABLING ENVIRONMENT

The Government and Media

The government is unfamiliar with media and unaccustomed to its role. It seeks the appearance of free media but finds it hard to lose control over its message and has shifted its means of media influence to less direct — but still intimidating — methods.

Although pre-publication censorship has ended, old habits die hard. The Press Scrutiny and Registration Division (PSRD) was recently disbanded, it has been replaced by the Copyrights and Registration Division (CRD). It is expected to continue to monitor all media output and, until the legal environment for news media changes, editors who flout the new guidelines risk prosecution under Burma's existing laws which include both criminal and civil libel penalties.

Prior to restructuring, the PSRD censorship board circulated a set of guidelines to local news journals, warning editors that "the state shall not be negatively criticized." Prohibited is "wording that encourages, supports or incites individuals and organizations that are dissident to the state," as well as "things that will damage ties with other countries."

Journalists report that officials and ministries — while publicly lauding the end of censorship — now use an assortment of techniques to influence and suppress reporting. Examples are easy to come by. The Burmese bureau chief of a foreign news agency was recently called by the President's office and threatened with imprisonment if she failed to name her source on a story about Obama's visit to Yangon. Editors are being bombarded with lawsuits and official letters threatening lawsuits.

Kyaw Min Swe, editor of the weekly news journal *The Voice,* has been sued multiple times. After *The Voice* cited an auditor's report alleging the Ministry of Mines misappropriated billions of kyat in public funds, criminal proceedings were brought forward and he faced up to two years in jail and an undisclosed fine. While the suit brought by the Ministry of Mining has been dismissed, he now reports that he has other suits brought against him. These are an expensive distraction and a threat to his personal well-being, and are clearly intended to have a chilling effect on reporting.

Journalists who were freed during the government release of political prisoners report another form of intimidation. Although freed from jail, they (and other prisoners) have not been granted amnesty. Thus at any time they can be re-arrested and, if convicted, the remainder of the original sentence will be added to any new penalties. Original sentences were egregious, with decades of imprisonment for often minor or wholly fictitious transgressions.

The Media Law

To bridge the past and the present, the Burmese government is drafting a new Media Law, which is the subject of much discussion, speculation, and rumor-mongering. It has two major components, the Press Law and the Broadcast Law, which are to be released at separate times. Until they are released, publications remain subject to the 1962 Printers and Publishers Registration Law, as well as the Electronics Act, which have been used in the past to silence journalists.

Former Minister of Information and Communications Kyaw Hsan was widely criticized for his handling of the Media Law, which was being drafted in secret by officials unfamiliar with media. He was replaced by a new minister, Aung Kyi, who has put in place more transparent processes for crafting the law. Like his predecessor, Aung Kyi also lacks a background in media, having formerly held roles as the Minister of Labor and the Minister of Relations — the key liaison with Aung San Suu Kyi.

One of Aung Kyis' commitments to transparency was the formation of an Interim Press Council. Its leadership was elected by members of three journalist associations — the Myanmar Journalists Association (MJA), the Myanmar Journalists Union (MJU) and the Myanmar Journalists Network (MJN) — following an acrimonious debate. The Council is now comprised of 27 members and includes leading representatives from *Eleven, The Voice, Popular, Open News, 7 Day, Yangon Times* and *People News.* It is headed by retired Supreme Court Judge Khin Maung Aye and top roles are held by Maung Wuntha (chair of the MJA),

Ko Ko (Yangon Times Group), Kyaw Min Swe, and Naing Clyar Win (Popular Group).

The Press Council's role has been to draft a code of conduct/ ethics code for journalists and is to act as a self-regulator: it is an intermediary between the government and independent journals. It thus often finds itself in the midst of controversy. The Press Council is designed to be temporary and is recognized as a key partner in drafting the Media Law; once the Law is enacted the Press Council is intended to disband.

Media Licensing

Under the new laws, it is expected that all media will still be licensed. Licenses will be issued by the newly-created Copyrights and Registration Division. The government has, in the past, rigidly controlled licensing for all forms of media. Only the state could operate radio, television, or daily newspapers. Other independent print news media were tightly licensed and only allowed to publish weekly. Individuals with close ties to the government still hold most of them as a form of investment. They "rent" or sublet the licenses to publishing groups and own the brand name if not the organization.

Now, the government has signaled its commitment to allowing daily newspaper licenses; applications will be accepted in February 2013 with daily publication possibly starting as early as April. Seven journals have signaled an intention of applying, including *The Voice, Popular, Eleven, Yangon Times, 7 Day, Venus News,* and *Myanmar Times.*

While rules and regulations have yet to be formally announced, and the Press and Broadcast Laws have not been finalized, organizations are already applying for and receiving licenses, especially in the broadcast sector. Although the selection criteria for issuing licenses are still unknown, a number of them appear to have been granted to cronies. There is a sense that regardless of the imminent changes to media licensing — particularly in the broadcast sector — it's best to get in now and lock up the best territory before transparent processes are put in place.

As such, the initial private-sector FM licenses have been issued to large businesses with close ties to the government. Bagan FM is owned by the Burmese tycoon Tay Za who operates the Htoo Group conglomerate. His company enjoys near-monopoly ownership in many parts of the telecommunications industry. According to the Democratic Voice of Burma, Tay Za is also a target of U.S. financial sanctions and described as "a notorious regime henchman and arms dealer" by the U.S. Treasury.[iv]

The country's internet infrastructure is largely controlled by Redlink, a company owned by the son of Thura Shwe Mann — former junta member and currently Speaker of the lower house of the Burmese parliament. Also subject to licensing are exile media and outside agencies that, during the junta's regime, used secret reporters to bring Burma's stories to the world, and broadcast the world's news to Burma. The licensing and registration issues for these entities remain murky and protections for their journalists are vague if not non-existent.

Even so, VOA, Mizzima, and DVB are already operating in Yangon. Voice of America (VOA) is an English-language content partner to state media Myanmar International television. Mizzima is operating legally in Yangon under an import license, allegedly importing content for its weekly M-Zine+ print/online magazine (although observers close to the situation report that the majority of content is produced in-country). Democratic Voice of Burma (DVB) is operating newsrooms in both Yangon and Chiang Mai, but is in uncertain legal territory.

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ECONOMIC EXPANSION, THE ADVERTISING MARKET AND OPPORTUNITY SEGMENTS

Despite the dramatic expansion of the legal space in which media may operate, there is no parallel guarantee that there will be simultaneous growth in the local advertising base.

Experts feel that the near-term growth in advertising revenue will come from global brand advertisers, many of whom will likely bypass news media by placing ads in regional satellite networks with international programming and in highly popular entertainment environments, whether magazine or broadcast. Panasonic, Samsung and others are already actively advertising on Yangon billboards. Overall growth in the local economy, which would then create a dynamic Burmese advertising market, is expected to be slow because the infrastructure for expansion is absent.

Short-term, there are important economic developments that should fuel longer-term local growth. The World Bank has opened a Yangon office and is has separately announced €79 million ($106) in community development grants and total investments of $245 million. The EU has pledged $200 million in development aid and has offered the same trade privileges it makes available to other low income countries.

The IMF identifies Burma as a new economic frontier that is expected to realize annual GDP growth in the 6% range. The Asia Development Bank forecasts a robust 7-8% growth rate. Yet most of that growth is expected to come initially from higher commodity exports, rather than from local business development, and with a concurrent inflation rate of 4.8% that falls disproportionately on the poor (rice, food and housing increases). Why will indigenous growth be slower than desired — even assuming sanctions are lifted instead of merely relaxed?

"The regulatory system is completely outdated....They know how to fight an insurgency, but they don't know how to run an economy."

Hans Vrjens, Dutch consultant to the Myanmar government, as told to Reuters

"We need an end to crony capitalism."

Dissident and former political prisoner

The reasons are complex and interlocking.

Currently, the economy is concentrated in narrow sectors, including energy and agriculture, and those businesses tend to be held by cronies. Extensive administrative controls limit private sector development. Invisible transactions and opaque ownership make the structures of various sectors unknown.

Until now, there has been no central banking authority. IMF has supported the Central Bank of Myanmar to become that authority, but there is not yet the transparent financial system needed to support international investment. No one has been identified capable of leading this authority. U Myint, advisor to the President and close professional friend of renowned economist Joseph Stiglitz, is retired. No other Burmese citizen is recognized as an international-level expert on economics, and thus qualified, and the position remains open.

Without a central bank, the country previously operated using

"The government has destroyed all the institutions. We have no human capital. We have focused on a national political reconciliation. Now we also need a national economic reconciliation: between the enormously wealthy few and all the rest of the people at the bottom who have not progressed."

National strategy advisor

multiple currency valuations which aided corruption and the funneled wealth to a small number of individuals and their organizations. While the currency is now stabilized and has a uniform exchange rate, it has appreciated more than 30% against the dollar (and is scheduled to appreciate again at the end of 2013) which has hurt exports — the largest growth sector — and has the potential to slow tourism.

An ATM has been installed in the Yangon airport making it possible, for the first time, for international visitors to access funds from their accounts outside the country. But for the rest of Burma, cash is the only currency and personal banking tools (access to credit, credit cards) do not exist.

Although business people eager to chart the new Burmese markets have lined watering holes at upscale hotels, foreign investment remains cautious. Clearly, the lack of banking institutions and an unclear path for repatriating profits has been a hindrance. Perhaps longer term, the lack of financial transparency and legal infrastructure, and the courts with which to redress grievances using the rule of law, will remain a high barrier to entry. Despite Mizzima's newly-launched M-Zine+ online/print business periodical, the need for English-language reporting on Burma's business and legal environment remains huge. For example, a Foreign Direct Investment law was passed this fall and is now so popular that kids sell copies of it in English and Burmese to passengers stuck in traffic.

Yet those businesses seeking to invest will have a tough time finding local managerial talent. There is not just a dearth of professional journalists, but a dearth of all professionals and managers. The destruction of the education system, the inability of students to study overseas, and the absence of foreign companies that typically import best practices, have all created a management famine.

INTERNATIONAL BRANDS ENTERING BURMA

That said, a number of global brands have already signaled their interest in doing business. The US/ASEAN Business Council sponsored an exploratory trip to Yangon that was joined by executives from the energy sector, Dell, FedEx, Google, Procter & Gamble, Dow Chemicals and Times Warner.

Parkson Department Stores, the leading brand in Vietnam, will open a 40,000 square foot location in Yangon by March 2013 to test the waters. Consumer brands with low price points have expressed interest, including Yum Brands (KFC) and McDonalds; Coke and Pepsi are already on the ground. MasterCard has licensed one of Burma's largest banks, bringing them closer to joining the global financial market and opening the door to consumer credit. Ford Asia, Toyota and Cherry (China) have all been ramping up, and sales are already brisk for the Japanese auto brands. Panasonic and other Japanese appliance makers are actively advertising on Yangon billboards.

Regionally, major brands have an established presence and are likely candidates for expansion. Unilever, P&G, Yum, Kraft Foods, Nestle, L'Oreal, and Coca-Cola, all of which have price points attractive to fledgling consumers, dominate the Indian, Indonesian and Chinese advertising markets.

TOURISM

Increases in tourism are expected to be one of the big near-term drivers of growth. Neighboring Thailand welcomed 18 million tourists during 2011; Burma had only 300,000. During 2012, that number increased dramatically with airport arrivals increased 50%. Total tourism is expected to surpass 1,000,000 with 60% arriving through the national airport and 40% coming through border gateways. Currently 21 international airlines are registered to fly into Yangon and have a total annual potential of selling 1.4 million total seats.

This surge has overwhelmed the tourism infrastructure. With only 19,000 hotel rooms nationwide, and a mere 8,000 in Yangon, this scarcity has led to hotels raising prices as much as 300%. Marriott International and other hotel brands are eagerly evaluating investment opportunities. This has fueled further real estate speculation and a concurrent increase in rents and housing prices.

Perhaps more importantly for local news media, this growth in tourism is expected to come from international visitors — whether regional or from the west — and not from Burmese travelers.

Thus the advertising market will be more globally-directed and likely be online and in English, Thai or Chinese environments. The local news media would be well-advised to add tourism-related content in these languages to their websites once they are searchable.

LOCAL OPPORTUNITY SEGMENTS

Similar to other emerging countries which lack deep internet and mobile penetration, it is probable that advertising growth will, initially, benefit traditional media. Good examples of this are seen in India and elsewhere. Even so, media leaders and industry experts lacked consensus on possible growth segments.

Real estate remains particularly opaque as transactions are hidden from both the public and from the tax bureau, particularly since real estate sales taxes were increased to 30% in August. Thus, with a few exceptions, it is unlikely to emerge near-term as a significant ad segment.

Categories formerly banned from advertising, such as beer and alcohol, will have new ways to promote: they still face restrictions, most of which can be overcome with pragmatism and creativity.

Existing segments targeting middle class and every-day consumers that are likely to expand include:

- Pharmaceuticals, home remedies, health care and "snake oil": only 1% of GDP is spent on health care and most people have no access to doctors
- Mobile phones and telecommunication services
- Computers, technology, internet
- Education (private schools, after-school instruction, foreign languages)
- Locally-branded fashion
- Cosmetics
- Fast food
- Packaged foods and sodas
- Regional brands from Thailand, India, China and SE Asia
- Cars, new and used
- Rentals and rooms for rent
- Employment
- Finance (banking, remittances)

The "1% segment," the wealthy elite, will remain primary targets for goods and services, including:

- Luxury cars*
- Gems and jewelry
- International travel
- Furnishings and interior design
- Banking
- Real estate
- Restaurants and dining
- Wine
- Building and contractors (now huge mansions are under construction in many areas of Yangon)
- Regional sports and entertainment
- Banking and investments

  *[*For example, a Mercedes SL65 was recently parked outside a Yangon sports bar. Children snuck up and touched it, then darted away. Lexus, Audi and Mercedes are visible on Yangon roads.]*

The Enabling Environment for Advertising-Supported Businesses

Ad agencies play an important role in the Burmese media ecosystem as do market research firms. There are 172 ad agencies in Myanmar but only five that operate at an internationally recognized standard: Mango, Red Line, Future Com, Myanmar Spa Today and Today Advertising.

AD AGENCY OWNERSHIP

Until recently, all ad agencies have been locally-owned. That changed in May, when Ogilvy & Mather, a division of world-leader WPP (and a major player in China), acquired a stake in Yangon-based Today Advertising, becoming the first Western ad agency to set up shop there in two decades. This should increase competition in the field and raise overall standards and accountability.

Previously, foreigners' attempts to own and operate ad agencies in Burma were unsuccessful. One reason for this was the inflated rates foreigners were charged for everything from electricity to rent. In one notable case, a Thai owner — after trying to gain traction — retreated and found local people to operate his businesses.

Happily, this is an industry that seems to be relatively free of the influence of crony businessmen. Because of the nature of the business — cyclical and highly reliant on creativity — it has not yet appealed to those close to the government who prefer businesses tied to natural resources and infrastructure which have large, consistent, and growing revenue streams.

International advertisers are beginning to work with the local firms. Coca-Cola contracted with Spa Today to place its media buy in Burma. Coke is currently using billboard and transit ads, and later plans to use print and television. Red Line agency got the Pepsi media placement account. Pepsi plans are similar, calling for them to use billboard and transit signage to get started, adding print and television later. Today, the "Cola Wars" have begun and billboards featuring Coke and Pepsi line the major road to the Yangon airport.

THE STRUCTURE OF THE AGENCY ENVIRONMENT

Only five big agencies have creative skills — the skills to message, create unique imagery, and develop research-based campaigns. They offer a full range of creative support and produce print ads, television commercials, FM radio ads, outdoor billboards, and vinyl posters. The other agencies are considered imitative. They essentially re-purpose international ads for the local market ... without understanding their strategy, positioning or target audience.

Thus these smaller players function, primarily, as subcontractors to the bigger agencies. They seldom produce original creative or advertising concepts; rather, they perform more operational functions, such as coordinating production, organizing ad placement and collecting ads from clients.

The agencies' largest advertisers are international — rather than local — and they were previously charged in U.S. dollars or FECs (Foreign Exchange Currency) at a steep premium to local rates. Now, with a unified currency and exchange rate, ads can be purchased priced in kyats and translated uniformly into international currencies.

Print advertising is also paid for in kyats. Formerly this gave ad agencies powerful bargaining leverage over print media, which were unable to accept payment in foreign currency or FECs. Now, print houses can begin to negotiate directly with international clients.

There are only a small number of local advertisers that have the ability to run print advertising schedules and pay on a regular basis. This stimulates advertorial-type content: flattering stories and self-censorship regarding those businesses that do advertise.

OUTLOOK

At present, agency owners are optimistic about the future. They observe ads moving out of monthly journals to weekly publications, which have claimed increased (but unaudited) circulation since Aung San Suu Kyi was released from house arrest. News about The Lady has been extremely popular, as has other content produced under a freer environment. Rates are tied to circulation; thus, prices will likely go up.

At the same time print media are becoming more dynamic and attractive to readers, generating better response and — thus — better value to advertisers. Agency owners also welcome the increasing number of media channels available in the market, including the presence of independently-owned FM radio, which offer advertisers more dynamic choices. The easing of international sanctions is credited with creating new opportunities among global brands and new players from the Greater Mekong region. Advertising censorship has been reduced, allowing significantly greater creative freedom. Brand advertising, which has been the staple for big companies like Tiger, Myanmar Beer, and others, can now be supplemented by direct advertising and product promotion.

MARKET RESEARCH FIRMS

There are several market research firms which claim to produce statistically reliable surveys, notably:

- Myanmar Marketing Research and Development Corporation (MMRD),
- Myanmar Survey Research (MSR)

MMRD is particularly influential in media markets. It tracks brand performance and market share, has conducted audience research, and produces television ratings. It has a "Media Insight" service that measures advertising expenditures and tracks ad placement across broadcast, print and outdoor advertising.

MSR also has media research services but tends to conduct social services-oriented projects on behalf of international organizations.

In addition, Gallup, on behalf of the U.S. Broadcasting Board of Governors, recently completed a major national audience survey measuring broadcast media. It developed the survey tool, hired an international to coordinate in-person surveying, and presented its results in Washington, DC in September.

However, there is a significant absence in this environment. There are no auditing or audience measurement services that are visible to everyone or crafted using multi-party methodology. The MSRD research is available for purchase, and crafted internally, but not shared as a standard measurement platform like Nielsen ratings or Scarborough audience data.

In contrast, for example, the Alliance for Audited Media (formerly known as the Audit Bureau of Circulations or ABC and which measures print publication circulation and online audience in the US) has an external board comprised of researchers, publishers and advertisers that jointly determines standards of measurement to ensure accuracy, fairness and relevance. Findings are shared publicly and used to gauge the performance of different media channels.

3 PROLIFERATION OF MEDIA

State-Owned Media

The Ministry of Information (MOI) employs about 8,000 people within its MRTV operations which comprises six daily newspapers and the broadcasting entities organized under its MRTV division, including MRTV (Myanmar television broadcasting in Burmese), Myanmar International TV or MI (previously known as MRTV3, broadcasting in English), Myanmar Radio (broadcasting in Burmese via short wave radio), and Padauk Myay Radio (broadcasting via medium wave in Burmese).

MRTV4 is a joint venture between the MOI and the privately-owned Forever Group. While described as "journalists," those working in MRTV's journalistic and editorial functions lack even basic journalism skills. Many appear to have been given jobs as political favors and producing propaganda has been their job. In-house or external journalism training has been, to this point, non-existent.

Productivity is clearly not a condition of employment. However, as the overall media landscape transforms, state-owned media are changing, as well. And those changes are highly contentious.

There are two widely divergent viewpoints:

1. **Independent local media leaders seek to close the space for state-owned media.**

   As a freer and more competitive media landscape emerges, they feel very strongly that having the state as a competitor skews the landscape. A government competitor would continue to have unnatural economic advantages: the ability to hire unlimited numbers of employees, unfair control of distribution networks, privilege and power in attracting advertisers, and economically-distorted contracts with major providers.

   A local attorney, known for representing editors now being targeted by government lawsuits, has filed a suit claiming that under current laws state media is actually illegal and should be disbanded.

2. **Exile and international media organizations, however, are perceived as trying to open the space for state-owned media and have, controversially, become involved with the MOI.** The Minister of Information Aung Kyi has announced the MOI's intention of transforming the state broadcaster into a Public Service Broadcasting (PSB) organization. That intention was later publicly acknowledged by the then Deputy Minister, Ye Htut (now Director General of Information and Public Relations and presidential spokesperson).

   International organizations are helping with that process. To date, the MOI has developed partnership with, among others, IMS (International Media Support), BBC, VOA and DW (Deutsche Welle) — all former critics of the regime.

The state's print media are also undergoing transformation. In October, the government formally announced that its state-owned newspapers - *New Light of Myanmar* (English), *Myanma Alin* (Burmese) and *Kyemon (The Mirror)*, are preparing to transform into public service media. Three state-owned dailies will be reorganized under a five-member Governing Body.

Ye Tint, retired Chief Editor of *Kyemon*, is now chairman of that governing body. Other members include Kyaw Soe, now the MOI's Managing Director of its News and Periodicals Enterprise, Ye Myint Pe (retired Chief Editor of *Myanma Alin)*, journalism trainer and advocate Ye Naing Moe, and legal authority Kyaw Zaw Naing. The group is intended to oversee the transformation of the dailies to public service entities.

Two of the dailies have now been redesigned to include color (they have press limitations, so they alternate days on which color can be published) and are making content changes. They will apparently still be state-subsidized once other newspapers go daily, and will compete in the marketplace for advertising. They will likely continue to receive highly-favorable newsprint pricing. Distribution will still be highly advantaged; no other newspapers have the ability to circulate as widely as the state-owned publications with their access to military planes and other resources.

Satellite and Direct-to-Air Broadcasting

Three major non-government satellite providers and one leading radio group serve (or are interested in serving) the Burmese market. It is important to note that these satellite providers -whether national or regional – create efficient platforms for international brand marketers to place their ads in high-quality content environments. In other areas of the world, notably the Balkans, this type of advertising has bypassed local news media which have derived almost no benefit from the increase in brand spending.

Forever Group appears to be the market leader with 250,000+ set-top boxes, low entry-level pricing (as low as $3/month, with additional price points for other channels and premium content), and a robust programming line-up. Forever also operates a joint venture with state-owned station MRTV4 whose local news and powerful platform for cross-promotion are credited with pushing Forever to the top.

The group was started in 1995 and has grown to a self-reported $20 million per year in revenues. CEO Win Maw is reportedly close to the former Minister of Information, Kyaw Hsan, who is also reported to be a shareholder. The company's genesis was creating computerized television commercials. Now, in addition to owning radio stations Mandalay FM and Pyinsawadi FM, it operates tech training, publishing, public relations, advertising and digital marketing businesses.

Forever's television operations are now branded as "4-TV" and has 51 channels, including:

- 12 free-to-air channels
- 8 HD channels (featuring soccer and sports)
- 7 digital and 24 international stations
- Talk shows on its *For Info* program
- Free-to-air international news channels, including Bloomberg, CCTV, Fox News, DW, KBS, and Arirang

CEO Win Maw played a leadership role in creating- and now running - the Myanmar Media development Center (MMDC) which opened in July. A partnership between DW and the Asia-Pacific Institute for Broadcasting Development (which in turn was established under UNESCO), it is providing technical broadcast and production training. He also recently hosted the Asian Broadcast Union meeting that attracted more than a hundred regional broadcasters and vendors to Yangon.

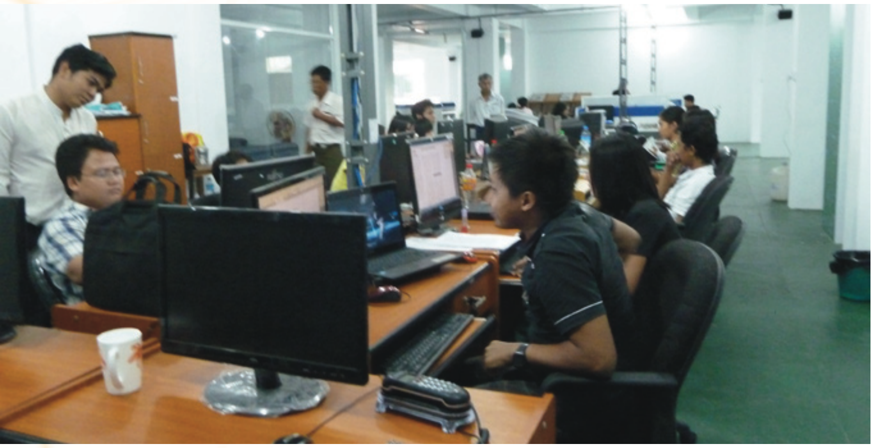
Shwe Than Lwin Company, the parent of the Shwe Than Lwin Media Company, is a giant business. Its chairman, Kyaw Win, is close to the President and is known to have strong ties to the military. The parent company operates in many lucrative venues (mining, construction, agriculture) and was recently granted cigarette, soft drink and beer licenses. Its primary media platform is SkyNet, a direct-to-home satellite service. The box costs about $180 and customers pay a single-tiered price of $14/month. It currently delivers to approximately 125,000 households. It is partnered with MI, has a relationship with VOA, and has a consultancy sponsored by Internews to help it develop its new local news programming channel, Myanmar National News Television (MNNTV). It has four locally produced channels (Hluttaw, Myanmar International, Up-to-Date, and Buddha) and has done some unexpected reporting, including covering the peace talks. Shwe and MRTV are reported to be bitter competitors.

True Media of Thailand has signaled that it seeks to enter the market with an initial $31 million investment in cable, and plans to offer substantial local language programming.

Shwe FM, launched in October 2009, is now the only fully private radio operation in Burma. It operates ten regional FM

"Burmese consumers are mature television viewers. They reward and appreciate good content ... with the exception of soap operas. Then all bets are off."

International media consultant



stations and is considering providing local news programming. As measured by Gallup during the summer of 2012, its aggregated audience comprises 40% of people aged 15+. Programming includes pop music, pre-recorded talk shows, and a variety of popular interest topics. The company believes that it will be able to put news programming out over the air and also stream it by satellite on SkyNet. The Australian Broadcasting Corporation has been cited as a potential partner to help develop programming and standards.

[Note: although Burmese media professionals dispute this, the Broadcast Board of Governors report on Media Use in Burma cites the Shwe Than Lwin Company as the ultimate owners of Shwe FM. Local experts say that Shwe FM[v] is a wholly-owned private company.]

ADVERTISING PRICING:

Broadcast television rates are set by MRTV and fixed. Satellite advertising is purchased in programming blocks on Forever stations, and in program-specific time slots on SkyNet. Radio ads are purchased on an inexpensive cost-per-second. Rates tend to be flat; the price of a 0:60 second spot is simply double that of a 0:30. Steep premiums are charged for ads promoting foreign products, from 52% to as much as 320% above local ad rates. Ad placement has been controlled through ad agencies.

AUDIENCE MEASUREMENT:

There is no transparent audience data available for assessing the reach and frequency of Burmese broadcast media. Ratings are, however, produced by Myanmar Media Research and Development Company (MMRD) and are available to subscribers. Satellite media are not tracked by this service; audience estimates tend to be based on the number of subscribing household multiplied by an estimated number of viewers per home.

Gallup recently measured the broadcast news audiences in Burma, including international sources such as RFA and VOA, and concluded that radio is the most dominant medium nationally and that, not surprisingly, television viewership is concentrated in Yangon and other urban areas. These data, however, are not commercial ratings data.

Print/Online News Media

Although the government reports that more than 200 weekly news journals are licensed in Burma, as well as more than 200 magazines, the majority are entertainment or sports-oriented; only a relatively small number are independent news journals and, until recently, have operated under censorship. They continue to operate in a constrained economic environment and under threat of reprisals.

It is an increasingly competitive market. International editions have entered the market. Thai publications are already available, and the Wall Street Journal and New York Times have partnered with a local publishing house to begin printing and distributing in the Yangon market; they are expected to compete for the English language and business audiences.

Political journals are also competing for share-of-mind and market: D Wave, the NLD publication and Unity, produced by the Shan National League for Democracy, target specific audiences with their viewpoints. All local journals have reported circulation gains since Aung San Suu Kyi's release and, while their circulation numbers are now somewhat lower than peak, all report that circulation has leveled off at a much higher level. Journals are still taxed on their circulation sales and, in this area as in others, the playing field is unfair. Independent publishers pay taxes while the list of top tax-payers fails to include their crony competitors.

While there are currently no private newspapers that publish daily, Yangon residents can purchase one or more general interest newspapers every week day. They are just published by different companies. Per-day circulation ranges from a low of 35,000 on Sunday to the combined circulation of 7 Day, Popular, Venus News and Modern that jointly exceed 300,000 on Thursday. A number of journals actually circulate on days preceding and following their actual registered publication date, blurring their official release date.

One could argue that in a city of approximately 4 million people, there is room for circulation to increase dramatically. In developed countries, aggregated newspaper penetration is typically in double digit percentages. Yet given the low purchasing

power of most residents and inefficient distribution networks, it is unclear what the real opportunity is for circulation growth or the support of multiple daily titles.

CONVERTING TO DAILY:

Seven significant newspapers have indicated a plan to move to a daily publishing cycle, but it is unclear at present whether that will be Monday-Friday or all seven days.

Based upon multiple interviews with editors-in-chief, going daily is seen as taking advantage of a unique legal opportunity; of finally being free to operate like more normal newspapers. They seek to get in first, gain audience, and grow the brand. However, for the most part, converting to the daily cycle is not being discussed in terms of being a business decision against which revenue and expense projections have been thoroughly considered.

This situation is not surprising. Many independent journals, previously the only form of independent media, had their genesis as organizations with clearly defined editorial missions but without business strategies. Many have been — and may still be - supported by the owners' other businesses or silent investors.

Yet experience shows that converting to daily is first and foremost a business decision rather than an editorial one. There needs to be a clear path to increasing revenues, and that clear path typically includes a substantial increase in advertising. For conversion to be successful, a newspaper must also expand its reach of advertiser-desired audiences and create environments to reach them.

> "Now we can report on anything … but the one thing we won't touch as a topic is taxation. That's a sure way to get a call from the tax collector. And the old practice of our advertisers being targeted by the tax office: still going strong!"
>
> *Independent newspaper editor-in-chief*

The distribution system that delivers most newspapers to street-side vendors may be one of the largest impediments to a successful implementation of daily publishing. That system, which is still dominated by one local company, remains a pressure point. Currently, it distributes most newspapers (with the exception of Eleven and 7 Day, which have developed their own in-house printing and distribution capabilities).

Currently, nearly all copies are sold at street stands. Those are cramped environments and publications are tiled on top of one another and displayed on boxes with a vendor passively accepting money but not making purchasing recommendations. It is unclear how this low-tech system will accommodate the rapid expansion of publications. Alternative distribution sites, such as convenience and grocery stores, are not common. There is no single copy merchandising or competitive display.

PRICING:

Advertising pricing remains basic among print journals. With the exception of Myanmar Times group, rate card pricing is done on a flat scale rather than a sliding scale (which would include rate incentives to increase the overall ad schedule). On a cost-per-thousand circulation (cpm) basis, a full page color ad in one of the major publications would range between 10,000 kyats to 22,875 kyats, before discounting.

And that discounting can be savage with lots of off-the-rate card negotiations. Moreover, as noted elsewhere in this report, ad agencies play a huge role as intermediaries between advertisers and publishers and often take a large share of the profits.

PRODUCTION LIMITATIONS:

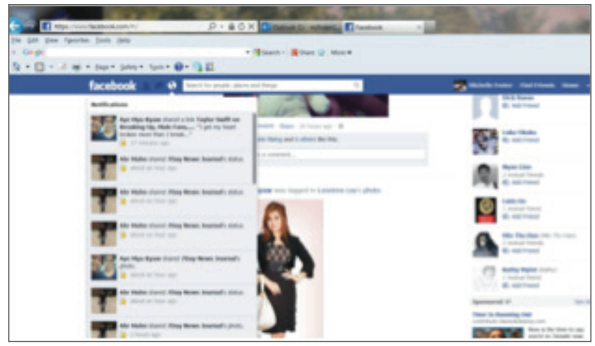
Newsprint is prohibitively expensive and publishers are already concerned there may not be enough supply to support all the journals that seek to go daily, particularly if the state increases distribution of its publications. Even absent that concern, there are real physical limitations on printing. Electricity is limited and expensive. In Yangon, the largest city, there is no guarantee of a stable 24-hour source of power. Maintaining and operating generators large enough to power presses is cost-prohibitive.

Those companies that do operate their own presses — even small computer-powered presses - keep them offsite as real estate in central Yangon is now priced too high for manufacturing facilities. Only Eleven Media houses its reporters and presses in the same facility.

Because internet bandwidth and connections are poor, sending press-ready pages to the printer online is unrealistic. For the same reason, CDs are burned and driven to Mandalay, delaying the production cycle. Even in Yangon, with its newly clogged streets, physically delivering the edition via CD to the printers is time-consuming and fraught with delays.

AUDIENCE MEASUREMENT:

Circulation data is unaudited and supplied by publishers. Based on conversations with newspaper executives, their rate card circulation numbers tend to be (but are not universally) inflated by around 5-10%. No audience measurement or assessment of news interests is available for print media. As a result, the value and demographics of a newspaper's audience, typically the basis for price negotiation and placement strategies, are not used in the selling process. This contributes to the vicious cycle of price discounting which erodes profitability.



Reporters and media are using Facebook as a real-time medium to augment weekly publishing cycles

Social Media and Mobile Phones as News Platforms

With internet access no longer tightly controlled, and mobile access expanding, social media sites — particularly Facebook — have taken off. Local journals have responded quickly to these changes. 7 Day, Eleven, Yangon Times, Myanmar Times, The Voice, Snapshot, Popular, The Messenger, Myanmar Post, Hot News all have both websites and Facebook pages (and the Facebook pages are far more dynamic than the journals' websites). Other journals maintain Facebook fan pages.

There are hundreds of Burmese journalists with Facebook accounts. It is impossible to keep up with their postings as they cover topics ranging from ethnic violence to government reform and civil unrest. Burmese audiences, whether local or international, comment voraciously. The key limitation on social media is now not censorship or blocking, but rather bandwidth. YouTube in particular is difficult to access because of poor connections.

At the same time, social media have also moved onto mobile platforms. The cost for mobile devices and access have both dropped dramatically and now 4G networks exist. Brisk sales of IPhones and clones are putting smart devices in the hands of users and reporters. Viber, a voice over internet provider is incredibly popular, and allows the quick sharing of news among Burmese reporters both inside and outside the country. The recent investigation into corruption by top officials within the Ministry of Telecommunications signals the government's desire to reform the sector and open it to foreign investment.

In-home use of the internet is also growing, and in October the government announced that it reduced the cost of high speed

There is an underlying reason that makes internet advertising difficult: Burma and North Korea are the only two countries in the world that lack a common Unicode language. Thus, their content cannot be reliably searched.

internet access from 600,000 kyats for installation to 50,000 kyats, and the monthly fee from 30,000 to 17,000 kyats.

Reporters and media are using Facebook as a real-time medium to augment weekly publishing cycles

Online and mobile ad revenue

As in print media, just because a news organization can create an audience, does not mean they can automatically monetize it. Facebook is not yet a revenue platform in Burma, nor are local media websites. Google, a prime source of ad revenue for publishers, is unavailable to them. That will change in time, but the groundwork should be laid now.

Currently, advertisers who place online ads get poor results due to the lack of search engine optimizable content, the content of the ads themselves and how they are structured and overall low internet penetration. There is an underlying reason that makes internet advertising difficult: Burma and North Korea are the only two countries in the world that lack a common Unicode language. Thus, their content cannot be reliably searched. Because of this, while access to the internet is growing in urban areas, there are difficulties for businesses, whether media or other organizations, to operate profitable websites.

Up to this point and due to the economic sanctions, there has been no Burmese search engine at Google: there is no Google.

co.mm. Baidu, the Chinese search engine, is also absent and does not index the Burmese web. Yet it is apparent Google is crawling all these websites. Google is indexing the Burmese web in the background; but at this point, it has not yet "opened the search engine." If one types in a Burmese headline into the English search engine, Burmese results are returned (although there are many flaws with the results).

Bottom line, it's hard to drive search engine traffic when it's not searchable. And if there is no Google or other major search engine, there are limited ways for Burmese businesses to make money from their sites.

The implication for local Burmese media is that in the near term, the way to develop local audiences on a locally-produced website would be through cross-promotion using the company's core media platform. If they wish to generate revenue from their sites, they must look both domestically and internationally, and produce content in languages (English, Thai) that can be searched.

4 LOOKING AHEAD

In the coming months, three major news events will challenge the Burmese media community and set de facto deadlines for improvements in news reporting and distribution: the SEA Games in December 2013, Myanmar's assumption of the ASEAN Chairmanship in March 2014 and the National elections in 2015.

Each of these has international impact and will require local journalists to deliver a higher standard of reporting. However, the ability of media houses to expand audiences through new channels offers no guaranteed parallel expansion of advertising revenues. Unintended consequences of the changes could be severe.

- Independent newspapers could face financial ruin as they increase reporting, production, newsprint and distribution costs to produce a daily product. Those most likely to have access to sustaining capital will be big businesses and/or cronies. The market will be skewed as state-owned dailies transform into public service media and compete with independent media for advertisers.

- New private broadcasters, with limited experience, will compete on an un-level playing field against state broadcasters; MRTV has more than 3,000 employees and the MOI in total is reported to have 8,000. The MOI has stated that it seeks to convert Myanmar Radio and Television (MRTV — its group of radio and television broadcasters) into public service media.
- Donor-funded exile media seeking to set up shop in Yangon lack experience operating commercially-funded programming and will compete against an energized VOA (Voice of America) and other international news agencies as well as local news media.
- Regional broadcasting groups, whether Burmese or Thai, will provide highly efficient advertising packages for global brand advertisers (the single largest segment of potential advertising growth), thus locking up market share and bypassing local news media — a phenomenon which in other parts of the world has left local news programming starved for revenue.
- The existing urban/rural divide will likely intensify as growth is concentrated in Yangon and Mandalay. Ethnic minorities and those living in remote, often conflict-torn areas

"I am worried that crony media and big business entertainment media will tie up all the revenue ... and that independent media will die not from censorship but from starvation."

Government Advisor

currently lack reliable access to news. Radio remains the dominant platform for reaching those under-served populations and, despite licenses being given to private FM broadcasters, remains closely-held by the state.

- The anticipated simultaneous granting of daily publishing licenses and expansion of television and radio licenses will put enormous and perhaps unsustainable pressure on limited reporting resources. This could create a crisis in reporting and challenge the viability of independent media as large media houses (whether owned by cronies or big businesses) attract journalists with higher pay and greater benefits. Although a number of print/internet journalists have been trained, there is a dearth of professional broadcast reporters. Already, large print journals have hired dozens of young workers and have begun giving them rudimentary training.

Will the media market survive these challenges? The answer is yes. The broader question is who will survive it, and how?

In an open market — even one with a robust advertising market where media houses are operated by excellent managers within a strongly supportive legal environment — there is no possibility that more than half a dozen newspapers would simultaneously convert from weekly to daily publication and succeed as financially independent entities.

Will the media market survive these challenges? The answer is yes. The broader question is who will survive it, and how?

Success is even less likely when faced with an increased presence of the three state-owned dailies, the rapid expansion of broadcast and satellite channels, the privatization of FM radio, the entry of former exile media, the conversion of state-owned media to public service models, and the increased access to local reporting through internet sources.

Paradoxically, independent media — now given unprecedented opportunities to report — may find themselves faced with unanticipated economic challenges. If democratic reforms are fully implemented and a middle class emerges, there should be a robust market for news media. That's a long-term view of the situation. But for independent news media to survive in the near-term there needs to be a level economic playing field.

5 RECOMMENDATIONS

The Media Environment

- **Create a legal environment that supports independent media businesses.** There are numerous examples of countries where the entire media environment is distorted by business practices: media and media intermediaries (such as ad agencies) are controlled by cronies, the state interferes in media markets through direct ownership of media and control of advertising, and where laws exist but there is no political will to enforce them.

  In Burma, the current Media Law provisions under consideration are most concretely focused on journalists and journalism, rather than establishing the legal protections and enabling environment for news media companies. Thus ongoing effort to support independent media houses must also focus on creating a business and market environment where media can succeed, compete on a level playing field, and operate under a fair and open taxation system that is equally applied to all players. Otherwise, even if there are press freedoms, there will not be a free press.

- **Ensure the transparent ownership of all media.** Laws can provide the semblance of transparency without ensuring it. In Burma, all media is currently licensed by the government. However, licensing is not the same as ownership registration, and does not necessarily lead to ownership transparency. Ownership may be opaquely concentrated in the hands of a few owners or off-shored. Thus, although there may be diverse and plural media sources, that is not an automatic quid pro quo for having robust local reporting. Registration processes should be established and enforced that require transparent ownership of media at all levels, with special consideration given to identifying offshore owners. Registrations should tie to people as well as corporations, to prevent a legal entity (such as a law firm or trust) from holding media without the individuals behind them being visible.

  For further insights, please refer to the author's report, Calling the Shots: How Ownership Structures Affect the Independence of News Media, http://cima.ned.org/publications/calling-shots-how-ownership-structures-affect-independence-news-media

- **Provide access to capital.** In a cash economy, those players with deep pockets are uniquely advantaged to have access to expensive presses, broadcast towers, and satellite time. For emerging independent news media organizations, having access to capital can put them into the game. Yet often times, the decision not to invest in media or supply capital is apolitical, it is a purely commercial decision. Media businesses typically do not own a lot of assets, cash flow is both cyclical and seasonal, and technological innovation can disrupt the underlying business model (witness: newspapers and the internet). Banks in emerging countries are already inclined to invest most heavily in large, stable businesses rather than small or mid-size companies.

  The Media Development Loan Fund (MDLF) is an example of a highly-effective organization that provides investment support to news media and should be looked at as an example. It provides affordable loans, equity investments, loan guarantees and technical assistance grants to independent media in countries where they are under threat. Using seed money, the organization has selectively invested in independent news media in Eastern Europe and around the world; during the last 16 years it has written off less than 3% of its total loans and investments.

  The author's interview with its CEO, Harlan Mandel, outlines the organization's approach to providing capital support. http://cima.ned.org/sites/default/files/Business%20Models%20QandA%20-%20updated.pdf

- **Implement transparent audience measurement.** When media audiences are fairly measured and data is openly available, media planners can base their advertising placement recommendations on it. This is particularly important when international advertisers will be placing ad schedules: they need more than just local recommendations to justify their expenditures. Without ratings or circulation or audience measurement, other factors are used to determine how to buy advertising. Common methods include money laundering, currying favor, rewarding cronies, and punishing media for their reporting.

Development and Training

- **Create a class of mid-level managers:** Develop business and management skills who can run successful and sustainable business operations. Three synergistic areas of focus should be addressed:
  - **Develop strong self-marketing and advertising practices among media.** Burmese media now have very limited experience in messaging, advertising, and brand development. These should be core competencies for media houses, particularly as most of their revenue derives from the sales of advertising.
  - **Produce a professional level sales curriculum.** Current sales practices are old-fashioned and not strategic. Training should focus on good sales management, creating a professional sales force, implementing internet-based methods of generating revenue, and using computer-based tools to maintain customer relationships.
  - **Generate financial templates and implement their use in media houses:** Most media houses lack sophisticated financial tools, including those that help track expenses, forecast revenues, and identify risk.
- Prepare media businesses for internet-based marketing. Train media on search engine optimization, creating multiple online audiences, and monetizing content.

i CIA *World Factbook*, Burma 2012
ii http://www.mizzima.com/business/7595-burmas-average-income-could-overtake-laos-cambodia-minister.html
iii http://adage.com/article/global-news/growth-marketing-follow-bric-road/231359/
iv Democratic Voice of Burma, *EU drops sanctions on Tay Za's son*, March 15, 2012, http://www.dvb.no/news/eu-drops-sanctions-on-tay-zas-son/20814
v *Media Use in Burma*, researched by the Gallup organization and published by the Broadcast Board of Governors, http://www.bbg.gov/press-release/bbg-gallup-issue-new-findings-on-media-use-in-burma/

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