MIDDLE EAST & NORTH AFRICA

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INTRODUCTION

I am pleased to introduce the 2008 Middle East and North Africa Media Sustainability Index (MSI). The MSI provides an analysis of the media environment in 19 countries of the Middle East during 2008. The MSI was first conceived in 2000 and launched in Europe and Eurasia in 2001, in cooperation with the United States Agency for International Development (USAID). Since that time, it has become a universally recognized reference for benchmarking and assessing changes in media systems across the Middle East, Africa, and Europe and Eurasia.

The MSI allows policymakers and implementers to analyze media systems and determine the areas in which media development assistance can improve citizens' access to news and information. Armed with knowledge, citizens can help improve the quality of governance through participatory and democratic mechanisms, and help government and civil society actors devise solutions to pervasive issues such as poverty, healthcare, conflict, and education.

The MSI also provides important information for the media and media advocates in each country and region. The MSI reflects the expert opinions of media professionals in each country and its results inform the media community, civil society, and governments of the strengths and weaknesses of the sector. IREX continues to encourage professionals in their vital efforts at developing independent and sustainable media in their own countries or, in many cases, preserving alternative voices in the face of repressive governments.

IREX would like to thank all those who contributed to the publication of the Media Sustainability Index 2008. Participants, moderators, authors, and observers for each country, listed after each chapter, provided the primary analysis for this project. At IREX, Leon Morse managed the MSI with editorial and administrative assistance from Dayna Kerecman Myers. USAID and the US State Department's MEPI program have been consistent supporters of the MSI, helping to develop the project and ensure its ongoing implementation. In particular, IREX would like to thank Mark Koenig at USAID and Saira Saeed at the US State Department for their invaluable guidance and support of the MENA MSI.

We hope you will find this report useful, and we welcome any feedback.

Sincerely,

W. Robert Pearson

President, IREX

Across the board, panelists participating in the MENA MSI study report an explosion of Internet usage in their countries in the past few years. The growing emergence of new media platforms in the region offers an alternative to traditional media, which often support the political party in power.

The 2008 Media Sustainability Index (MSI) for the Middle East and North Africa (MENA) is the third such annual study undertaken by IREX. With three years of data, one can begin to note trajectories in development toward sustainable independent media, as well as negative paths. Therefore, new in this edition, IREX includes a chart showing percent change since 2005, the first year of the study. The chart may be found at the end of the Executive Summary text.

Analyzing the percent change chart shows a mix of countries that have gained noticeably and regressed, along with several that have remained more or less static. Among the leaders, Libya stands out with an increase in excess of 100 percent. While this is a reflection of some important improvements, readers should also keep in mind the broader context of the situation facing Libya's media: in 2005 its overall score of 0.31 placed it at the bottom of all MENA countries by a wide margin. The changes that have helped to increase its score, while groundbreaking for the country, still leave the country with the lowest score in the region and well within the MSI scoring category of "unsustainable, anti-free press." Further, events that took place shortly after the MSI panel completed its work show that the improvements are fragile.

Iraq has also shown improvement since 2005, no doubt a reflection of the improving security situation and ability of media professionals to adapt to new freedoms. However, Iraq's overall score is still well shy of the "near sustainability" category. Likewise, Egypt has shown improvement, but these improvements have been highest in the areas of plurality of news sources, business management, and supporting institutions. Notably, there has been only minor improvement in the freedom of speech objective, which still falls short of "near sustainability."

Iran, Saudi Arabia, and Syria have all lost ground since 2005, although for different reasons. Saudi Arabia's score has fallen but still remains in the middle of the "unsustainable, mixed system" scoring category with an overall score of 1.50. The loss reflects increasing controls over new media technologies and failures of media professionals and others to push the envelope of media freedom. Iran has fallen close to the "unsustainable, anti-free press" threshold. Run-up to the 2009 elections saw more and more restrictive measures taken against outspoken media and other voices, and most notably the co-opting of the Association of Iranian Journalists. Syria has fallen into the "unsustainable, mixed system" category thanks to a regime increasingly unwilling to tolerate critical voices in the media and deteriorating professionalism.

EXECUTIVE SUMMARY

Also new in this edition is a separate study for the Kurdistan region of Iraq. Kurdistan is an integral territory of Iraq, but is subject to different laws, including those governing the media. Readers will note that separate scores for Kurdistan are recorded from 2005, the inception of the MENA MSI study. Published as a separate volume, IREX Europe (IREX's affiliate based in Lyon, France) prepared studies in 2005 and 2006/2007 of Iraq that included sub-national studies, including Kurdistan, as well as a national study. These were funded by UNESCO and may be found on IREX Europe's website (http://europe.irex. org/msi/2006.asp).

Our analysis herein is both quantitative and qualitative, but it is not intended to be exhaustive. The MSI is designed to serve as a summary of overall developments, and a starting point for further research by local media practitioners, international media development workers, academics, and others. IREX intends for the MSI results to serve as one tool in the diverse conversation about media development, and to support advocacy efforts aimed at improving the media's ability to inform the public in the countries under study. To that end, IREX provides all previous editions of the MSI and spreadsheets with combined scoring data on its website, www.irex.org/msi.

Increasing Reliance on New Media for News and Information

Across the board, panelists participating in the MENA MSI study report an explosion of Internet usage in their countries in the past few years. The growing emergence of new media platforms in the region offers an alternative to traditional media, which often support the political party in power. Such options are highly valuable for the many countries that lack pluralistic views in the traditional media, and where self-censorship impinges on the availability of news and information that citizens need in order to hold politicians accountable and make important life decisions.

Internet websites operated by media outlets are a key source of information throughout most of the region and they serve as an avenue to increase audience size. In Bahrain, one panelist reported that, "the maximum local newspaper circulation is estimated at 12,000 copies each," but that daily visitors to websites hosted by newspapers may reach 50,000. Internet usage is still limited by some factors such as income level and limited availability in rural areas. Panelists in Kurdistan reported that most citizens are unaware of the Internet and few rely on it for news and information. Further, quality of reporting is sometimes no better or worse than in other media; for example, in UAE panelists noted that some reporting on the Internet lacks objectivity, reliable sources, professionalism and, sometimes, credibility.

The Internet is still viewed as a safer space for reporting on issues that political authorities would prefer to bury, as reported in a number of country studies. For example, in UAE, panelists referred to a clash between tribespeople and a local government over an alleged land sale that was only covered by Internet media.

Use of the Internet allows media that face unfriendly circumstances to continue to operate when their traditional means of distribution are threatened or taken away by the state. It is also a way to avoid outright censorship. In Iran, reformist media increasingly rely on the Internet as their preferred way to reach their audiences. In Saudi Arabia, there are fewer restrictions on the Internet than on the printed press, radio, and local satellite channels; panelists pointed to the creation of websites that can report on security issues, normally off limits to other media.

Offshore news websites provide an alternative to official news sources in closed societies. Libya is a good example of this, with a number of websites operating from London and elsewhere. Libyan panelists pointed to the enormous benefits such sites offer, in particular providing citizens with alternatives to the official line and challenging official media to be more forthright. But, they noted that the audience able to access such news sources is limited. Offshore websites are increasingly being used by Iranians and Tunisians in exile as well.

The Internet is also a significant source of international news, including foreign perspectives about individual countries. The Algeria study notes that the high price of foreign print publications puts them out of the reach of most Algerians, but the Internet allows access to these sources of information. Access to international news and opinions helps, in a limited way, to undermine attempts by the state to control news and opinion.

Blogs and interactive websites such as message boards are providing the opportunity for an expanded group of citizens to become involved in discussions running the gamut from entertainment and sports to politics and religion. Panelists in UAE noted the anonymity of the Internet allows users to feel more comfortable than when using other media to address topics critically. The Jordan study notes an explosion of blogs and news websites that offer space for comments; these have become platforms for debate and comment, including assessments of the lower house of parliament's performance. However, panelists in Jordan cautioned that such debates sometimes turn into a "war of words." Egypt is a leader in the Arab world with 160,000 blogs, representing 30.7 percent of all Arab blogs. Panelists from Egypt report that some blogs have achieved such a level of professionalism that they have become trusted news sources and even scoop more traditional media in reporting some stories.

Other new technology platforms have shown their usefulness for disseminating news as well. For example, the Morocco study notes the use of YouTube to expose corruption among gendarmes. Use of SMS in some countries serves as a source of news, both formal use by the media and informally from person to person. In Kuwait, one panelist noted "When there is a secret meeting of the parliament or Council of Ministers, the entire country knows what happened before the meeting finishes, thanks to SMS." In Oman, media are using SMS as an additional revenue stream, by providing updates along with advertising.

In addition to serving as a resource for citizens to access news and share opinions, the Internet is becoming a tool for the media to advocate for themselves. In Egypt, for example, the Arab Network for Human Rights Information launched "Cases" (http://qadaya.net), a website that tracks human rights cases, including those related to freedom of the press, before the Egyptian courts.

However, the use of new media technologies, particularly websites, has caught the eye of regulators keen to limit content under a variety of pretenses, some noble, but many simply to protect "state unity," "national security," or similar concepts that, in the end, serve the interests of a ruling political party. In Egypt, a proposed bill calls for the establishment of a monitoring body, chaired by the minister of information and made up of representatives of the National Security Commission and the ministries of interior, foreign affairs, and culture. This body would monitor the content of all broadcasts and includes websites. Complaints have been made of Egyptian security forces monitoring users at Internet cafés. The UAE study notes the creation of an "Electronic Police" in Dubai to constantly monitor the Internet for possible criminal activity or anything deemed "out of bounds." In Syria, the government has ordered websites based there to provide the name of authors responsible for any article or comment posted.

Public Internet use is also increasingly regulated in the region. In Syria Internet café owners must now take down the names and check identification cards of visitors, as well as the times they arrive and leave. The records are to be presented regularly to the authorities. In Tunisia, Internet café owners may be held responsible for the actions of their customers; therefore owners may ask customers not to visit certain websites.

Targeted blocking is used by governments to suppress unwanted opinions or criticism. In countries such as Kuwait, the government asks Internet service providers to voluntarily block websites. Facebook and YouTube are blocked in Syria and Tunisia, and Syria also blocks sites where individuals can establish an online blog, such as Blogspot and Maktoobblog,

the largest Arabic blog site. In Saudi Arabia, some websites considered troublesome by the government are blocked, such as Al Wefaq, a top security news site. In UAE, panelists said Internet sites that publish well referenced and objective critical reports are more likely to be blocked by authorities.

Filtering is common in the region as a tool to implement restrictive policies, and most countries report some level of filtering. Tunisia uses SmartFilter software, but apparently prefers to hide this from the public, as a contrived error page is shown when a website being filtered is requested. Iran filters the Internet, but many citizens are able to circumvent the filters, a tactic reported in other country studies as well.

More seriously, bloggers may be subject to arrest, and as the Internet increases in reach, more and more reports of such arrests are reported in the Middle East. In Saudi Arabia, Fouad Farhan was detained for five months after criticizing economic and social conditions in his blog. In Syria, recent arrests of bloggers include a writer who highlighted fuel and electricity shortages, and a teacher from the farming province of Raqa who criticized patronage and nepotism in the state-run education system. Syrian blogger Tariq Biasi was sentenced to three years in prison in May 2008 for "weakening national sentiment." In Tunisia, Internet journalist Slim Boukhdhir is frequently in and out of jail.

New technologies have become an integral part of the media landscape throughout most of the Middle East, and likely the new platforms for sharing news and information will continue to grow in importance. As with any type of media, issues of sustainability (legal and regulatory environment, professional standards, business management environment) are important considerations when evaluating how well the media are performing their role as the fourth estate. The MSI methodology is designed to capture the performance of a country's media sector regardless of the specific nature of its prevailing platforms. The MSI will include the impact of current and yet-to-be-invented forms of media in future editions.

Iran Loses an Important Strength in Defense of Media Independence

One of the countries in this study that received a lot of attention in 2008 for its poor treatment of the media in the run-up to elections is Iran. Iran's overall score also received one of the most severe drops in this year's study. Iran's overall country scores from the past two years, 1.57 and 1.56, may have seemed higher than conventional wisdom would predict, given the nature of a theocratic government and the reality of the government's efforts to control public debate and curb freedom of the press. The results from 2006/2007 show Iran scoring somewhat higher than Algeria and Saudi Arabia, and only a little behind Bahrain and Oman.

What conventional wisdom likely missed was the lingering strength of Iran's civil society. In the context of the MSI study, this includes the various institutions supporting the media, such as the Association of Iranian Journalists (AoIJ) and university-level journalism education. These consistently received plaudits from those interviewed to complete the study. In a region where civil society overall is not generally allowed to flourish, traditions of civic participation in Iran created space for such institutions to operate with a modicum of freedom. In the 2006/2007 study, only Egypt, Lebanon, and Morocco scored higher than Iran's 2.05 in Objective 5, Supporting Institutions.

However, actions taken by the government in 2008 to bring AoIJ to heel succeeded in hamstringing this vital institution. The government cut its funding to AoIJ and declared it dissolved. The Ministry of Islamic Guidance and Culture

decreed that the media could not refer to the AoIJ as a means to squelching debate over its fate. In its place, the government created a new organization made up solely of journalists working for conservative media. As a result, Iran's score for Objective 5 this year fell to 1.36. Only four countries, Libya, Saudi Arabia, Syria, and Tunisia, scored lower.

Unfortunately, this development was the largest contributor to the severe unraveling of Iran's overall score. The recent history of the AoIJ serves as an example of the role that supporting institutions can play to serve media in the face of an unfriendly government, and how their absence or cooption allows governments to silence critical voices. Should the situation change in Iran, the experience of the AoIJ will help reignite a vibrant media. In the mean time, its absence will allow the government to control information to a greater degree than it was before AoIJ was closed down.

PERCENT CHANGE IN MSI 2005–2008: THE MIDDLE EAST AND NORTH AFRICA

Country	Percent
Libya	129
Iraq	39
Egypt	26
Iraq-Kurdistan	22
Algeria	16
UAE	12
Oman	4
Lebanon	1
Tunisia	1
Jordan	-3
Morocco	-3
Bahrain	-3
Yemen	-5
Kuwait	-6
Palestine	-16
Qatar	-17
Iran	-26
Saudi Arabia	-27
Syria	-27

COUNTRIES
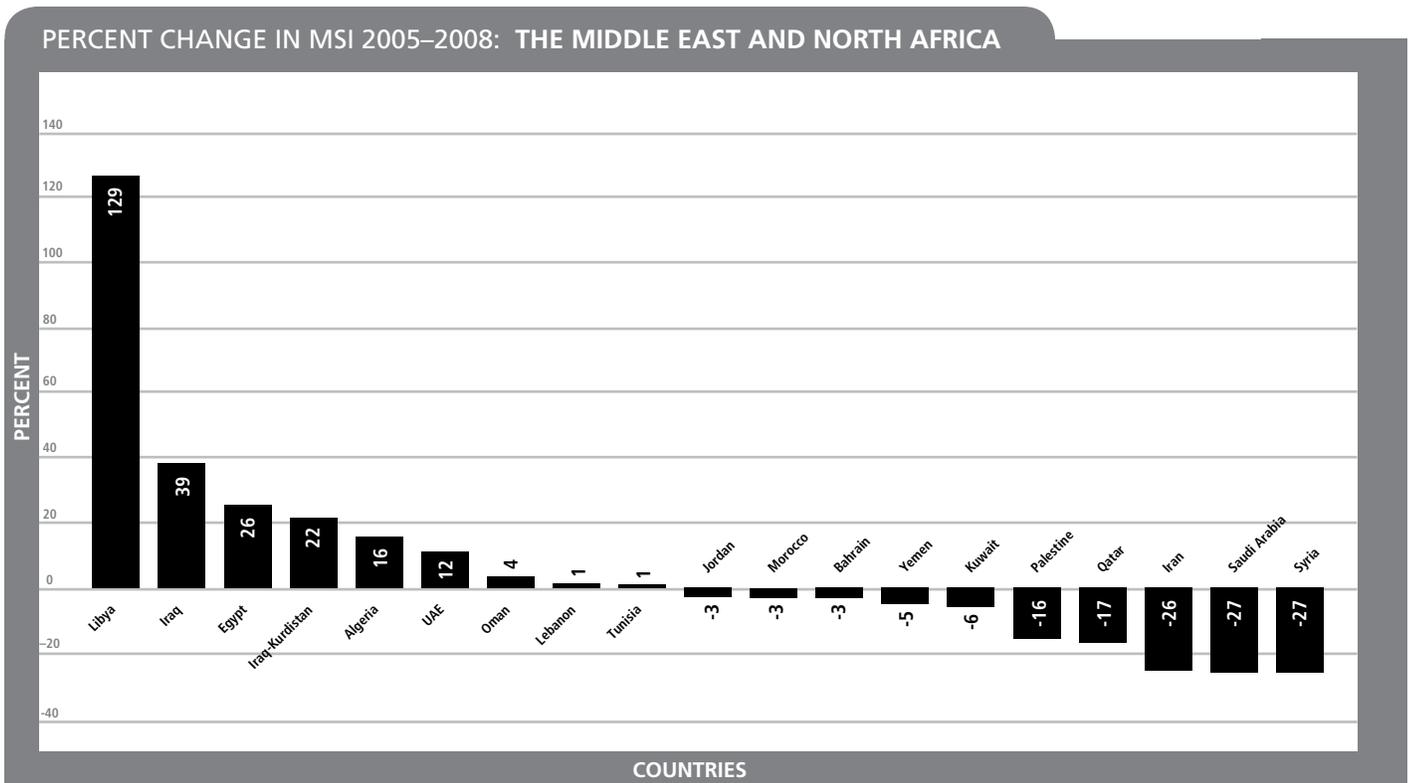
MEDIA SUSTAINABILITY INDEX 2008: **OVERALL AVERAGE SCORES**

0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00
			▲ Iraq **(1.61)**	▼ Qatar **(2.05)**			
			▲ Algeria **(1.63)**	▫ UAE **(2.08)**			
			▲ Bahrain **(1.76)**	▲ Jordan **(2.09)**			
			▫ Palestine **(1.76)**	▲ Kuwait **(2.17)**			
	▲ Libya **(0.72)**	▼ Iran **(1.16)**	▲ Iraq-Kurdistan **(1.80)**	▼ Lebanon **(2.19)**			
	▼ Syria **(0.79)**	▫ Yemen **(1.20)**	▲ Oman **(1.96)**	▲ Egypt **(2.37)**			
	▫ Tunisia **(0.98)**	▫ Saudi Arabia **(1.50)**	▫ Morocco **(1.98)**				

UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE	

MEDIA SUSTAINABILITY INDEX 2008: **FREEDOM OF SPEECH**

0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00
			▲ Iraq **(1.62)**				
			▼ Morocco **(1.72)**				
			▫ Iraq-Kurdistan **(1.78)**				
			▲ Bahrain **(1.82)**				
	▲ Libya **(0.65)**	▫ Yemen **(1.05)**	▫ Egypt **(1.88)**	▫ Lebanon **(2.17)**			
	▼ Syria **(0.65)**	▼ Saudi Arabia **(1.22)**	▫ UAE **(1.89)**	▲ Kuwait **(2.25)**			
	▲ Tunisia **(0.90)**	▲ Algeria **(1.42)**	▲ Jordan **(1.90)**	▼ Qatar **(2.37)**			
	▼ Iran **(0.94)**	▼ Palestine **(1.57)**	▫ Oman **(1.92)**				

UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE	

CHANGE SINCE 2006/2007
▲ (increase greater than .10)   ▫ (little or no change)   ▼ (decrease greater than .10)

Annual scores for 2005 through 2006/2007 are available online at http://www.irex.org/programs/MSI_MENA/index.asp

MEDIA SUSTAINABILITY INDEX 2008: **PROFESSIONAL JOURNALISM**

0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00
				▲ Morocco **(2.02)**			
				▼ Egypt **(2.06)**			
			▲ Iraq **(1.61)**	⬜ Jordan **(2.08)**			
			⬜ Bahrain **(1.62)**	▼ Lebanon **(2.13)**			
		▲ Libya **(1.09)**	⬜ Iraq-Kurdistan **(1.72)**	▼ Kuwait **(2.17)**			
		▼ Syria **(1.10)**	▲ Algeria **(1.78)**	▲ Oman **(2.17)**			
		⬜ Iran **(1.44)**	▲ Palestine **(1.80)**	⬜ UAE **(2.20)**			
	⬜ Tunisia **(0.92)**	▼ Yemen **(1.44)**	▲ Saudi Arabia **(1.97)**	▼ Qatar **(2.31)**			

| UNSUSTAINABLE ANTI-FREE PRESS | | UNSUSTAINABLE MIXED SYSTEM | | NEAR SUSTAINABILITY | | SUSTAINABLE | |

MEDIA SUSTAINABILITY INDEX 2008: **PLURALITY OF NEWS SOURCES**

0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00
			▲ Algeria **(1.80)**				
	▼ Syria **(0.80)**		▲ Oman **(1.88)**	▼ Qatar **(2.02)**			
	⬜ Yemen **(0.81)**		▲ Bahrain **(1.92)**	⬜ Jordan **(2.06)**			
	▲ Libya **(0.81)**		▲ Iraq **(1.93)**	⬜ UAE **(2.07)**			
	▲ Tunisia **(0.86)**		▼ Palestine **(1.93)**	▲ Iraq-Kurdistan **(2.11)**	▼ Lebanon **(2.51)**		
	▼ Iran **(1.00)**	▼ Saudi Arabia **(1.01)**	▲ Morocco **(1.97)**	▲ Kuwait **(2.45)**	▲ Egypt **(2.69)**		

| UNSUSTAINABLE ANTI-FREE PRESS | | UNSUSTAINABLE MIXED SYSTEM | | NEAR SUSTAINABILITY | | SUSTAINABLE | |

CHANGE SINCE 2006/2007

▲ (increase greater than .10)   ⬜ (little or no change)   ▼ (decrease greater than .10)

Annual scores for 2005 through 2006/2007 are available online at http://www.irex.org/programs/MSI_MENA/index.asp

MEDIA SUSTAINABILITY INDEX 2008: **BUSINESS MANAGEMENT**

0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00
			⬜ Algeria **(1.53)**				
		⬜ Yemen **(1.02)**	▼ Palestine **(1.60)**	▲ Oman **(2.05)**			
		▼ Iran **(1.07)**	▼ Bahrain **(1.74)**	▼ Lebanon **(2.07)**			
		⬜ Tunisia **(1.17)**	▲ Morocco **(1.91)**	▼ Qatar **(2.09)**			
		▲ Iraq **(1.25)**	▲ Jordan **(2.00)**	▼ Kuwait **(2.39)**			
▲ Libya **(0.35)**	▼ Syria **(0.71)**	▲ Iraq-Kurdistan **(1.48)**	▲ Saudi Arabia **(2.00)**	⬜ UAE **(2.48)**	▲ Egypt **(2.68)**		

| UNSUSTAINABLE ANTI-FREE PRESS | | UNSUSTAINABLE MIXED SYSTEM | | NEAR SUSTAINABILITY | | SUSTAINABLE | |

MEDIA SUSTAINABILITY INDEX 2008: **SUPPORTING INSTITUTIONS**

0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00
			▲ Kuwait **(1.57)**				
			⬜ Algeria **(1.60)**				
			▲ Iraq **(1.61)**				
			▲ Yemen **(1.69)**				
			⬜ Bahrain **(1.71)**				
		⬜ Tunisia **(1.05)**	⬜ UAE **(1.76)**				
		▲ Saudi Arabia **(1.29)**	▲ Oman **(1.77)**	▼ Lebanon **(2.09)**			
▼ Syria **(0.70)**	▼ Iran **(1.36)**	▼ Palestine **(1.89)**	⬜ Morocco **(2.29)**				
▲ Libya **(0.73)**	▼ Qatar **(1.47)**	▲ Iraq-Kurdistan **(1.92)**	▲ Jordan **(2.42)**	▲ Egypt **(2.53)**			

| UNSUSTAINABLE ANTI-FREE PRESS | | UNSUSTAINABLE MIXED SYSTEM | | NEAR SUSTAINABILITY | | SUSTAINABLE | |

CHANGE SINCE 2006/2007
▲ (increase greater than .10)   ⬜ (little or no change)   ▼ (decrease greater than .10)

Annual scores for 2005 through 2006/2007 are available online at http://www.irex.org/programs/MSI_MENA/index.asp