

NEWS MEDIA

EVOLUTION, ISSUES AND THE POLITICAL ECONOMY

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PIDE Policy & Research is a guide to policy making and research. Each issue focuses on a particular theme, but also provides a general insight into the Pakistani economy, identifies key areas of concern for policy-makers, and suggests policy action. The publication offers a quick orbit of the country's economy and is a hands-on and precise go-to document for the policymaker, businessperson, academic, researcher, or student who seeks to remain updated and informed. This issue is themed around PIDE's recent research efforts regarding the diagnostic of growth. We welcome contributions from within PIDE as well as from any external contributors.

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policy@pide.org.pk

Managing Editor

Pervez Tahir

Associate Editor

Fizzah Khalid Butt

Founders

Nadeem ul Haque

Durr-e-Nayab

Design

Muhammad Ahsan Zeb

Fiza Zia ul Hannan

Contributing Editors

Mohammad Shaaf

Saddam Hussein

Nazam Maqbool

Hamayun Khan

Team Monthly Roundup

Saddam Hussein

Abbas T. Moosvi

Obaid Khan

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Editorial



Pervaiz Tahir

The presence of relatively free media has changed lives mostly for the better. Media has played an important role in connecting the world even before internet. Today information travels faster due to the availability of numerous independent television channels. Due to its reach and real time information sharing, the electronic media has the major piece of the pie when it comes to impacting people. At PIDE, we try to understand and look at different perspectives of different phenomenon and bring new perspectives for our readers. We have devoted this issue to the political economy of news media.

In the main, this P&R talks about the influence of news media on our lives through its power to drive the narrative on the issues of public concern. We focus on the evolution of news media in Pakistan, analyze the way news programs are conducted, the ethics of media professionals individually and news media in general, the role of the government and state institutions in nurturing or suppressing freedom of expression while also assessing whether media hides behind this fundamental right to feed fake news. In other pages, senior anchorperson and journalists are, for a change, on the other side of the table, facing probing questions without any shouting match. Business models of media houses are assessed by trained economic analysts. Last, but not the least, the future of media in the wake of the rise and rise of digital journalism and the likely response of electronic and print media.

Although it has given an advantage of keeping the information alive and keeping people up to date, do you think it has also misused its capacity to play with the minds of people? Is the recent legislation proposed by the government aims to do just that – more? We hope you have fun reading this informative (literally) issue on news media and give us your feedback at policy@pide.org.pk.

Happy Reading



Mohammad Malick

Senior journalist and anchorperson

What do you think is the role of PEMRA in media? Do they give proper guidelines regarding the functioning of news and talk shows? Are they sometimes overindulging in the media house business?

PEMRA was supposed to be a regulating authority. Its main purpose was to come up with rules and regulations and monitor Tv channels just like Ofcom in the UK. However, In Pakistan PEMRA is not independent at all, rather it seems like an arm of the executive which seems to function just for the government. I believe that they have a capacity issue as well, but the bigger issue at hand is independence. I have

not seen PEMRA contribute positively to media development in Pakistan. Ofcom in the UK has extremely strict policies regarding monitoring and regulations in general and if any news channel deviates from it, that channel is sued. This is an enormous difference between both regulatory authorities. PEMRA on the other hand depends on the government and I do not see it developing as long as it is not independent.

Do you believe that extreme dependence on government affects the quality and working of PEMRA?

We have this naïve concept that a regulator is always going to reprimand or create hurdles in the broadcasting of shows. The job of the regulator in an industry is to regulate, and this does not mean that it has only one client. We as journalists also need protection and I believe that this is the duty of PEMRA. Sadly, PEMRA is more of a penalizing authority rather than a regulator and we are not seeing the support that we should be getting from them. It is suffocating the

media industry. Recently, I was served a notice by PEMRA for spreading fake news regarding the schemes and changes introduced by the government. PEMRA is not even sure what is fake news and what is political development news. They believe that if you criticize the government, you are attacking the national interest. We as news journalists have our freedom of speech and independence. Through PEMRA they are trying to silence and coerce the media.

Do you believe that our National Interest is so weak that it can be coerced by PEMRA?

It depends on how we define National interest. National interest is a very subjective term and means different to different people. To define and understand it, we need to be aware of the context in which we are using it. National interests change over time, and it is an evolving

term. They are different from what they were 10 years ago. Yes, we can say that national interest is the interest of the nation as a whole, but it can change. National interest in no way means conformity and silence. People have greatly misused this term.

Generally, there is always a person from a specific media house in the media team of the government. Does that influence PEMRA's bias in favor of one media house and against another media house?

The bias from the side of government towards different media channels is somewhat understandable to an extent. PEMRA should not be related to this in any way. It should work as an independent regulatory authority. Unfortunately, in Pakistan, if you are liked by the government you are liked by PEMRA. There should be checks and balances on PEMRA as well. There should be an independent board, independent financing, and funding's for PEMRA. When you rely on the Government for your sustenance and working

you cannot function independently. It becomes impossible. In Pakistan, we have become very polarized as a society. We do not have political parties rather we have personality cults. PTI means Imran khan, PMLN means Nawaz sharif, etc. Democracy is ruthlessly abused here. Parties do not foster the concept of freedom of speech and when these same people come to power the same exploitation and suppression of freedom are carried out.

Do you think that media is giving opposition more space? Because usually in talk shows etc. we can see that they present better views as compared to the party in power?

When you are in the opposition, you can afford to speak the truth. However, this is not the case with the party in power. I do not think that media always supports the opposition, but this has

been commonly thought of all around the world. The guns will always be focused on the people in authority, and they will always be questioned more.

I have a similar question regarding the issue discussed in the above question, sometimes during the speeches of the National assembly, some speeches are completely censored by certain news channels. Is that done by the media house or PEMRA?

: This is done by the media house. Two-three things need to be pointed out in this regard. Certain things are not allowed to be discussed easily, for example, Army, history, etc. I believe that times have changed a lot now. Five years back we were not given the freedom that we are

given now to discuss certain topics. PEMRA does have some legal regulations that news channels have to follow. For example, you cannot show vulgar language on Television. So, most TV channels play it safe.

Do you believe in the Political autonomy of the Media houses?

Media is a full-fledged power play now. One of the leading channels was working for hand in glove with the Nawaz government. Now another news channel is playing the same role that the previous channel played with the present government. When you involve yourself in such

games then you have to bear the negative consequences that come with it. I do believe that there is an abuse of power by the media, and it has become immensely powerful over the years.

This is a general observation, but when we have to see a neutral point of view, we switch to your channel or two or three other channels. Do you think that the freedom that the two leading rival news channels have, is troublesome?

The best thing about media is the power of the remote. You switch to a different channel if you do not find the one you are watching credible. All media houses are family-owned enterprises. The offices are owned by family members. Over the years they have lost their credibility. News channels do not have proper professionals and skilled workers. There is a tussle going on between

the news management the higher management and between the higher management and the government. A lot of our flaws have stemmed from sub-standard professional training. People are not aware that the kind of work they are doing is not ethically correct or illegal. This causes immense problems.

So, there should be an autonomous body like PEMRA that should monitor everything?

Yes absolutely, but then again if regulatory authorities are not properly functioning in third world countries, they can become extremely autocratic. They become the center of abuse. In Pakistan, we have seen the blatant abuse

of Suo-moto, people have forgotten that you cannot use it for every single issue at hand. It is important for the regulatory authorities that they confine to their agendas.

Does any international regulatory model comes into your mind which PEMRA should follow?

I talked about Ofcom UK, and I believe it can serve as a model for our regulatory authorities. I along with several journalists came up with a code of conduct a few years ago. We took the models of around 8-10 countries to develop a code of conduct for regulatory authorities. However, this idea was not further supported as the government wanted an upper hand in this as well. If the government will think of the media as an adversary, then they are not going to support it. It is high time that government understands that this is not an adversarial relationship. Technically, the government and media both represent the people, but it is hard to understand why a conflict between both is there.

Do you think that media houses spread narratives?

Yes, I do believe they do either for TRP or in general. Sadly, the shows that I do that talk about the interests of People like the economy, population boom, etc. receive a zero-rating. The shows broadcasting fights and drama receive maximum ratings. This is a fault in society. Journalists whose careers are based on these ratings are going to do controversial shows. I being a senior journalist can get away with it, but a young journalist is not going to jeopardize his career.

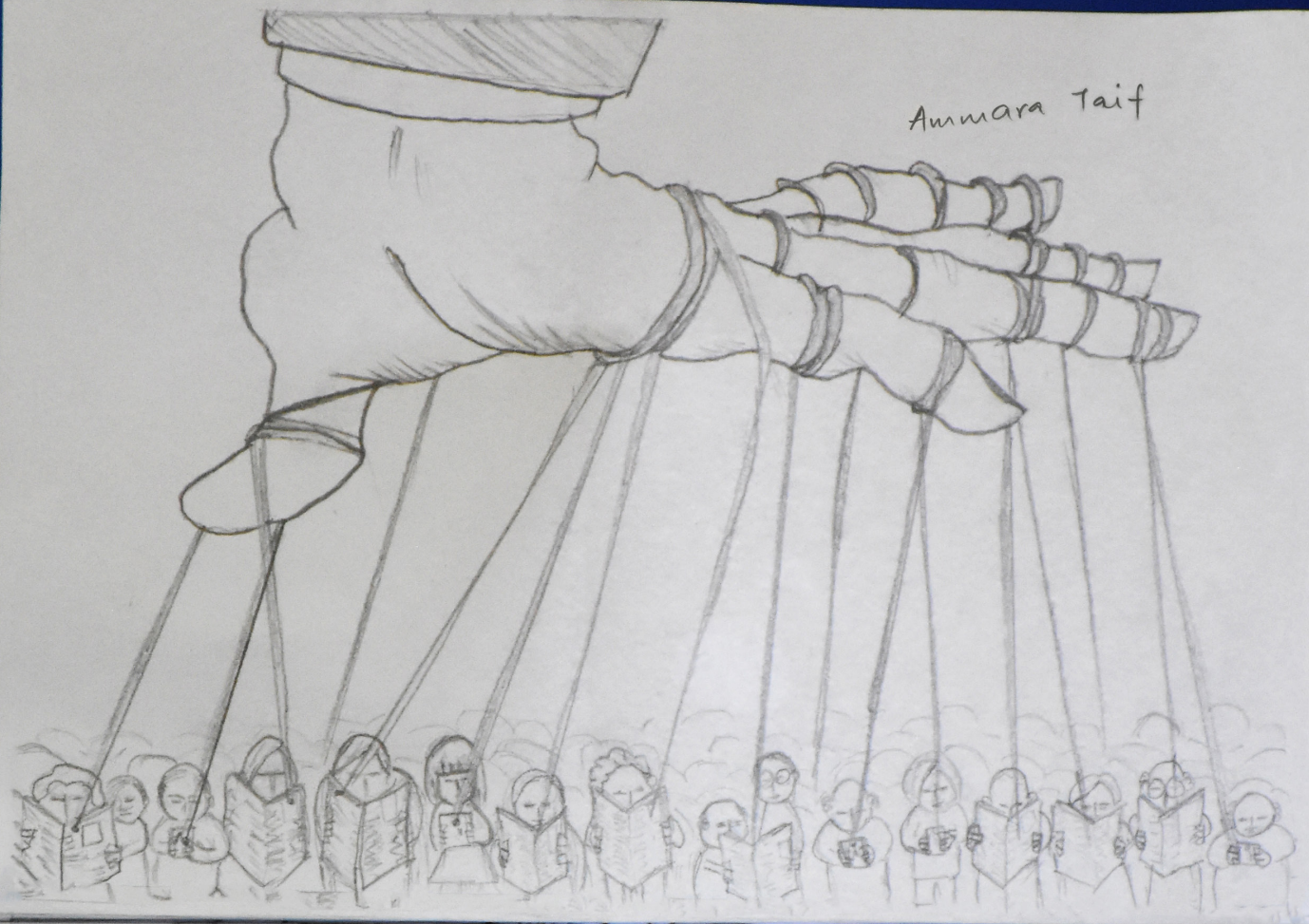
Is there an alternative to the TRP system in the world?

Yes, I do believe there is, but this is a long debate of impact vs eyeballs. All of these things require resources and money. PEMRA should be focusing on these things. PEMRA should carry out proper research regarding this and let news channels know what sort of content people are interested in or they can benefit from. They should be encouraging the news anchors and journalists to speak up about real and critical issues.

Do you think that social media is an alternative to it?

No, social media comes with a responsibility. It is impacting journalism in an effective way as well, by increasing our sources of information. We carry out fact verification of that information and then broadcast it, we can also debunk the myths regarding certain news that is shown on social media. I do not believe that social media has killed print media. When the radio was invented people claimed that now print media will die gradually. The print has never died, but with time print has transformed into digital print. The mediums of information have changed from newspaper to a mobile phone, but it is very much still there. Print gives you a thorough breakdown of information that a normal news bulletin or a talk show cannot. The role has changed but the impact is still there it is simply different than what it used to be.





The Electronic Media Economy in Pakistan

Nazam Maqbool
Economist/Social Scientist RASTA, PIDE

The influence of media on society is unquestioned. Its reach penetrates nearly every corner of the world and every aspect of life. But it has also been a contested realm, embodying class politics and the interests of monopoly capital. The paper aims to study various features of the electronic media industries and their practices. It primarily focuses on media ownership patterns, institutional structures, and business operations. It also talks about the way government regulations shape such matters and the impact on media content, media audiences and politics.

1. The electronic media market

a. The size and growth of the electronic media market

For years, Pakistan's state-run PTV dominated the television media environment. In 2002, the country experienced a proliferation of private cable and satellite TV outlets. Since then, the Pakistani media scenario has become very dynamic and has witnessed the most robust growth. Today, Pakistan boasts 88 Satellite TV Channels, 4,060 cable operators, and 35 landing TV Channels from abroad like BBC, CNN etc. Total TV viewership is 144 million, out of which 44 million are terrestrial while 96 million are cable and satellite viewership. At least 30 private TV channels, prominent among them Geo News, Dawn News, Aaj TV, ARY News, Capital TV, Samaa, Dunya News, Waqt News, and Express-News, exclusively broadcast news and current affairs programmes. The number of journalists in the same period ballooned from about 2,000 to over 20,000. Overall, the number of people associated with the media industry reached around 300,000. There had been a cumulative investment of US\$4-5 billion in the electronic media industry in Pakistan between 2002 and 2018. Moreover, new licenses issued by the PEMRA would inject investment of approximately \$2-\$3 billion. In the country, 70% of people own TV, with 100 million young and adult people watching 120 minutes every

day, a shift from 240 minutes per day in one decade. Among watched content, 70 percent of the content is entertainment, while 19 percent is news. This expansion in the media industry is attributed to improving economic fundamentals, an increase in per capita income, a rise in the consumer economy and an expanding advertising sector.

Many print media organizations operating before 2002 expanded to include TV news platforms. Almost all TV news channels maintain their websites, which contain news coverage from their platforms. Viewership of media in Pakistan is concentrated to 4% in Newspaper, TV media, radio and news websites and few owners control the market, have cross Media ownership and hence thought control is possible in Pakistan. 80% of the market players who do not have viewership are surviving despite the market conditions. The media boom had benefited a particular class of journalists, mainly TV hosts, who earned huge salaries and attracted thousands of young people to the profession of journalism. Dozens of universities established media science departments since 2005 to cope with the needs of the then-booming media industry. However, the second half of 2018 brought bad news. The media

industry started to decline. According to the Pakistan Federal Union of Journalists, at least 7,500 journalists and associated media employees have lost their jobs over the last two years. While almost every organization has scaled back operations, more than two dozen publications and two TV channels have closed. Several outlets shut down, such as Waqt TV and the bureau offices of several TV and print media outlets in Peshawar, Quetta and Multan. Partly affected by the outcome of the July 2018 elections and by an ailing economy coupled with the withdrawal of government subsidies and dwindling advertising revenue, even large and stable media groups were forced to shutter their publications and sack journalists. The Jang Group – the largest media group – shut down three of its publications and two bureau offices, leaving more than 900 journalists and related staff jobless in one single day. Apart from cutting the salaries of workers by 15 to 35 percent in recent months, the Express Media Group and Dunya Media Group also laid off over 200 journalists. Pay cuts are rife now, and even traditionally steady employers such as the Dawn Media Group induced pay cuts. Herald, an icon of Pakistani journalism, has just produced its last edition.

b. The concentration of media ownership and audience

News media concentration in Pakistan, in terms of both ownership and audience share, is very high. It, as a result, restricts sources of information available

to the public, thereby limiting news-and-opinion diversity and pluralism in the country's media landscape. Each of the top four television channels,

radio stations, newspapers and news websites cover over 50 percent of the entire audience share. The audience share for the top 4 news TV channels in

Pakistan (Geo News 24 percent, ARY News 12 percent, PTV News 11 percent and Samaa TV 7 percent) at the end of 2018 was 68.3 percent (total top 10 TV audience share percentage of 79 percent used as the 100 percent benchmark).

The top 8 owners (Jang Group, ARY Group, Express Group, the Government Group, Nawa-i-Waqt Group, Samaa Group, Dawn Group and Dunya Group) reach 68 percent of audience share across television, radio, print and online. All of them have a significant presence in more

c. Media content

The debates and contents play an important role in how things are perceived, how people, policies, happenings, events, and changes are described, and whether they should be accepted or rejected by those who matter.

In the ten analyzed talk shows during January 2021, PTI had the highest representation (42 percent), followed by PML (34 percent), PPP (20 percent) and JUF (3 percent). The topic most discussed was 'Politics' (72 percent), followed by 'Health' (4 percent), 'Terrorism' (3 percent), 'Economy' (2 percent), 'Education' (2 percent) and 'Sports' (2 percent). The dominance of

4. Television rating points (TRP) system

TRP or TAM (Television Audience Measurement) helps advertisers to select the suitable media at the right time. Five companies are licensed to conduct the electronic media rating business in the country. At the centre of Pakistan's rating system is Medialogic, a company that calculates overall TRPs daily using peoples' meters. It transfers this information to PEMRA (after Supreme Court's decision in 2018), who then reassesses and releases it. Meters are currently set up in over 30 cities across Pakistan in selected 2,000 households, assessing the viewership patterns by age, gender, time and other demographic—allowing advertisers to optimize their buying of media. The sample size is just 2,000 households to represent the whole population, and hence an absurd system/method is adopted for media ratings. The rating observed is used to award advertisements to the channels.

The rating system is complex and lacks a proper and transparent mechanism. Government (after Supreme Court's verdict in 2018 and

than one media sector.

In terms of audience share, the Jang Group, the largest cross-media owner, controls over a third of the market among the top 40 media entities. TV and online media outlets are the most prone (7 of 8 media groups) to cross-media ownership. The government is among the top three cross-media owners (Pakistan Television Corporation PTV, Pakistan Broadcasting Corporation PBC and the FM 101 stations).

politics at the cost of issues such as Health, Economy and Society, in general, is the source of concern. Of the ten analyzed talk shows, the percentage share of host speaking average time was 42 percent. It paints a bleak picture for giving time to guest speakers and anchor, hijacking the contents rather than being a regulator of the programme content.

Subject specialists lack in TV debates. It should be 80 percent analysts and 20 percent politicians or spokesmen of political parties, which is the rule followed by well-reputed news channels like BBC and CNN.

PEMRA's Television Audience Measurement Rating Services Regulations in 2018) is now in control of rating and thus plays a crucial role, marking a question on the independence of rating agencies.

Second, rating systems operate just like a mafia in which big players set the stage, lacking reasoning. The business model of rating companies is dependent on media houses that depend on the advertisers. The model has resulted in the monopoly of advertisers under the name Pakistan advertiser society. This society bounds the members to buy ratings from the approved rating company. Third, ratings are just representations of urban Pakistan while it excludes rural areas, resulting in a disproportionate coverage of rural issues.

Fourth, cable operators can also exploit by placing a channel far below so that it gets watched less frequently. There have also been occasional rumours of channels 'buying out' or owning the cable operations to generate higher ratings.

Fifth, in 2015, a back and forth spat of MediaLogic with the Express Media Group had involved accusations of bribery, kidnapping, extortion and a plethora of unethical behaviours. A report in Aurora magazine says that there is “a serious trust deficit in people-meters and MediaLogic. The bulk of the controversy is related to two issues: erratic spikes and drops in ratings which have led people to believe that certain channels may be ‘buying’ the ratings; and the delay in the delivery of data (Medialogic delivers the data with a one-day time lag) leading to the conclusion that it might be doctored.” Despite all this, the company continues to hold a virtual monopoly on the TAM services business – something it claims is a good thing that encourages a uniform ‘data currency’.

2. The media and the advertising market

The media industry advertisement has seen double-digit growth since the early 2000s in Pakistan. However, in 2018 it went through an 11 percent decline in revenue. While such a trend was expected after around 20 years of steady growth, the decision to reduce the public sector advertising budget appears to be the main trigger. Pakistan’s electronic media is reliant on the public sector and commercial advertisement revenues for sustenance. The television industry gets nothing from distributors. Whatever little fee consumers pay to watch more than TV channels at home goes to the distributors instead of content producers. Cable operators collect around Rs. 60 billion annually as ‘subscription’ without a penny paying to the TV broadcasters. The government uses the public sector advertisement (contributing 22–23 percent to the total media revenue) to impose its agenda on the media,” asserts Adnan Rehmat, an Islamabad-based media analyst.

Advertising expenditure in the country’s media industry increased at an annual rate of 23 percent between FY2002 and FY2011. From 32 billion rupees in FY2011, it reached a peak of Rs87.7 billion in FY2017 and then declined continuously to Rs. 58.6 billion in FY2020. The share of TV channels in total media advertisement revenues also decreased from 58 percent (Rs. 18.6 billion) in FY2011 to 44.4 percent (Rs.26 billion) in FY2020. The rest goes to the digital formats, print, radio, Out of Home (OOH), etc. A rapid expansion in the media industry has created intense competition for ad revenues, compromising its independence against political powers and corporations. The rise of digital media has diverted advertisement from conventional TV and print media.

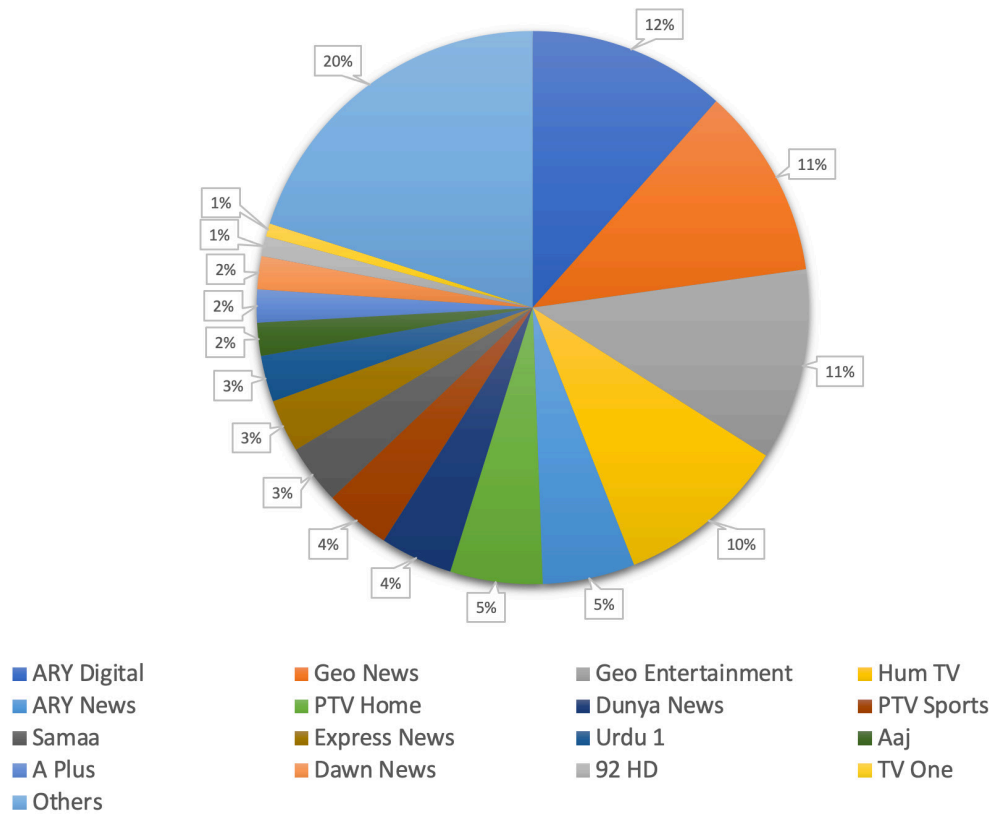
Based on their popularity among viewers, the top six channels grabbed 55 percent of the total television advertising spend in FY2020. ARY Digital, Geo News, Geo Entertainment and Hum TV topped the industry, each having over 10 percent share followed by ARY News and PTV News with over 5.5 percent share each, and Dunya News and PTV Sports with around four percent each. The state television network, PTV, is directly subsidised through a ‘television fee’ addendum to every electricity bill in the country.

According to Aurora figures, of the top 10 advertisers (as product category) of TV media in 2017–18, the private sector, particularly the consumer goods and telecom industries, dominated both the news channels and the non-news channels.

Government advertising accounts for a significant proportion of total advertising spend in the country. News media channels have often decried the use of government advertisement as leverage and the withdrawal of ads as a tool to punish unfavourable coverage. Government ad expenditures are more important for smaller channels, especially the ones in regional languages. As a result, many media outlets avoid negating politicians, particularly at the provincial level, due to fear of losing advertising revenue.

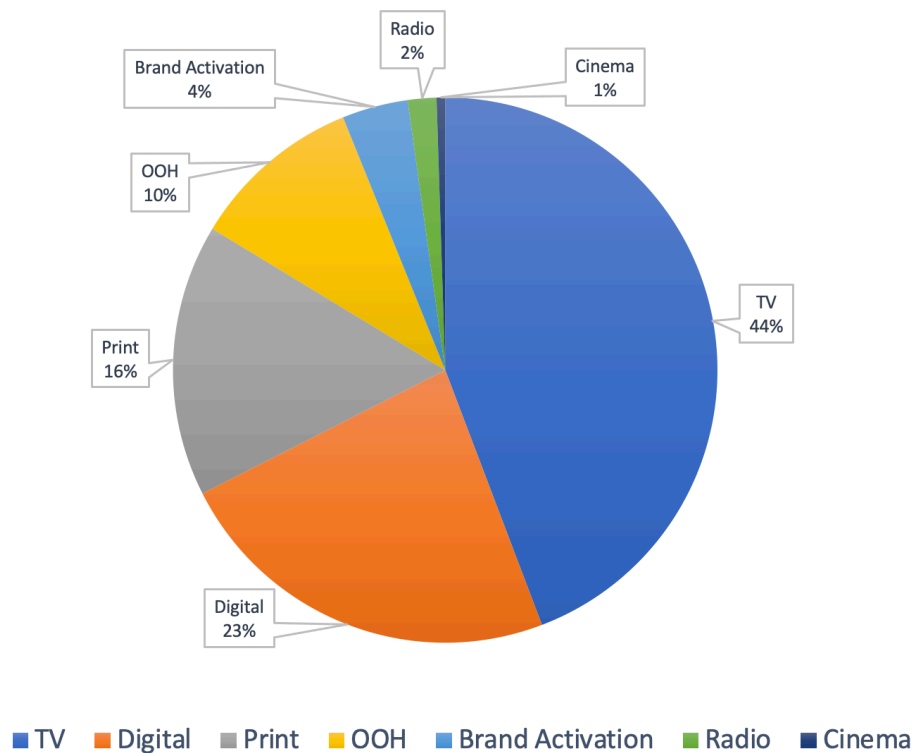
A slowing economy and declining money flow alone do not explain the media’s financial crisis. “The crisis is closely entwined with politics. The collapsing media economy is in a key part also the result of the overall shrinking space for media being engineered as part of the censorship of political dissent”. One of the main characteristics of the current government is the continual suppression of media, the intimidation of journalists, the shutting down of TV channels, restrictions on live coverage of opposition leaders, crackdowns on online freedom of expression and the use of procedural mechanisms to impose widespread censorship.

Fig: Media spending in Pakistan electronic media, FY2020



Source: Aurora, Magazine 2020.

Fig: Media spending in Pakistan electronic media, FY2020



Source: Aurora, Magazine 2020.

3. The regulatory and legal framework of the media economy

Besides a slash in government ad expenditures, the country's regulatory system is also responsible for the media's recent crisis. There is an absence of a modern regulatory framework that adequately covers audience share, circulation, revenue, distribution of share capital or voting rights, etc. It restricts diversity in ownership and opens it to political vulnerabilities and potential manipulation of the media market. PEMRA is primarily a market regulatory authority. Its mandate was to expand the media market economy by discouraging media cartels, creating a fair and competitive environment, minimizing entry and exit barriers and providing a level playing field for all (big and small) players. However, instead of regulating the market, PEMRA is focused on content regulation and management and be a censor-board. The regulation infrastructure by default has resulted in the concentration of the media market. Until 2007, print media owners could not own electronic media due to a ban on cross-ownership. However, the removal of this ban in 2007 (PEMRA Amendment Act 2007) resulted in an undue concentration of audience and ad revenue in the media.

The structure of PEMRA also does not let the media industry generate revenue and hence become independent. Almost all of the electronic media revenue is generated through

on-air advertising. Cable networks do not pay anything to the channels for transmitting their content. The TV channels do not charge any subscription fee from the end consumer either. Direct to home (DTH) is absent. As a result, a parallel economy has emerged that acts as intermediaries distributing the media like cable operators who earn 200 percent of the Pakistan TV advertisement economy instead of the content producers.

The authority has long been the enforcer of the government's campaign of media censorship and repression. It has ordered television channels to shut down for airing criticism of the government, terminated live interviews of opposition leaders, blocked cable operators from broadcasting networks that aired critical programs, and controlled advertisements for news channels in an attempt to silence them. The most recent example is the Dawn TV channel, whose advertisements were banned. Other curbs on media freedoms include the Prevention of Electronic Crimes Act passed in 2016, which provides strict online content regulations designed to tighten censorship. The federal cabinet approved the formation of the Pakistan Media Regulatory Authority, a single body to regulate all the media in 2019. The Pakistan Federal Union of Journalists released a statement afterwards calling the move in violation of the constitution.

4. The political aspect of the media economy

The influence of media penetrates nearly every corner of society and every aspect of life. But it has also been a contested realm, embodying class politics and the interests of business entities. Pakistan's electronic news media celebrated as proof of its democratic credentials. But it is also viewed as a destabilizing force, one that spurs political instability, hijacks foreign relations and promotes extremism.

The growth of electronic media has helped build an active civil society and an informed citizenry in Pakistan. For instance, the media helped in spread the anti-government wave, which erupted following Musharraf's firing of the chief justice in 2007, resulting in the restoration of the Chief Justice. The media is also credited with articulating the public demands and serving as

gatekeepers by helping the citizenry heard in ways previously denied by political institutions. According to a survey conducted across Pakistan in 2018, nearly 68 percent of Pakistanis closely follow the local news while 51 percent believe the media is doing well in reporting the most important news. Similarly, 60 percent of Pakistanis believe the news organizations are doing well in reporting news accurately. While 58 percent agree that the media organizations are doing well at reporting about government leaders and officials.

With online news sources, news delivery is expected to be instantaneous, and journalists and news agencies face pressure to release stories rapidly to keep up with competing media sources. It has caused tension in journalism

between being first and being right. With this pressure, standards of accuracy and fairness become more difficult to uphold, impacting credibility. The TV debate shows lack quality analysis and good discussions. Politicians fighting everyday end up giving no sense to the viewers.

For instance, a popular TV personality, Meher Bokhari, bullied the late Punjab Province Governor Salman Taseer in a 2010 interview. One observer concluded that the interview whipped up such hatred that it contributed indirectly to Taseer's assassination. Often, however, politicians drive sensationalism. A senior leader from the ruling party once hurled a glass at a fellow guest during a TV talk show. Perhaps the most troubling consequence of unregulated press is the erosion of the line separating fact and fiction. It loomed large in 2010 when several media reports hinted that a famous 2009 video of a girl getting publicly flogged in Taliban-occupied Swat was a fabricated story. In 2009, the U.S. Congress passed (and President Barack Obama signed into law) a \$7.5 billion economic assistance package for Pakistan. The state concluded that some of the conditions in the legislation amounted to excessive micromanagement of Pakistani affairs. The media promptly picked up deliberately leaked reports and widely disseminated their findings. Journalism has become a hostage to corporate culture and ratings. As a result, they cater more to market requirements rather than journalistic

considerations. Disinformation campaigns are using 0.005 percent to 0.5 percent of truth and then manipulating the truth to alter consumer behaviour. We do not have the tools and strategies to counter the campaigns of disinformation. An information vacuum is first created and then that vacuum is countered with fake information. Kamal Siddiqi, director of the Centre of Excellence in Journalism, blames shoddy TV journalism on reporters, newsroom staff, editorial boards and the race for viewership ratings. "In Pakistan, we have a very unusual situation – a flawed rating system," "You have 40-odd news channels competing with each other. The minute one channel does something different or reports something, it gives them ratings – and journalists and reporters are told this is good work."

"An unpaid journalist would care more about his financial problems instead of concentrating on quality and doing efforts for freedom of the press. With journalists surrounded by their problems, there is hardly any debate about censorship and this is dangerous for journalism,"

says Mazhar Abbas. "If the situation persists, the ultimate losers will be journalists and journalism." While the economic situation may silence some voices, few journalists will continue to assess and censure the government and its policies. After censorship and the closure of some private channels, many TV journalists have formed their YouTube channels.

5. The way forward

A free media is not only the backbone of a civilized society but also serves as the lungs of society that allow it to breathe freely, says I A Rehman. The country needs to have a set of minimum standards of professionalism. It will include journalistic ethics and an enforcement mechanism to preempt extremist positions.

There is also a need to ensure: that media is independent and reflects the diversity of opinion; it informs people with accuracy based on facts and not fiction.; develop a code of conduct for the media; amending of the PEMRA law to ensure efficient working of the media market; and reporters need to free themselves from the stranglehold of the seths, media moguls.





Understanding Broadcast Media Economics in Pakistan

Fahd Zulfiqar, Fida Muhammad Khan

1. Introduction

The concern of Economics is welfare of people through opportunity, employment and production of goods and services. Economics deals with the question of what is produced, what technology and which organization goes into producing the output, for whom the output is produced, and how is it sold in the market. The sales of output is distributed to employees, suppliers, owners and shareholders. Similar economic principles are applied when we talk about media industry across the globe, because media market performs a very useful task by creating employment, value and growth. Media economics is a specialized field in Economics based on economic theories and methodological frameworks applied to all types of media; broadcast, print, or social. Media economics is focused on the application of economic principles to economic policies and practices of media houses, news industries, film production, broadcast media, digital media companies, and media advertising spends/expenditures. Additively, Media Economics also encompasses themes such as role of media regulators, intellectual property rights, media taxation, and media ownership.

Owers, Carveth, and Alexander (2004) define Media Economics as *'the business operations*

and financial activities of firms producing and selling output into various media industries'

(pp. 5). Similarly, Picard (1990) defines media economics as how *'media industries produce and allocate resources to create information and entertainment content in order to meet the needs of audiences, advertisers, and other social institutions.'*

In macroeconomic context, the focus of Media Economics is on the aggregate economy and its functioning on the whole. The interest in Media Economics began in 1970s but proliferated in 1980s as a result of academic interest in US and European universities. The Journal of Media Economics also began publishing in 1988. As a specialized field of inquiry, Media Economics is being taught in the academic departments of Business Studies, Media Studies, and Cultural Economics, across different universities. The interest in Media Economics is also driven by empirics. For instance, over the years, contribution of media industries (broadcast, news channels, film etc.) to GDP has increased. Some of the stylized facts about US media economy are detailed in the box.

US Media Economics

- The contribution of media industries to GDP was 2.6% in 1982 which grew to 2.9% of GDP by 1986.
- From 1981 till 1986, the US economy grew at an average compound rate of 7.4% and media industry spending increased at an average rate of 11.2%.
- For much of the decade of 1990s, growth rate of the order of 5% to 7% was experienced, which indicates that media industries grew at rates above the economy in both absolute and relative terms.
- Since early 2000s till date, the share of media industries to GDP has continued to expand.

Picard (1990) shows that investment in media firms and industries, for instance in filmmaking or broadcast media, yields returns higher than the production costs. Hence, investment in media market has a multiplier effect as the firms and industries making such investments make payments to actors, technicians, returns to investors, suppliers and business firms. The employees will consume part of their wages and salaries and business firms will, in turn, pay to their employees or may start new filmic, cinematic, or broadcast ventures, hence furthering business expenditures. Therefore, one-time investment in and by media firms and industries creates employment, economic value and growth by a marked extent. Picard (1990) suggests that the numerical estimate of multiplier falls in the range of 4 to 6. This implies that an investment of PKR. 20 million in filmmaking may increase the GDP by PKR. 100 million.

After having explained what Media Economics entails, in the following text, areas of thematic focus in this paper are outlined:

- Key markets of broadcast television.
- Functioning of media market in Pakistan in

relation to market expansion and media advertisement expenditures.

- Politics of media ratings in Pakistan.
- Role of PEMRA as an authority for regulating broadcast media in Pakistan.

For the purpose of current paper, we have focused our analysis to broadcast media only the reason being that broadcast media is the most consumed form of media in Pakistan. The section on media advertisement spends will also detail that maximum spend is on broadcast media as compared to other forms (cinema, digital, & radio, to name a few). A similar piece with thematic variance can be produced for different forms of media in Pakistan. For the current paper, we have read literature on media economics, broadcast media in Pakistan, and politics of media economics in Pakistan. From thereon, we have drawn parallels as well as marked differences among cited literature, articulated the common as well as competing arguments, expositing the evidential data, and synthesized the data under different themes.

2. The Economics of Broadcast Television

Ferguson (2004) classifies broadcast television networks as business for media firms and industries. There are four key markets

determining the resource allocation decisions in the broadcast network television, detailed as:

BOX 1: Key Markets of Broadcast Television

- The first market involves industries seeking for an optimal mechanism of resource allocation to benefit TV content producers and consumers. The market includes production houses, media organizations, and media channels which provide platform for programs of different contents.
- The second market is concerned with the internal efficiency of the television stations or program producers who are largely interested in cost-controls of producing television shows. Already-known and large companies take advantage of economies of scale (utilization of big and expensive studios) and economies of scope (distributors, producer and exhibitors). Big broadcasting networks afford to commission expensive programs.

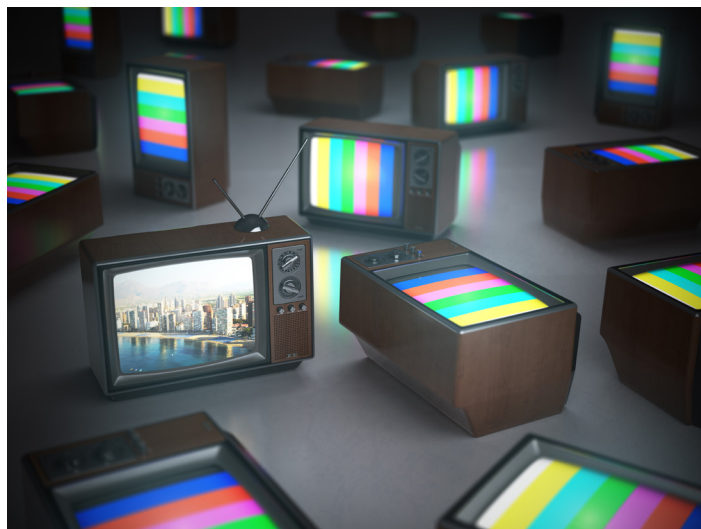
- » For instance in US, the four largest networks spend around 418 billion per year for their programs. The system, however, has seen changes over the years from advertiser-controlled programs in 1950s, to network-controlled in 1960s, to studio-controlled in the regulated 1970s and 1980s and finally back to network-controlled in the deregulated 1990s (Ferguson, 2004). More recently, with the emergence of Over the Top (OTT) platforms, digital-controlled programs are also proliferating in the market.
- The third one is consumer-driven in which the consumers of TV contents pay direct costs especially in the case of advertising supported broadcasting. The audience also pay the opportunity cost of leisure-time allocation by losing time for activities such as sleeping, cooking or studying. Opportunity cost is considered trivial as it is not measured in terms of money. Hence, non-economic costs are not catered to or incorporated in this regard.
- Fourth market deals with stations and programmers who sell the attention of audiences towards their contents and programs. The buyer in this scenario is the advertiser who wants to access the audiences. Currently, in the wake of pandemic, digital platforms such as OTT (Netflix, Amazon Prime, etc.) have provided a variety of programs for entertainment and instructional purposes whose increased subscription across the board is showing high demand in supply-demand framework of digital media.

The simultaneous functioning of markets aligns market structure for smooth functioning of media firms and industries but also calls for important interventions on the part of government for:

- Ensuring quality and quantity controls.
- Facilitating business communities and investors through relaxing regulations on media laws.
- Giving autonomy to broadcasting media networks, media houses and independent content producers.

3. The Media Market in Pakistan

Since 2000, Pakistan's media industry has expanded in size. In 2002, the country opened its broadcasting sector for commercial sector. Till 2019, there were 100 functional TV channels and 150 radio stations in the country. The number of journalists has also increased from 2000 to over 20,000, and the overall increase in the number of people associated in the media industry has increased to about 250,000. The expansion in media industry is the result of an increase in per capita income, consumer economy, advertising sector, and expansion of private sector. The evolving dynamics of media market is detailed in Box 2.



BOX 2:

Economic dynamics of media market in Pakistan

- Between 2002 and 2017, a cumulative investment of USD 4 billion in the electronic media industry was made in Pakistan. Expansion of media in the private sector is the result of economic growth & expansion in the media groups, content producers, advertisement agencies, and propagation of variant avenues of performing arts.
- In 2002, when the broadcast sector was opened up for private ownership in Pakistan, it was dependent on advertisement revenues from telecom firms. The situation drastically changed, particularly in 2018 advertisement revenues shrunk for print and electronic media which brought news organizations to closure. The private sector such as banks, textile industry and telecom firms, cut down their advertisement budget by 50%.
- From 2015 till 2017, the advertising market size has grown from PKR 66.9 billion to PKR 87.7 billion. Since 2017 till date the advertisement budgets have shrunk as stated in the following:
 - » In 2018, Punjab and Sindh governments, cut down advertisement budgets by 70%.
 - » Pakistan's TV ad-spend 2014-2019 has experienced 7% decrease in 2020, 26% decrease in 2019, and 9.5% decrease in 2018. Overall, a downward trend started in 2017.
 - » On the other hand, Pakistan's digital ad-spend has increased 2014-2020 with 30% increase in 2020, 31% increase in 2019 and 45% increase in 2018.
 - » Overall, there has been an upward trend. Many media companies own more than one form of media category, such as TV, radio and internet. The horizontal expansion of media forms also expands audience outreach.
 - » With respect to advertising revenue, out of the 15 topmost earning channels, 7 were news channels and 8 were entertainment channels, in 2017-18. Geo and Dunya news channels raked in PKR. 4.5 billion of the total PKR. 26 billion ad revenue of the entire TV sector.
 - » The reason for increase in advertising budgets from 2013 till 2017 and then later in 2018 can be millions of rupees spent by political parties on election campaigns.
 - ♦ According to Elections Act 2017, a candidate for National Assembly can spend up to PKR. 4 million and for Provincial Assembly up to PKR. 2 million on the election campaign. No such restrictions were imposed on party advertisements. A report published in Business Recorder stated that medium sized channels charged PKR. 200,000 to PKR. 250, 000 per minutes for paid content. Top-rated channels charged PKR. 350,000 to PKR. 400,000 per minutes for paid content.

- ◊ In 2013 elections, as well, the Pakistan Broadcasters Association raised advertisement prices by 25 percent. The upper limit for National Assembly candidate was PKR. 1.5 million and for National Assembly candidate, PKR. 1 million. Top-rated channels charged approximately PKR. 300,000 for one minute paid content in 9-10 pm slot and medium sized channels charged approximately PKR. 75, 000 for one minute paid content in 6 pm-midnight timeslot.

4. Media Advertising Spend in Pakistan

There exists a positive relationship between media advertising spend and economic growth (Wurff, Bakker and Picard, 2008). The impact of economic development on advertising expenditures, however, varies when differences related to space, time and the type of media are brought in. In countries like United States and Europe, print media suffers more than electronic media during economic recessions. The variations can be due to a number of reasons such as media planning and marketing, limited number of advertising companies in the market, and media contents these companies are looking for. It is important to study the nature of these variations, the impact of the same on advertising expenditures as well as the impact of economic development on these expenditures. Media advertising spends are also important to study as slight variations in these may severe financial consequences for the media houses and organizations. In the following are stated a few relevant studies that articulate the importance of media advertising spend and the relationship between media spend/expenditure and economic growth.

- Ostheimer (1980) concludes that during phases of economic peaks magazine advertising spends improved and declined during economic troughs.
- Jones (1985) asserts a close fit between Gross National Product (GNP) and advertising between 1961 and 1983. Callahan (1986) also summarizes that advertising expenditures across various forms of media improve as GNP increases.
- Economic activity and advertising expenditures moved in the similar directions based on the findings of the research

conducted by Swerdlow and Blessios (1993).

- Shaver and Shaver (2005) by conducting a research on 8 developed countries concluded that 6 countries showed positive articulation between advertising expenditures and GDP.
- Speaking of causality, research signifies that economic growth affects advertising expenditures and the impact of expenditures on growth is minimal. Hence, growth is the most critical concern for the expansion of media market, just like any other market.

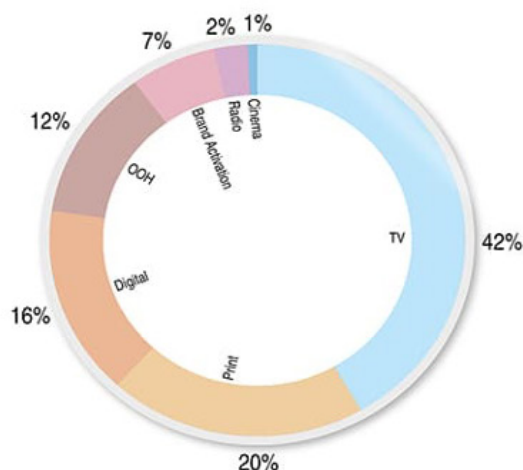
After having explained importance of media advertising spend for survival of media organizations, in general, and media market, in particular, in the subsequent text is explained research conducted by Aurora and Gallup Pakistan on the dynamics of media advertisement spend since 2011, what has been the expenditure share of different forms of media, and reasons accounting such differences in shares. Research conducted by Aurora explains that in FY 2018-19, TV had the major share of advertising spend (42%), followed by print (20%), and digital (12%) with cinema securing only 1% of the total advertising spend. When compared with FY 2017-18, all forms of media barring digital and OOH has shown decline in ad-spends in FY 2018-19. Comparison reveal a decline of 18% in total advertising spend in FY 2018-19 with FY 2016-17 as the base year. The info-graphic, borrowed from Aurora issue, details ad-spend as follows.

MEDIA ADVERTISING SPEND

Source: Aurora in consultation with industry sources.

FY 2018-19

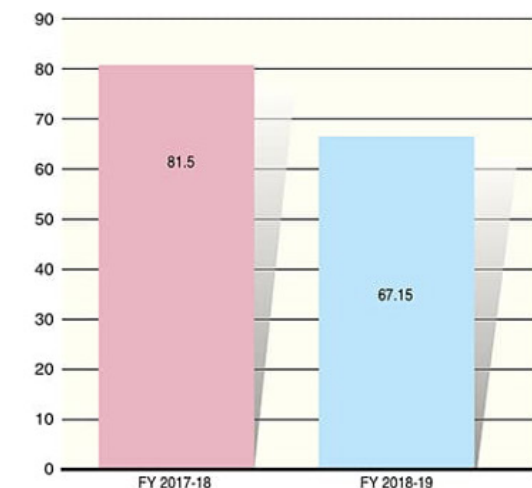
Total Advertising Spend



	FY 2017-18		FY 2018-19	
	Rs (billion)	Share	Rs (billion)	Share
TV	38	46%	28	42%
Print	19.5	24%	13.5	20%
Digital	8	10%	10.5	16%
OOH	7	9%	8.4	12%
Brand Activation	6	7%	4.5	7%
Radio	2.5	3%	1.75	2%
Cinema	0.6	1%	0.5	1%
Total	81.6	100%	67.15	100%

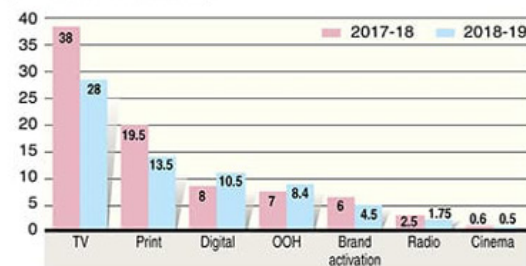
Total Advertising Spend

Two-Year Comparison (in billions)
(FY 2017-18 & 2018-19)



- Total ad spend (revenue) has decreased by 18%; in FY 2017-18 it decreased by 7%.

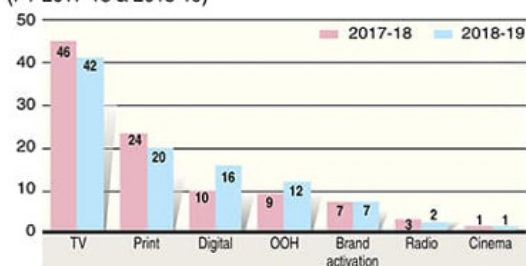
Total Advertising Revenue Per Medium — Two-Year Comparison (in billions) (FY 2017-18 & 2018-19)



Revenue	FY 2017-18	FY 2018-19
TV	38	28
Print	19.5	13.5
Digital	8	10.5
OOH	7	8.4
Brand Activation	6	4.5
Radio	2.5	1.75
Cinema	0.6	0.5
Total	81.6	67.15

- TV ad revenue **decreased** by Rs 10 billion (26%).
- Print ad revenue **decreased** by Rs 6 billion (31%).
- Digital ad revenue **increased** by Rs 2.5 billion (31%).
- OOH ad revenue **increased** by Rs 1.4 billion (20%).
- Brand Activation/POP ad revenue **decreased** by Rs 1.5 billion (25%).
- Radio ad revenue **decreased** by Rs 0.75 billion (30%).
- Cinema ad revenue **decreased** by Rs 0.1 billion (17%).

Percentage Share Per Medium — Two-Year Comparison (FY 2017-18 & 2018-19)

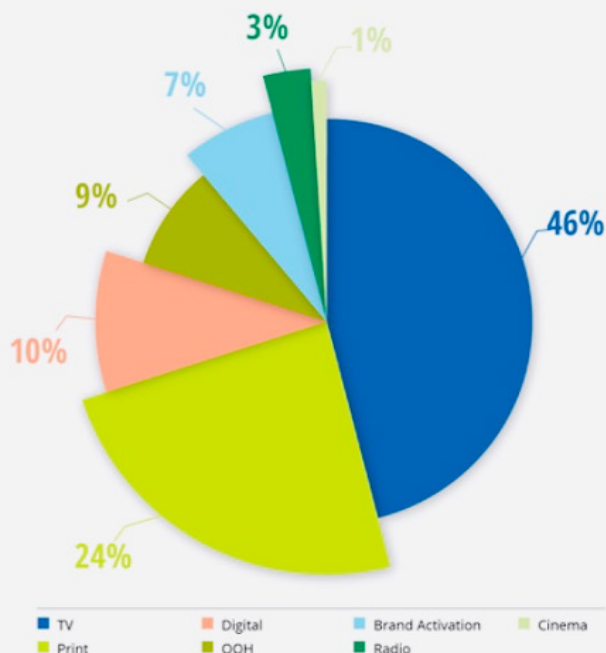


Medium	FY 2017-18	FY 2018-19
TV	46%	42%
Print	24%	20%
Digital	10%	16%
OOH	9%	12%
Brand Activation/POP	7%	7%
Radio	3%	2%
Cinema	1%	1%

- TV – **decreased** by 4%
- Print – **decreased** by 4%
- Digital – **increased** by 6%
- OOH – **increased** by 3%
- Brand Activation/POP – **no change**
- Radio – **decreased** by 1%
- Cinema – **no change**



MEDIA ADVERTISING SPEND 2017-18



	FY 2016-17		FY 2017-18	
	Rs (billion)	Share	Rs (billion)	Share
TV	42	48%	38	46%
Print	20	23%	19.5	24%
Digital	5.5	6%	8	10%
OOH	11.8	13.5%	7	9%
Brand Activation	5	6%	6	7%
Radio	3	3%	2.5	3%
Cinema	0.4	0.5%	0.6	1%
Total	87.7	100%	81.6	100%

Data compiled by Aurora & Gallup Pakistan highlights media advertising spend on TV, print, digital, radio, cinema, brand activation, & out-of-home categories. Ad-spend trends for FY 2016-17 and FY 2017-18 are shown. Overall, ad-spend has decreased from FY 2016-17 to FY

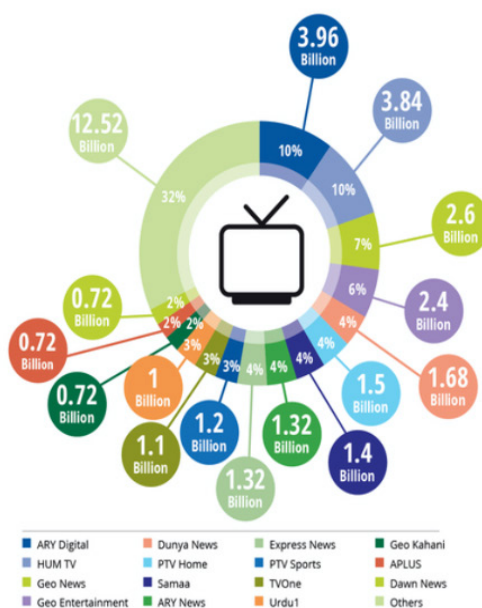
2017-18 (87.7 billion to 81.6 billions). The share of ad-spend on TV for both FYs is maximum (48% & 46%, respectively), but barring digital, cinema, and brand activation, for other categories including TV, print, & OOH, the ad-spend had shrunk from FY 2016-17 to FY 2017-18.

**MEDIA
OWNERSHIP
MONITOR
PAKISTAN**

freedomnetwork
—DEFENDING PRESS FREEDOM & FREEDOM OF EXPRESSION—

**REPORTERS
WITHOUT BORDERS**
FOR FREEDOM OF INFORMATION

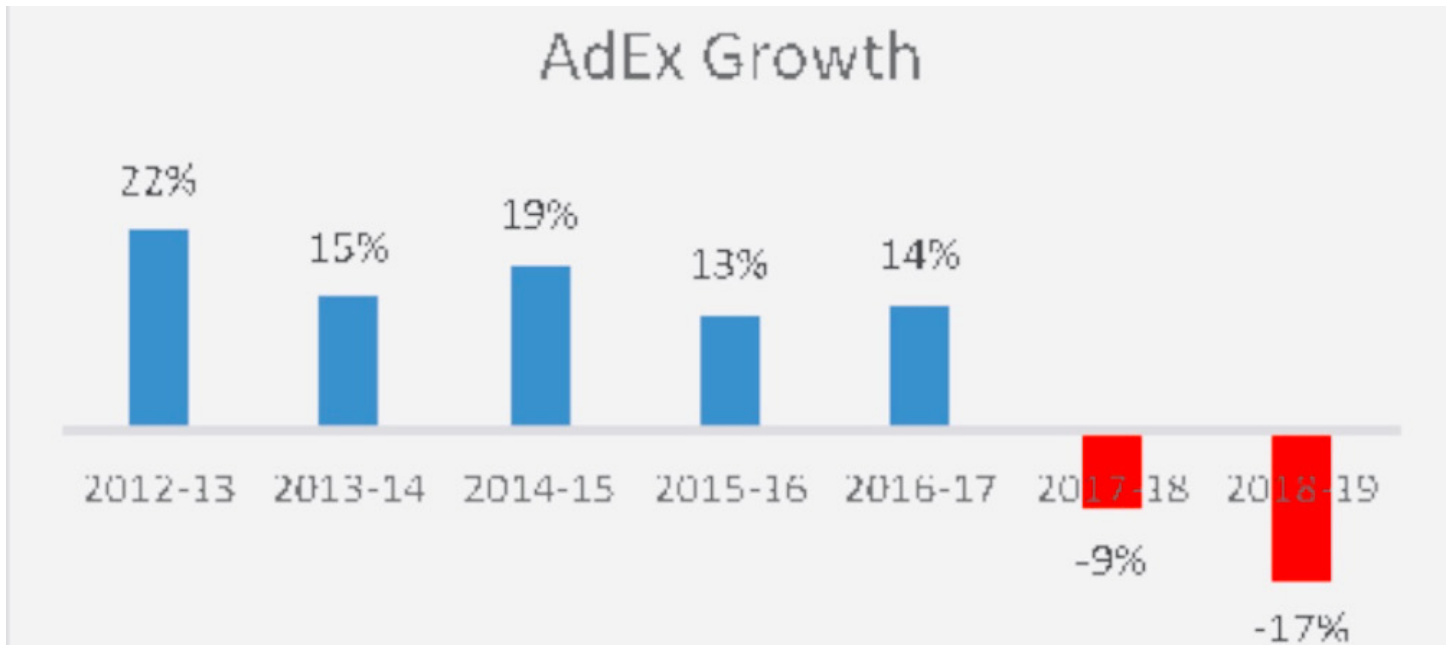
TV SPEND BREAK-UP 2017-18



Channel	Rs (billion)	Share
ARY Digital	3.96	10%
HUM TV	3.84	10%
Geo News	2.6	7%
Geo Entertainment	2.4	6%
Dunya News	1.68	4%
PTV Home	1.5	4%
Samaa	1.4	4%
ARY News	1.32	4%
Express News	1.32	4%
PTV Sports	1.2	3%
TVOne	1.1	3%
Urdu1	1	3%
Geo Kahani	0.72	2%
APLUS	0.72	2%
Dawn News	0.72	2%
Others	12.52	32%
Total	38	100%

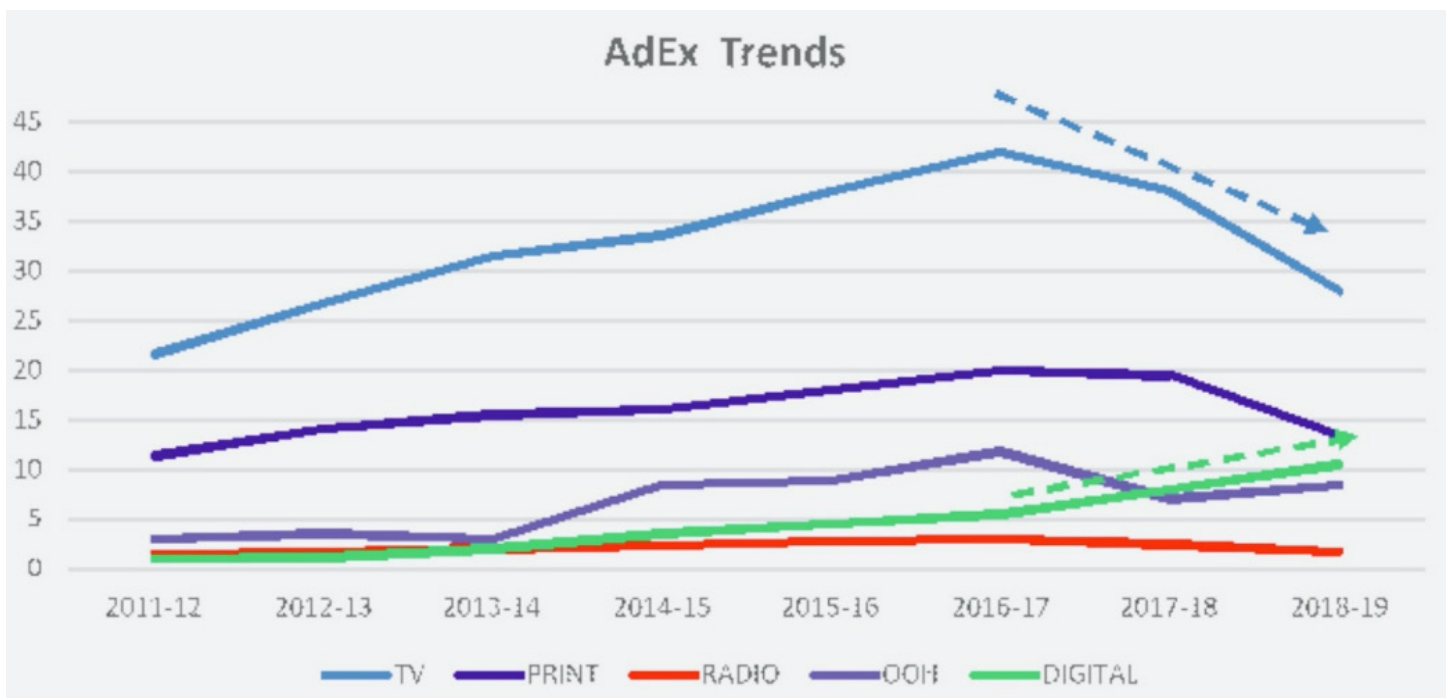
The data about TV spend break-up is compiled by Aurora & Gallup Pakistan for FY 2017-18. Data shows that with respect to ad-revenues in the fiscal year 2017-18, out of top 15 TV channel

earners, 7 were news channels & the rest were entertainment channels. Among news channels, GEO & Dunya News raked in PKR. 4.5 billion.



Ali (2019) using data from Aurora Annual issues (2012-2019) shows that until 2017, the overall ad-ex was increasing but in FY 2017-18 and FY 2018-19, the ad-ex growth has become negative, -9% & -17%, respectively.

The chart by Ali (2019) shows that ad-ex share has been increasing since 2011 till 2017, afterwards there has been a downward spiral. Same are cases with print and radio categories. The exception is digital category where there has been observed a growth since 2016.



Pakistan's Advertisement Market

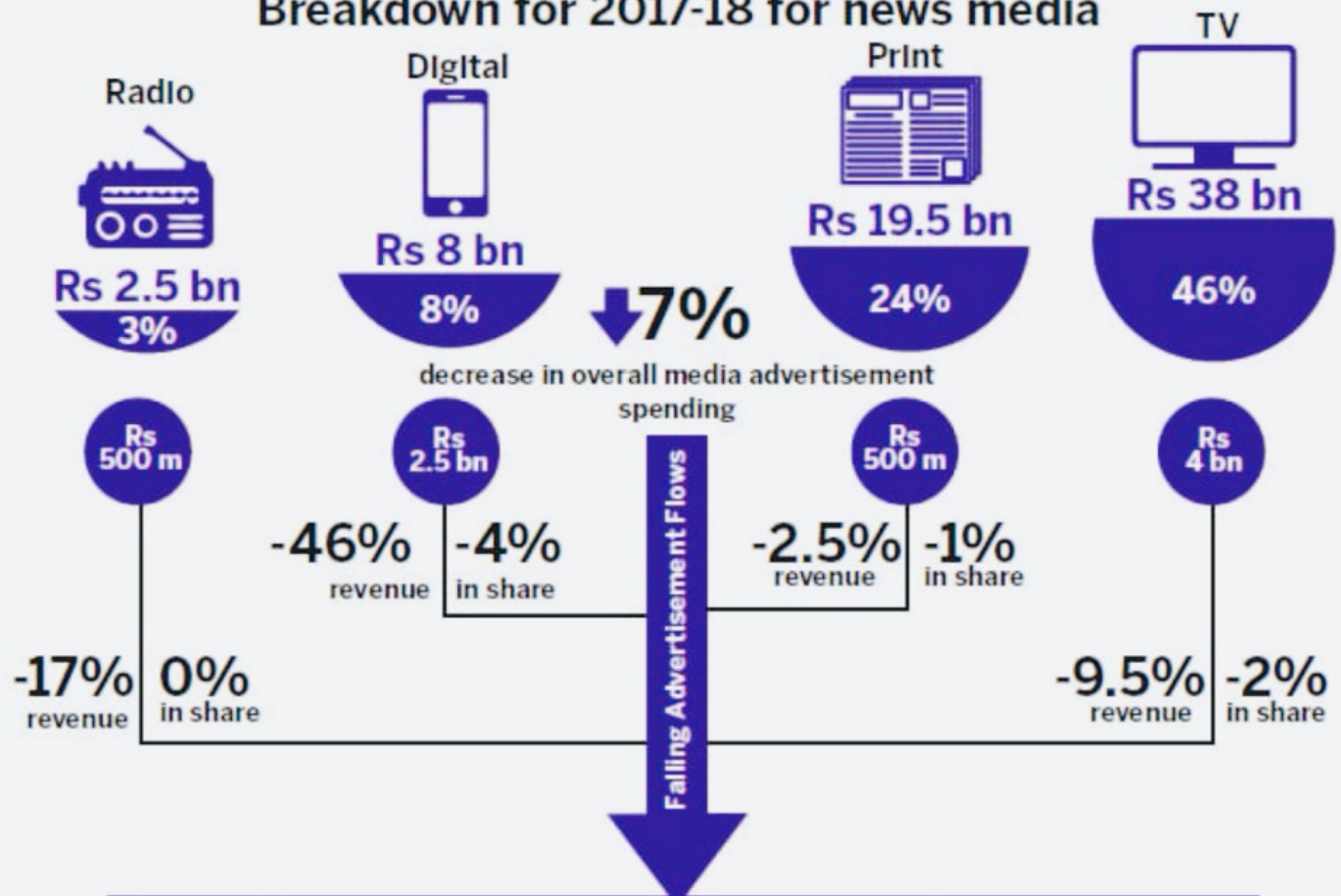
Rs 87.7 bn

2016-2017

Rs 81.6 bn

2017-2018

Breakdown for 2017-18 for news media



Biggest advertisement sources for the media



Federal government
(largest spender)



Real estate



Education



Finance sector



Big Pharma

The above figures summarize Pakistan's advertisement market detailing that advertising expenditure has reduced from 87.7 billion in FY 2016-17 to PKR. 81.6 billion in FY 2017-18. There has been a fall of 7% in overall media advertisement spending. TV still constitutes the major

component of ad-expenditure (46%) with radio as the minimum share (3%). The figure also highlights major advertisement sources for media in FY 2017-18, which include Federal government, real estate, education, finance sector and pharmaceutical companies.

5. The Politics of Media Ratings in Pakistan

Broadcast journalism is understood and appreciated as a strong democratic force but at the same time it has also been criticized for being sensationalist, unethical and overly commercial. Over the years, the quality of content has degraded and fallen victim to the fight for media ratings.

Television Rating Point or (TRP) is a 'tool to gauge viewership of televised content' (Baig, 2014; pp. 32). The data is based on the map of drops and surges in TV audiences at a point in time. It takes into account spatial spread and duration of viewing to represent a sample size of TV viewership. TRPs are collected with the use of Television Audience Measurement (TAM) systems. The rating system as exercised in Pakistan is TAM system which caters to big cities namely Lahore, Karachi, and Islamabad. TAM helps in systematically recording and analyzing TRP data and this data is the one Pakistan's broadcast media economy strives on. Baig (2014) is critical of TAM for not capturing the patterns of national viewing because the system does not collect data on nation-wide TV ratings. TAM was established by Pakistan Advertisers' Society (PAS) and Pakistan's Broadcasters' Association in 2007, for generating TRP data and aligning data

according to advertisers with little or nothing to do with the broadcasters. Since many of the advertisers have their consumer markets based in urban areas, hence their sample size is biased towards same areas, based on socio-economic profiling of the urbanites. The assumption that viewing patterns in rural areas would follow the same trends as followed in urban areas, rules out the reason for including a representative pool from rural areas.

With broadcast sector opened up for private ownerships in 2002, the advertising spend has increased significantly, with TV as the largest shareholder in the country's annual advertising budget (approximately 61% share) (Baig, 2014). Among these advertisers are the medium or large corporates and advertising agencies who look out for avenues in order to reach out to larger audiences. They are not entirely dependent on TRP data to meet this end, still TRPs are the most commonly used market assessment tool. With Pakistan's electronic media's contingency on revenues collected from advertisement base, the quest to secure highest ratings is critical for media houses for their survival. Following two groups collect data for media ratings in Pakistan.

BOX 3:

Media Houses Conducting Media Ratings in Pakistan

- Gallup Pakistan and Medialogic are the two sources operating TAM in Pakistan.
- Gallup Pakistan used the diary system and bases its methodology on household surveys across Pakistan and collected data from 4800 urban and 700 rural centers.
- Medialogic used People's Meters. Making use of technology, these meters are installed in selected households to record patterns of TV viewing of a specific household in the country. The group claims to have access to 6500 individual consumers (average 6 per household) deploying 1100 meters in 20 cities.
- PEMRA has listed 5 registered TAM/TRP services companies in Pakistan:
 - » Medialogic Pakistan
 - » Media Voir
 - » Din Industries Limited
 - » Breeo International
 - » The Media Trackers

TAM provides data to advertisers whose interests are in finding best TV channels and timeslots for their product's advertisements and coverage. Baig (2014) finds it even more problematic when broadcasters start fine-tuning their program or news contents as per the wish list of the advertisers. Given that 100% broadcast media's revenues are dependent on advertising revenue, hence making media content 'advertiser friendly' becomes a survival strategy for media houses. In their incessant quest to secure more revenues, securing highest number of advertisements becomes the sole objective of media houses, which deviates them from their core objective of public service. The rating rat-race also results in media's over-commercialization and looking out for stories, news and political narratives that can generate more ratings rather than providing news and contents that are of greater public and political significance. The report by Baig and Cheema

(2015) discusses financial structure of the media industry of Pakistan, and explains how it has become the cause of so-called over-commercialization of media. In addition, the report also explains the economic landscape, financial and technical infrastructure of Pakistani broadcast media. Economic infrastructure of the media industry is such that it does not provide financial support to the small broadcast channels and local/regional channels. It rather puts them at a disadvantage. Biasness towards news coverage from urban centers sidelines critical issues of concern for population in rural areas. Urban-centric TRP system is also marginalizing regional channels, which mostly cater to the regional news. The report also calls for conducting surveys to collect data from rural areas and other urban centers. There is only one source from where we get the information about flow of advertising revenue. The collection of such information needs to be expanded, sources

should be diversified, and country wide TRPs need to be collected. This will discourage monopolization of TRP data and will also enable cross-verification.

Media has aligned itself with commercial enterprises, political and non-political organizations and a rat race for TRP has consumed the quality media content. Following this course of action, broadcast media has become totally disengaged with the consumers and has forgotten its purpose of public service. It's no longer considered impartial from the consumer's standpoint and therefore has lost most of its credibility. The broadcast media over-relies on advertisement revenue. This is a big economic problem in the media industry. There can be ad-based revenue generation but also subscription-based revenue generation as well as part ad and part subscription-based.

6. PEMRA's Role as Regulator of Broadcast Media

PEMRA is a regulatory authority responsible for providing channel licenses for foundation of the broad communication, print and electronic media. Among PEMRA's objectives is to encourage private electronic communications industry and to improve the principles of data, instruction and amusement. Media law is related to the legal regulations of the telecommunication industry, information technology, press, broadcasting, advertising, entertainment industry, internet as well as online services. There are functional legislative mechanisms that directly or

indirectly affect the media. Decades earlier, Radio and TV broadcasting was State's responsibility with minimal existence and intervention from private sector. By late 1990s, in order to control the expansion of Indian satellite channels, the idea to introduce private TV networks to attract public towards local content was focused upon. PEMRA started its functional operations in 2002. It regulates and issues channel licenses for setting up of the electronic media broadcast stations. It also monitors quality and quantity control. It comes under its mandate that the

media content or the person which/who defames the Head of the State, armed forces or executives, legislative or judicial constituencies of the State is liable to be jailed for up to 3 years and fined up to 3 million rupees with cancelled license

Media laws have gone through rampant changes over the political history of Pakistan. President Ayub Khan took the first step in introducing media law in Pakistan in 1962 by promulgating the Press and Publication Ordinance (PPO). He started nationalizing the large parts of the press and

took over one of the two largest news agencies. During the era of General Zia ul Haq laws in-line with Islamization sentiment were introduced in 1980s. Later, in General Pervez Musharraf's reign Pakistani Electronic Media boomed and liberated in the country. The liberal media laws broke the State's control on electronic media. In addition to this movement, television broadcasting and FM radio licenses were issued to private news sources. The involvement of the private sectors has undermined the government's authority and its ability to control over the broadcast industry. Private media enlarges avenues of current affairs, news shows, kids show, arts and culture, and science and technology.

PEMRA specifies some codes for broadcasters as well as cable operators. The codes are divided into two categories i.e. programs (including entertainment, current affairs, news) and advertisements. Programs and advertisements containing remarks against religious groups, promoting disharmony, pornography, abusive and derogatory language, false knowledge, misleading information, violence, anti-State narratives, institutions of social control, and crimes are strictly prohibited. The regulatory regime employed in the form of PEMRA needs to be revisited. The current regimes are designed as such that these allow for monopolies and concentration. More inclusive rules are needed which will lead to diversification and independence of media.

Alam (2014) takes a critical position on the regulatory role of broadcast media in Pakistan. PEMRA Ordinance 2002 gives authority to organization to take 'cognizance of any kind of violation of any law of the land by its licensees rather than other parties' (Alam, 2014 pp. 22). The procedure is such that any person from general public can file a complaint with the CoC against any content broadcasted and distributed by any PEMRA licensee. The council's role is to review the complaint and recommends authority about line of action which can be censure or fined against the licensee for the violation of the laws. In some instances, the authority can also take action by prohibiting the broadcasting, re-broadcasting or distributing program or advertisements. PEMRA can also suspend the license of the violator. PEMRA is the sole authority to lodge a complaint to a court of law to take cognizance of such complaints. The issue is not of quality and quantity controls done by PEMRA, the problem is that of circumventing its role only as the regulator of media content rather than regulator of media market. Airwaves being a public good ought to be regulated by the State authority for indiscriminate provision of information to the public. Hence PEMRA's role can be effective in this regard only if it responds to meeting objectives as stated in the PEMRA Ordinance 2002, at a time when it was institutionalized.

The scholars of political economy of communication also look upon concentration of ownership of media outlets by single group as harmful act to the industry. For instance Rasul and Macdonald (2012) quote Mosco (2009) while discussing the harms of concentration of ownership of media outlets. When big corporations are allowed to capture major chunks of the market, according to Mosco (2009), they are then able to decide the economics of broadcast media through which they can limit, mold, and in many case show custom news more suited to their agendas leading production of less reliable media products while consumers are unaware of it. The Regulator therefore is supposed to look into the issue of concentration of the media industry. Ideally it should be the entity that protects, nurtures and propels forward the media industry by keeping check on big corporations and facilitating the small local and regional broadcast media outlets.

Among PEMRA's mandate is to publish annual reports about situation of broadcast media prevalent in the country. PEMRA published an annual report for financial years 2015-18 in which data related to viewership, socio-economic profiles of consumers, and access to broadcast media were presented. The report states following facts:

- 65% of country's population watch cable television.
- 25% are terrestrial viewers.
- 9% have access to satellite dishes.
- The organization has issued 88 licenses for local indigenous satellite TV. 37 of which are of entertainment, 26 news and current affairs, 18 regional, 4 educational, 1 health, 1 sports and 1 agro-based channel licenses. 35 landing rights permissions also issued to off-shore channels.
- \$7.0 billion investment which created employment for more than 500, 000 qualified people, shows an upward trend in the direct and indirect employment opportunities in production houses, advertising agencies, and performing arts.
- 618 show causes notices and warnings issued to TV channels, ban on 25 programs and advertisements, and suspension of 13 TV channels.

7. What can be Done Next?

In the light of the brief's content we propose following points:

- The censorship role of PEMRA is problematic which is not helping quality-controls and checks as there is a political economy to TRP system which is driving national narrative in which real issues country is dealing with are completely ignored. Moreover, PEMRA Ordinance which was institutionalized in 2002 states in its mandate to create a media market free from informational asymmetries, informational biases, monopolies, and curbing freedom of speech. The ordinance also expounds on setting up a media market based on recent technologies. 2 of the objectives stated in its mandate elucidate:
 - » To facilitate the devolution of responsibility and power to the grass-roots by improving the access of the people to mass media at the local and community level.
 - » To ensure accountability, transparency and good governance by optimizing the free flow of information.
- The matter of devolution of power and responsibility is highly disputatious considering the role of surveillance taken up by PEMRA. In its spree to regulate broadcast content, PEMRA took several actions against TV channels in 2019; 20 show-cause notices, 5 advisories, 5 notices and 9 directives issued to its licensees (Institute for Research,
- Advocacy and Development, 2019). These actions have been the subject of criticism in public, media and academic discourses. This self-proclaimed role of 'censoring' and 'surveillance' needs to be deconstructed on organizational and discursive fronts. In this context, an evaluation of PEMRA is mandatory.
- The budgetary allocation to cultural industries, including media, has been inconsistent, at best, in Pakistan. In the light of the preceding text related to US media economy, the broadcasting networks have increased in size and media sector has increased at a rate higher than country's GDP. Multiplier impacts of one-time investment in media economy have actually been empirically tested across the globe and in many cases, the results are positive. In this regard, why not to actualize multiplier impact in Pakistan by pulling in more economic resources and generating growth and employment in the country?
- The model of public-private partnerships have helped revive regional media in India and Bangladesh. The same model can be tested in Pakistan. The inclusion of regional media will also help address the issue of urban-bias in current TRP system of broadcast media in Pakistan.

- Autonomous status of PEMRA is also questionable. It is argued that an autonomous regulator media free of any government or State control is desirable. In Pakistan, PEMRA laws authorize the Federal Government to issue policy directives to PEMRA. Moreover in 2017, the government of Pakistan linked PEMRA with the Ministry of Information and Broadcasting. This ministry exercises the power of the Federal Government to issue directives which further compromises on the autonomous and independent status of the regulatory authority, hence decision regarding issuance of licenses for broadcast media is under the directives of the government.

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The Importance of Media Literacy in Pakistan

Aisha Saeed

Independent Media and Foreign Policy Analyst

With the advent of technology, means of exchanging messages and sharing information changed drastically. Information is now at the human fingertips. The evolution of communication and information has broken all barriers with digital platforms and the rise of social media. Traditional or what is generally referred to as the mainstream media remains a prime source of information around the world and Pakistan is no exception. Mainstream media enables the spread of information to a larger segment of the public in a shorter duration as compared to any other medium of communication in the past.

The arrival of cable channels in Pakistan's early media landscape brought access to more information for the general public. This also started the expansion of the local media industry. Although Pakistan's media industry is relatively young as compared to the rest of the world, it has emerged as a vibrant and thriving industry for news and entertainment and became known as the "gatekeepers of knowledge" or the "watchdog" of the country.

These gatekeepers of knowledge are responsible for interpreting various messages, informing and educating the public, and spreading socio-cultural ideologies through entertainment. On the contrary, it can also be used as a tool to propagate a certain message or information. With the media's ability to change the perception of how people view things or form opinions, it has become an influential entity.

Given the vast accessibility and the profound impact of media in contemporary society, one must also understand the environment it operates in. The media in one country may not be similar to the media of another country. For instance, the media in Pakistan has developed an identity differentiating it from the media of the neighboring or the developed countries. But media in general (and in particular) the news media is expected to uphold the basic principles of the social responsibility that comes with being the gatekeepers in a society. And while these principles are taught and debated upon often, media literacy among the public is least discussed.

The conclusions drawn from various studies indicate a strong relationship between media and the public. While the media constantly feeds information, the public is constantly consuming information. The media uses the response it collects through TRPs to gauge the public's demand to help frame and time its content. This applies to both the news and the entertainment media.

Now, what media literacy is and why it is important among the public who is an informed viewer but not "media literate" needs to be addressed. "Media Literacy" is defined as one's ability to access the media and critically evaluate the various aspects of the media content to creating communication in different forms. A media literate person is not only able to receive the information disseminated by the media but is also able to access its impact and verify the information before responding to it. Recently, the Pakistani news media has been buzzing with words such as "misinformation" or "disinformation". The phenomenon of "fake news" has also become a reason for concern with the increased use of social media across the world. This highlighted the truancy of media literacy among the public.

In a country like Pakistan where the majority of the population is young but the general literacy rate is relatively low, media literacy is a challenging concept to promote but it is also not fully understood by the government. As the media faces strict regulations under government laws, the public is often faced with a dilemma of understanding the reasons behind those laws. The banning of a popular social media application had also received a public backlash but it was not the long-term solution to fighting the issue of media illiteracy prevalent in society. Similarly, many social issues can be addressed by promoting media literacy amongst the youth. The banning of content or social media applications obstructs the productive and positive aspects that come with these tools.

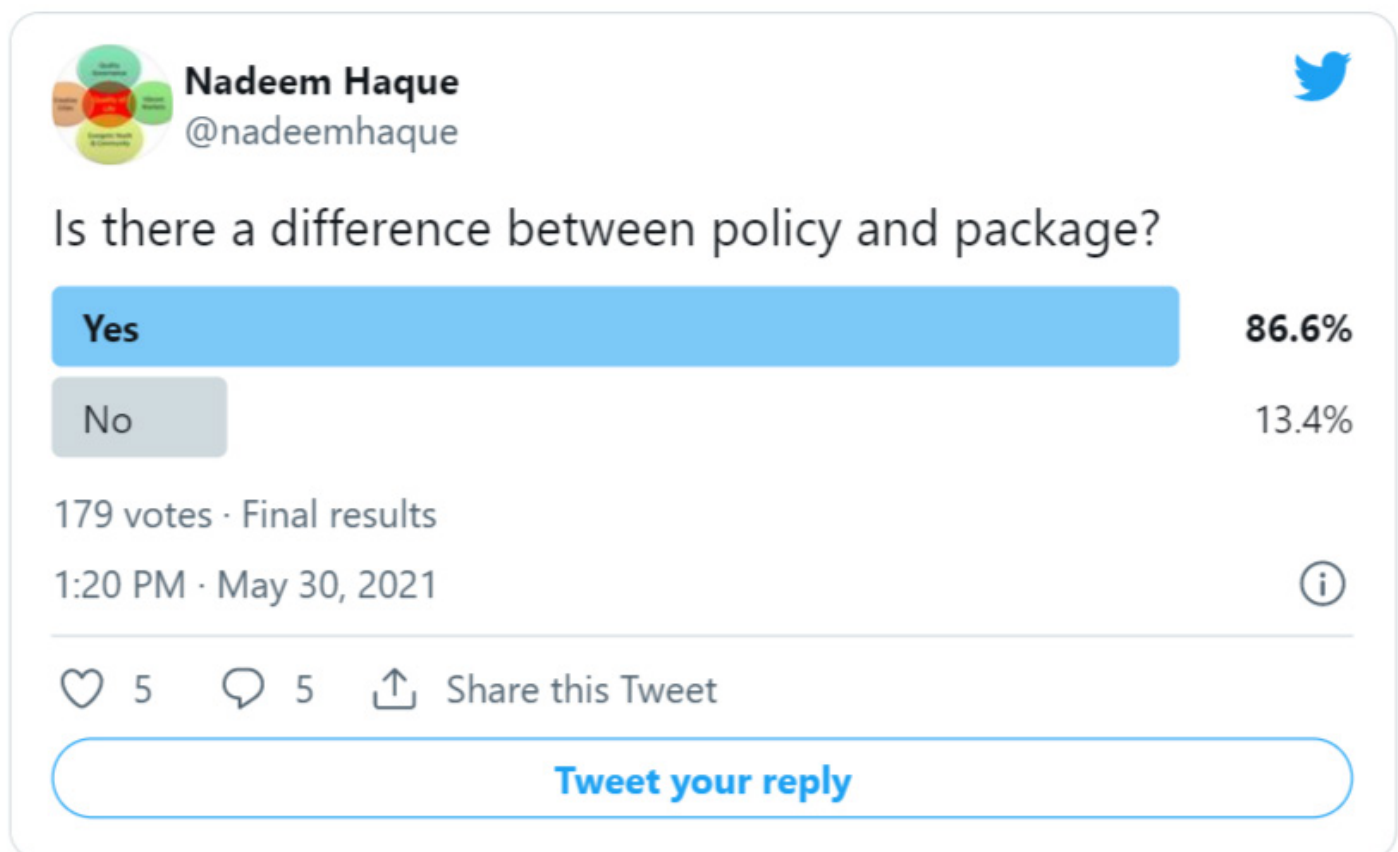
Pakistan recently exposed India's disinformation campaign to malign the country's international reputation. It also revealed the implications of the disinformation campaign and the extent of Indian intrusion in the country. This would have not been possible without India's understanding of

the concept of media literacy and its impact on individuals and the government.

Developed as a part of India's PSYOP and information warfare strategy against Pakistan, the years of "disinformation" campaign pointed to them being able to exploit the lack of media literacy in Pakistan to their benefit. Even though Pakistan has started to push back against the Indian schemes, it must consider introducing media literacy in the training of its officials.

Media literacy is now considered crucial to combating "mis(dis)information". It helps in stopping fake news from going viral and ensures that those responding to the information have a better understanding of how to respond to news or any other incident. A media literate public is then able to keep the content of media in check, making the exchange of information a two way process. For Pakistan to effectively tackle any future disinformation plot against the country, it should promote media literacy among the public alongside the media's own social responsibility. Academic institutions must ensure a course designed to enhance media literacy be taught as a subject to the students of all departments.

It is impossible to avoid the mainstream and social media in the 21st century. The tools necessary to reduce the power of misinformation are in our hands but it requires attention and only then we can win this intensifying and invisible war.



Imran Ghazali

Director General,
Digital Media Wing,
Ministry of
Information and
Broadcasting,
Government of
Pakistan.



You are heading the recently formed Digital Media Wing of Ministry of Information & Broadcasting. Why did the government realize the need for a digital media wing and what exactly is the role of this team?

According to the latest statistics that were published by PTA around 97% of people have internet access, either through 3G, 4G, or broadband connections available. A recent report that was published by via social has also mentioned that around 45 million people in Pakistan have access to social media and use it on daily basis. Keeping both of these statistics in mind, we cannot deny how important the internet has become in the lives of people. Digital media can be a valuable tool for the dissemination of information for the government. Up till now, there was not a proper department that was working in this field. However, realizing its immense importance government has made a department in the Ministry of information. The primary objective of this department is to highlight the work and initiatives of the Federal

government, disseminating information through different digital channels. We also publish details regarding any important projects and initiatives of the prime minister. An important benefit of this department is that authenticated information is published after being verified through proper government channels, the problem of misinformation is handled this way. If we look at this from a global perspective, we know that nowadays there is a war going on based on different narratives among different countries.

Having a platform online that publishes details regarding the work of the government and Pakistan, in general, helps us to clear the image of Pakistan in international media.

With the increase in digital technology, there has been an increase in digital journalism as well. News journalists and reporters are present solely on digital platforms, how does the government see the rise of digital journalism in Pakistan?

With the increase in the digital platform, opportunities for people have also increased in multifold. Young journalists throughout Pakistan use YouTube, some journalists who work on TV have their independent channels on YouTube. One of the significant changes that we have noticed after digital platforms are used by journalists is that people have stopped watching prime time talk-shows on Television. People prefer independent YouTube broadcasting more, the number of views on a single video is above 35k views. This is a wonderful opportunity for content creators in Pakistan. These content creators come up with innovative ideas that

are different from the current affairs portrayed on television. Economically, these people are also able to generate revenues out of these platforms. Now, the government is also coming up with the Digital media advertisement policy, through this government will be able to advertise and communicate with people through digital platforms. This platform will be used for the promotion of young content creators in Pakistan. Digital journalism has many positive aspects, young content creators are highlighting positive aspects of journalism which would be good for the image of Pakistan.

Young people are preferring Digital journalism; some senior journalists are also pursuing digital journalism. The reason behind opting for this mode of journalism as explained by senior journalists is that media houses impose certain restrictions and there are organizations like PEMRA which have their regulations as well. They claim that digital media is an open field they can publish anything. Is this true?

My perspective on this matter is that there are not any comprehensive restrictions on television shows as such. One of the issues that

I think should be tackled by digital media is the spread of Fake news. If checks and balances are issued by PEMRA to make sure that fake news

is not broadcasted, I do not think there is any harm in such restrictions. A recent incident that circulated media was the fake tweet posted on behalf of Shafqat Mehmood regarding the opening of schools during COVID. This caused a lot of problems. Many news anchors in Pakistan also broadcast fake news on their

YouTube channels, unfortunately, there is not any accountability in this regard. Freedom of expression in my opinion is important for people working in this field, however, disinformation should not be promoted and there should be strict checks and balance to deal with this issue.

Sir do you believe that electronic media is more difficult to regulate as compared to print media?

Yes, I do believe that electronic media is more difficult to regulate as compared to print media. People spread false news and have fake identities on digital media, so it becomes difficult to identify who the person is. FIA cyber-wing is responsible for handling this, but I believe that they lack the proper mechanism, human resources, and lastly, they do not have the proper skillset required to detect the behavior and patterns of the person who is

being investigated. The digital media wing of Pakistan is trying to enhance the presence of the government in digital media platforms. We have made sure that the accounts of government officials are verified on every platform so that the problem of fake news can be tackled. Apart from this, we are trying to make sure that this process is followed by every ministry within the federal government. We are trying to come up with a proper mechanism to regulate this.

Sir you talked about reporting that is done through YouTube and you highlighted some of its incredibly positive aspects. Why is the reason behind this positive viewpoint? What according to you are the differences between digital reporting and electronic reporting, and which one do you prefer?

The recent interview of Imran Khan by the digital journalists was initiated by the digital wing PTI and we are also working to make sure that several other federal ministries are also interviewed by digital journalists. The main purpose behind this is to reduce the information gap that exists and to highlight the work that the government is doing. Certain senior journalists working in Television feel threatened that they

are losing this control due to the emergence of young digital journalists. In my opinion, digital media is a great platform for people working in the field of media and journalism. People who are resisting this platform should encourage young minds in this field. These people can help in changing the narrative of the state and create a positive outlook of Pakistan internationally.

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Sir as far as digital journalism is concerned; we have seen that digital journalists have an incredibly positive outlook about the government in general. Even if reporting is done from a critical perspective, it is portrayed positively. It has also been seen that this government had clashes with electronic media houses as well as print media. What do you think is the reason behind the difference in the government's attitude between digital media and press media?

I think that perception has been built regarding the clash between the present government and media houses. The government has been advertising on electronic as well as digital platforms. If the government is pinpointing or highlighting the spread of false news and the propaganda that is spread by certain media

houses, I do not think there is anything wrong with this. Many media houses internationally are also under constant scrutiny for the proper portrayal in news. If the same thing happens in Pakistan, people start to raise questions regarding the clash between media houses and the government.

You talked about the Digital media advertisement policy and stance of the present government to make sure that advertisement is not used as bribery. Do you believe that this policy cannot be misused in the future regardless of what party is in power, as it would be easier to bribe two or three independent journalists as compared to the whole media houses?

There are certain analytical tools available for people working in digital media which helps in collecting several views. So, we can decipher the number of views that a certain campaign has garnered. We can also track the views and properly verify them. I believe that Digital media is more transparent, and every campaign is more trackable. Secondly, important governmental messages must reach people. Recently during corona, essential information regarding SOPs

was advertised on television. However, the message was spread more instantly by digital platforms as the internet is widely used by people all around Pakistan. We are trying to come up with a digital mechanism/policy which will be based on global regulations. People who will qualify for this policy will be independently able to work on digital platforms. We will also make sure that no biases based on pro-government or anti-government are carried out.

Just like the digital media policy, the government tried to introduce the policy on print and electronic media. Due to several reasons, these policies were not implemented. Is the present government planning on improving the print and electronic media regulations?

PEMRA has an input and recommendations platform for journalists and publishers in the print and media industry. They keep a lookout for

any regulations or feedback. Unfortunately, this does not fall in my domain so I cannot answer this thoroughly.

Sir, you raised an excellent point regarding digital analytics and how they are always available in digital media, which creates transparency. However, in the case of electronic media public is not aware of the analytics. Do you think that this difference in electronic and digital media causes insecurities among the journalists of electronic media?

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Yes, this can be one of the reasons as well. A young Youtuber who has more than a million views on his video is going to make a senior journalist insecure who has been working throughout his life. Another aspect of this is that a person who was hosting a show on television

was not able to receive direct feedback on his show. Now, due to digital media platforms, it is easier to get reviews. Senior journalists however are not very keen on the freedom of expression of the public.

If we talk about the impact of media in general, it is believed that electronic media has more impact as compared to digital media and it would not change in recent years. What do you have to say about the difference in impact between both platforms?

The overall impact of social media is extraordinarily little. If we look at platforms such as Facebook and Twitter, we can notice that something which is trending in these platforms will be highlighted for a maximum of 24 hours and then some other news will take over. The life of a narrative in social media is very less. If we compare this with television, any news which is

highlighted over there is discussed in prime time talk shows as well apart from news coverage. So, the impact of television is unprecedentedly high. However, this trend is changing with time. If we look at various issues around us, any discussion on a topic is initiated by social media, which is then picked up by news channels.

Where do you see print, electronic and digital media in the next 10 years in Pakistan?

When I started working, the overall digital spends out of the total marketing spend was just 5%. Now the number has increased up to 30%, which is a huge improvement. Pakistan is

improving in terms of these trends. I believe that the impact of digital media will increase in the coming years.

When is Pakistan planning on introducing media platforms like Netflix etc.?

As far as I know the government is working on the policies and rules and regulations regarding

such platforms, and it is expected to be released by this year.



A portrait of a middle-aged man with dark, wavy hair, a mustache, and glasses. He is wearing a dark suit jacket, a light blue shirt, and a blue and white plaid tie. The background is a solid red color.

Iftikhar Ahmad

Senior Journalist &
Political Analyst

What are your views about ethics in media in Pakistan, and how these have evolved over time?

Media has lost its ethical principles over time. Every person has a smartphone and internet access available, hence people portray their views without hesitation on digital media. If we look at electronic media and prime-time shows that are shown on television, it is sad to see different news anchors exploiting the same news in many ways. It is very surprising to see that different news channels have a total of 80 people working for their channel. Among them, only a few people are qualified for the job.

Sir, you have been associated with print media as well. Senior editors in Dawn news and other newspapers always presented a very apt analysis that included both criticism and commendation. The news was published keeping the rules and regulations in mind. Do you think that news channels and newspapers still follow the ethics and principles of broadcasting?

I think our values and morals have been shadowed by ratings. If a comedy show receives maximum ratings and its host is considered as a benchmark for other hosts, then sadly we cannot expect the public to engage in shows talking about serious issues like inflation. We are to be blamed here as well.

If we look at Gallup's surveys, Pakistan prime time shows focus a lot less on critical issues that are prevalent in the country. Most senior journalists blame society for this negligence as they claim that society is not interested in such issues. What do you have to say about that?

It is the sad truth of the media industry that shows are broadcasted based on ratings only. If irrelevant topics are of interest to the public, then they will be broadcasted. I do not think that anybody is to be blamed here. Primetime shows focus on only the news of the day, and they do not engage in issues that are prevalent in our country like rape, theft, early marriages, etc. If I talk about myself, I have been part of media and journalism for more than 20 years, I believe I am to be blamed as well for not highlighting critical issues during my journalism days.

If we talk about democratic systems in general and compare them with capitalism and socialism, was there a policy devised to promote media ethics, and were there any positive aspects of such a policy?

As far as ethics is concerned, I believe that we start learning mannerisms and ethics from school life. Ethics is an extremely broad term, and we cannot confine it only to media. I believe that the ethics portrayed by society are a spitting image of the ethics shown by the media industry. No media owner has signed a charter that focuses on ethics and limitations on what is shown by media. The only concern that I have with the media is that it fails to acknowledge and highlight the needs of the people of Pakistan. Pakistan is a society that is divided into classes. The media fails to highlight the needs of people belonging to the middle/lower class.



Pakistan Television Network – Falling from the Grace

Mohammad Shaaf Najib – Staff Economist, PIDE

November 26, 1964, holds a great importance in the history of Pakistani television. On this day, Pakistan's state-owned broadcaster Pakistan Television Corporation, famously known as PTV, began its broadcast from the pilot television station established in Lahore.

PTV started its operations under a private management, however, majority of its shares remained owned by the ministry of information and broadcasting. After the 1971 war, PTV was brought completely under the control of government of Pakistan. The government then funded the infrastructural and other required developments of PTV under the banner of Communication network expansion.

The initiation of media and broadcasting industry in Pakistan was a huge landmark. Despite being the only player in the field, PTV did not take this up lightly. Instead, it became breeding ground for countless actors, writers, performers, and intellectuals. PTV set really high standards of broadcasting, with its content range including entertainment, news, sports, children cartoons and other forms of infotainment.

PTV programs had quite an intellectual appeal to them, as focus was put on infotainment programs. Gradually, it also developed into a credible source of news and analysis on the current affairs as well as a reliable and realistic commentator on socio-political issues in the country and globally.

This was, unfortunately, the PTV of only the 20th century. The dawn of the 21st century also became the beginning of the downfall of this state-owned broadcaster. Indus TV, the first private owned broadcasting network in Pakistan started broadcasting in the year 2000. The next one decade saw many entrants into the electronic media industry. Seeing competition rise, PTV shifted its focus from an academic approach of its programs to a more commercial one. As a state-owned broadcaster there was always going to be a certain limitation to the

extent of commercial aspect in PTV's approach. This resulted in PTV flirting with its traditional approach as well as trying to adapt to rising competition, but it failed at both. The content quality dropped, and as cable networks grew in the country, viewership numbers staggered.

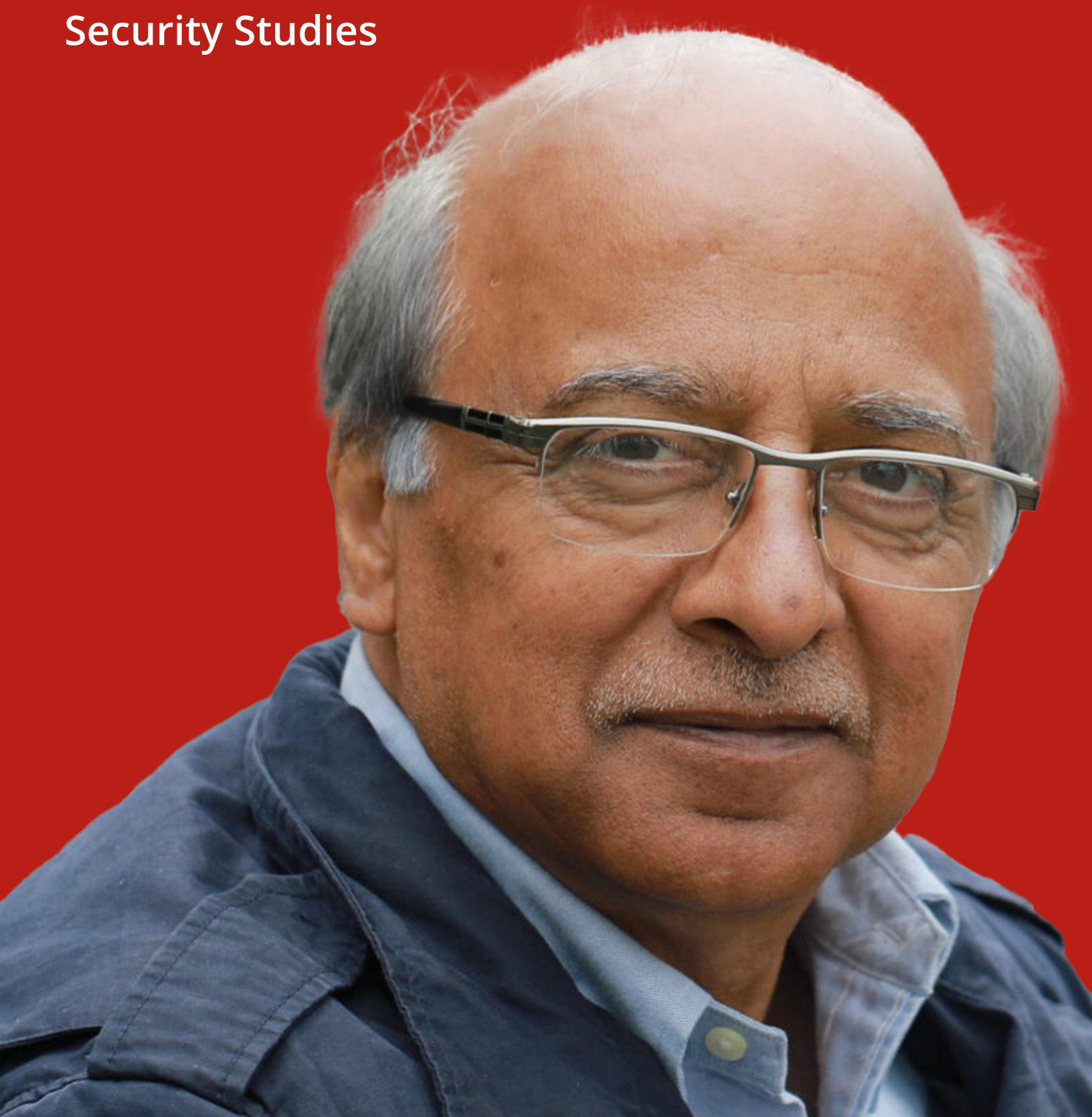
Moreover, as political interference in PTV's operations grew, the downfall quickened. From political appointments at the top management to staff level, merit was compromised at the behest of government members. With the advent of private news media, the governments became more cautious about their image through electronic media. As a result, PTV was turned into a government mouthpiece than a state-own broadcaster. Biased reporting, deliberate misinformation, and other methods to curb the truth and report only government favorable news meant the general populous sought other sources for fact-based reporting. Consequently, not only the viewership kept going down, but the broadcaster also lost its long-built repute among the masses.

People today still recall the golden era of PTV. This is because the standards of quality content that the corporation set in its early decades can still not be matched by the commercially motivated private media, but PTV also seems no way near trying to redeem itself. From being a breeding ground for world class performers, PTV is now famous for its lack of work ethics and lack of respect towards senior members of the industry. Once a source of reliable news and realistic analysis, PTV is considered as nothing more than a government spokesperson nowadays.

PTV's fall from grace has been nothing short of a heartbreak for those who saw its golden era. This, though, is not the first time we have seen any such thing. The story of all state-owned enterprises in Pakistan has been quite similar, and unfortunately this termite continues eating up all SOEs in Pakistan.

Imtiaz Gul

Senior Journalist &
Executive Director,
Center for Research &
Security Studies



You have been associated with PTV and have expertise in that area. You have also worked with international state channels like DW (Deutsche Welle), what do you think are the reasons behind the downfall of PTV as a channel? Is this due to financial constraints or the intense interference of the Government?

One big reason behind this is that PTV remains mired in the way state broadcasters, national broadcasters, evolved during the cold war. Which was more of a propaganda for the government as it worked as a propaganda agent for the state. So, unlike the voice of America and deutsche welle (DW), who were also propaganda organs, but they did all of the work very professionally. For instance, they focused a lot of cross verification of information before broadcasting anything.

In PTV, the main purpose was national broadcasting, but they did not adhere to the fundamentals of journalism. It became more of a mouthpiece for the government of the day

rather than the state. This was a contravention of the fundamentals of journalism. That is how PTV lost credibility with time. It was always talking about the Government, details regarding the president and prime minister were conveyed daily. The entire objective of the news channel was to please the government. When state broadcasters show an overdose of information regarding the present government, people become irritated by the constant hammering of such information. Up till the early 2000s, people were forced to listen to PTV due to the lack of private news channels but with the advent of private news channels people started shifting towards them. This caused PTV to lose its credibility in the world of news broadcasting.

Most of the times, the managing Directors that were appointed by the PTV were journalists, having little to no administrative experience. Due to think this has also hampered the growth of PTV in the last two to three decades?

The cumulative decline in the growth of PTV as a channel was due to the non-adherence to the principles of broadcasting and journalism. Having a journalist an academic or an administrator as the MD, the PTV was hamstrung

by the very fact that it was the mouthpiece of the government. It failed in its function to inform the public regarding everything that was going on, it was majorly focused on the everyday activities of the present government.

It is generally believed that government funds the PTV, and due to this reason, the news channel is biased towards the government? Is this true?

The news channel is not funded by the government. It generates revenue from the electricity bills and the government collects its deficit. PTV is also subject to the PEPRAs rules which causes a lot of financial constraints. The second reason behind the financial constraints

is that the revenue generated by PTV has been shrinking with time, because the news channel is not very innovative and has lost attraction. When you raise an organization with the main purpose of pleasing the government, it kills innovation and productivity.

Any recommendations that you have for PTV in terms of improvement?

First and foremost, we need to change the governance regime. They have introduced intelligence services act recently. Another recommendation would be to have proper performance reevaluation. The channel should also make sure that the people working there

are enough for the programs that they are making. Staff performance should be rigorously evaluated and audited. Most importantly the rules governing the expenditures, finances, they have to be independent of PEPRAs. PEPRAs binds the hands of the administrators, puts

a lot of limitations. It delays matters that are approved at the decision-making level by months by years. Lastly, PEPRA is responsible for

an extremely expensive procurement, it needs to free the broadcasting channels.

PTV does not fall under the ambit of PEMRA, what is the reason behind this?

PEMRA was basically established for private television networks. It was assumed that since PTV is a state news network, it would not indulge

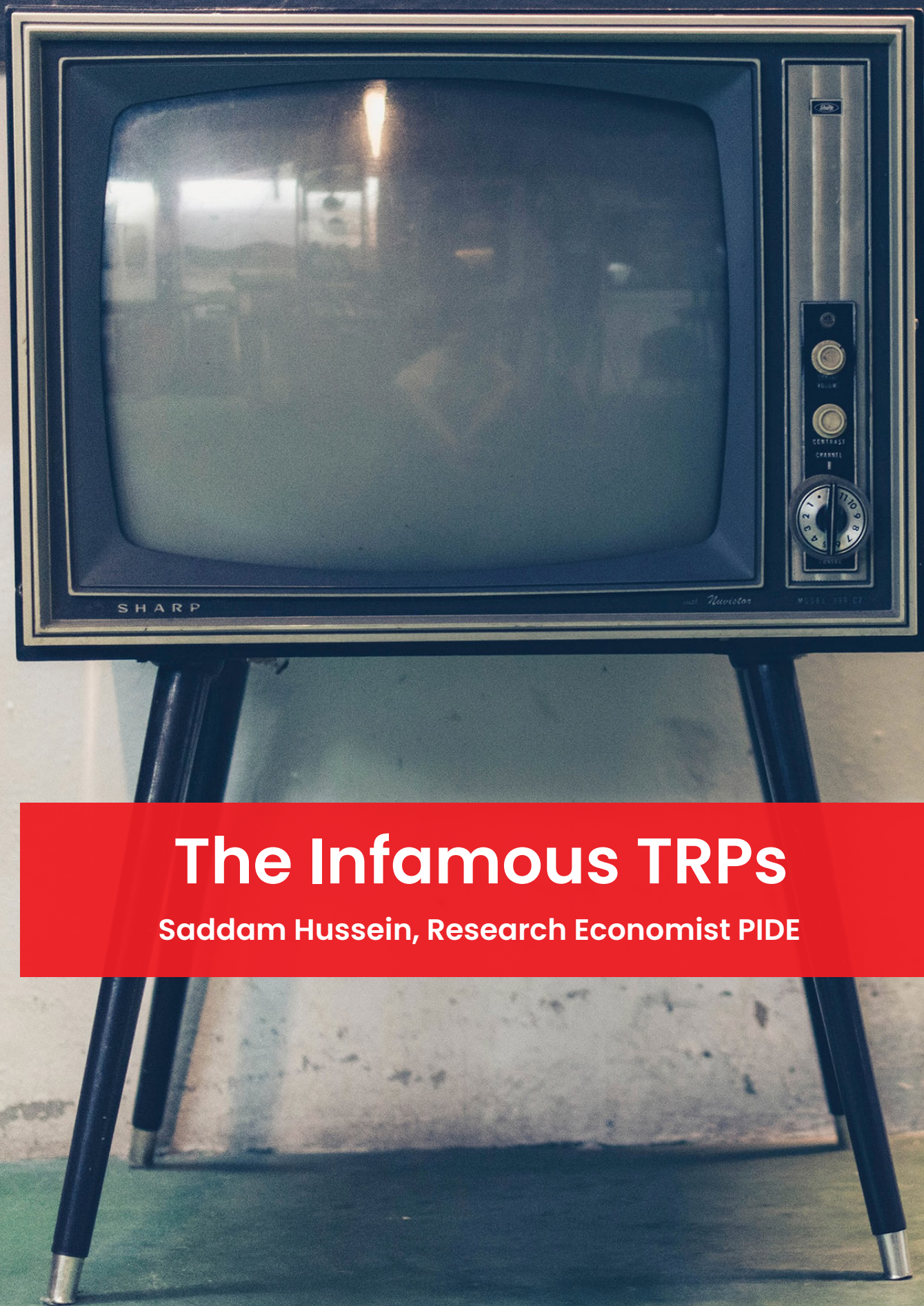
in provocative and violent content. It is a public broadcaster for the benefit of the people so it would not portray any negative news.

TRP systems are becoming common around the world, is there an alternative for this as it is inherently wrong?

TRP systems are common in Pakistan only. As far as I remember I do not think these systems are widespread internationally. These systems

are manipulative but then again this is also subjective and depends on how the TRP systems are being used.





The Infamous TRPs

Saddam Hussein, Research Economist PIDE

Today, television is considered a major source of entertainment and learning for many people, especially the youth. All television programs such as commercials, news, documentaries and cartoon, affects people of all ages in different ways. This is why television occupies an important place in our life and has become an essential household item. Since mass communication has become an essential ingredient in the modern and dynamic society, modernization in the technology sector has allowed man to make tremendous progress in this field. The Television industry became more important in the wake of COVID-19, when the whole world was stuck at homes, TV was one of the main sources of news and information dissemination along with infotainment. One of the methods used by the television industry to gauge the audience's interest in the aired content is analyzing the Target Rating Point (TRP).

Television Rating Program/Target Rating Program (TRP) is a tool used by advertising industries to determine the viewership of a content portrayed on Television, which helps in evaluating the audience's interest and preference of channels and the content they broadcast on the basis of the number of views of the shows.

Different countries use different systems of assessing rating on the basis of their local priorities. A same show can have different ratings for different episodes based on viewership, network, and re-run. TRPs are critically important for advertisers, as this analysis helps them in choosing the right slots to display their advertisement on the basis of the popularity and fame of the show. TRP also helps broadcasters to determine whether their content is getting maximum views or not. If the TRP rating is bad the broadcasters can always modify their content according to the need of advertisers. If the TRP rating is excellent, it gives broadcasters an upper hand in deciding the advertisement charges and generate massive profit out of the content.

Ratings are usually recorded and analyzed by Television Audience Measurement (TAM). In Pakistan, the widely used method for gauging rating is called "Peoples Meter", which helps in interpreting the viewing patterns of the viewers.

Such a meter is connected to the television screens of users and facilitates the broadcaster in collect data through in-built GSM technology. Around Pakistan it has been estimated that roughly According to estimates, around 713 meters are installed in and around Pakistan, which help in monitoring viewership. TAM provides a detailed break-down of the views on the basis of gender, age, occupation, and programs watched. Moreover, program and duration preferences of kids and adults are taken into account. Advertisers form their decisions on the basis of these TRP scales. Higher TRP means more people are watching a specific channel and hence gives an incentive to advertisers to spend more on that specific channel.

However, the methods of determining TRP varies across different countries. In India, the preferred system of ratings is provided by an Indian agency called "Broadcast Audience Research Council" (BARC), which uses a meter called BARO-meter for measuring the ratings. Unfortunately, in India there is a culture of agencies bribing channels in order to get improved ratings hence the overall system is inherently flawed. Though media in India plays a substantial role in shaping the perception of people regarding many important issues, such structural flaws lead to the broadcast of irrelevant and objectionable narratives on the TV, which leads to a failure in supplying legitimate information to the public. Since content is created on the basis of its rating, false ratings provided by the channels leads to airing of bizarre content, which raises questions on the credibility of Indian media. Similarly, US uses a system of ratings called the Nielson Rating System, which follows the same mechanism as BARC in terms of its functioning. Whereas UK uses Broadcasters Audience Research Board (BARB) as the system of ratings, which measure data through Big Data Integration. After proper consultation and statistics obtained from ratings, programs are aired on television. Different advertisement agencies and broadcasters use data obtained from BARB to plan and buy different adverts. Different programs are aired on the basis of these ratings.

With the rise of TRP factors across Pakistan, many questions regarding the type and quality of content aired have been raised. News channels display news that is based on scandal and has

no capability of keeping people informed, due to their lust for higher ratings. PEMRA (Pakistan Electronic Media Regulatory Authority) has been held responsible for not stopping the spread of fake news. Media is generally focused on spreading fast and controversial news which is not useful in the long-term. News bulletins and talk shows are mostly focused on criticizing the ineffectiveness of the government rather than policy-based discussions and solutions to problems. It is important that an unbiased news coverage is supported, and meaningful conversations are highlighted that are focused on solving the challenges instead of only caring about the ratings.

As far the Entertainment industry in Pakistan is concerned, a somewhat similar problem regarding the quality of content is observed. The quality of the content has deteriorated as the focus has shifted towards ratings only. Pakistani dramas and soaps which are supposed to be a source of family entertainment show scenes depicting violence, suppression of women's rights and much more scandalous content, because the audience buys such shows hence, they have better ratings. Ratings drive the content rather than imagination and need, with time it has become more important to generate revenue so that more advertisers can invest in it. Like every analysis framework, TRP has its own set of positive and negative aspects. Though the rating system help companies in targeting the audience based on the popularity of the content and evaluating their return on investment. It enables broadcasting companies to charge higher values from advertisers when there are

shows with higher ratings. The ratings help two major industries; the marketing industry and television production companies. Marketing companies can use the information generated from TRPs to produce ads that are relevant and can generate more revenue.

The biggest drawback of the TRP system in Pakistan is the decline in the quality of content being produced. Only scandalous and controversial content is highlighted just to increase ratings and generate revenue, which leads to portrayal of false news which is not based on proper facts and figures. Pakistani media industry is facing multifarious crises due to this issue. There is a culture of elitism in the media industry as well, where the media channels are controlled by elites and politicians and any news that questions them is not open for public discourse.

TRP is an important and an innovative concept. Though it has both adverse and positive impacts on the media industry, it can be of huge significance if we build upon the positives and stop exploiting the negatives. Its important that ratings are not considered the only important aspect of media and information shared must be factual, with verifiable evidence where necessary. It is high time that the media industry should adopt an unbiased approach and broadcast evidence-based information, to enhance the public's knowledge base rather than gaining ratings. Media shouldn't be seen as a revenue generating business only, it is a huge responsibility, as it can shape the national discourse and character.



The New Wild West

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Arifa Noor
Journalist

It's now universally acknowledged in casual conversations that fewer people are watching news channels. Each time I am forced to tell someone new I meet what I do for a living, they confess (sometimes nonchalantly and sometimes self-consciously) their lack of interest in news channels. Anecdotally, this appears to be a sea change from, say, 2007, when everyone was glued to the television screens, as Pakistan went through one of its most tumultuous years. If the conversation continues for a bit, many even go so far as to explain they don't read newspaper either. News is now delivered to them from their smartphones — it's where they find out about breaking news, where they read analyses and even see the viral clips from talk shows or parliament which are the talk of the town.

It is now not unusual to come across journalists who are willing to admit they don't read newspapers every morning! (My skin crawls when I hear this.) Clearly, technology is changing our lives for sure but also journalism, and the way journalists behave.

But bad habits are not all the digital revolution has allowed us to acquire. Like the Wild West, cyberspace has also allowed many to dream (and sometimes big). Young reporters have quit their jobs at news channels and turned their YouTubing into a steady source of income — the prime minister has even interacted with them, something which was once only a privilege reserved for newspaper correspondents or television stars. It is worth wondering if other political parties follow suit.

Some of the bigger, established, and enterprising, names from television have also turned to social media for a sideshow on YouTube, which must be doing well, as they continue to pour in the effort and time.

But cyberspace talks or discussions are also now proliferating, far beyond physical studios. Websites, individuals, think tanks — encouraged by the distancing set in place by Covid-19 — have all taken to the format once seen as the domain of news channels. Sometimes, this allows discussions on taboo subjects not allowed on mainstream; sometimes it allows ‘taboo’ people to discuss politics or interview politicians; and occasionally, it has led to discussions which then made their way to the mainstream — the spirited debate between Mariam Chughtai and Pervez Hoodbhoy on the Single National Curriculum first took place online before it was then replicated on mainstream channels.

But how much has this impacted news channels? It is hard to say for accurate information about viewers and advertising is hard to come by in Pakistan. Anecdotally, the reach and influence of mainstream news outlets — be they newspapers or channels — has been impacted greatly but who knows what this means in real terms.

However, the adventures in the digital Wild West in Pakistan have led to many YouTube pundits but few website ventures. This is intriguing to say the least. For the experience elsewhere has been a bit different. In the US, when newspapers were first impacted by the digital world, websites such as Huffington Post and BuzzFeed were the talk of the town. Next door, in India, websites such as ThePrint, Scroll and TheWire have acquired a name as well as a reputation. Many of the big names from the days of print are now found on these websites.

At home, we do have a few examples of news websites but with fewer financial resources than what appears to have gone into their Indian counterparts. So far, it seems that digital websites are not attracting the kind of investment which is still pouring into television channels — just this week, everyone has been talking of the sale of one of the biggest news channels of the country.

Perhaps this will change in the coming days because India usually is ahead of Pakistan

in terms of changing trends. I remember by 2000 news channels were proliferating in India (Barkha Dutt was already a household name by then), two years before Geo came on air, revolutionising the news landscape in Pakistan. It interests people such as myself because the proliferating YouTube channels have only further blurred the line between news and opinion. Twitter, talk shows, blogs and now YouTube have made it harder for the older, more traditional outlets to ensure editorial checks and inform readers and viewers about opinion versus fact. For example, talk shows often begin with counsel about the difference between opinion and fact but participants routinely offer a mix of the two. ‘Khabars’ are offered during the discussion and no one is in a position to ask if it has been vetted or double-checked. One-man YouTube channels don’t have the luxury of editorial checks. Journalism used to be about individual as well as institutional credibility but in the modern day, only the former seems to be of importance. In the digital Wild West, the celebrity journalist on YouTube and Twitter, is now the Frontier Hero, the stuff of legends.

But it may not last, partly, because regulations are inevitable, though it’s hard to say what shape they will take. The efforts are ongoing in most countries in the West. For example, the UK introduced an online safety bill in parliament just last month, which was criticised by rights activists. Germany is reviewing a law passed two years ago. Australia passed a law earlier this year which will compel social media giants such as Google and Facebook to pay news outlets for using their content; it’s the first law of its kind and is being seen as a harbinger for what may follow in other countries. All these are pieces of a bigger puzzle, which will fit together to introduce rules to a largely unregulated space.

In the developing world, these regulations will not be entirely consensus-based or for the greater good, unfortunately.

But the changing face of journalism will eventually be influenced by (and even influence) these regulations. Whether these will strengthen institutional journalism or lead to more proliferation of individual efforts is hard to tell. But the Wild West can’t last forever.



Digital Journalism on the Rise

Mohammad Shaaf Najib
Staff Economist PIDE

Media, and particularly news media has evolved significantly over the course of 7 decades. In the early days after the independence, radio was the most common source of news and information across the country. Since the beginning of its transmission in 1964, the state owned PTV remained as the only broadcaster in the country for well over 3 decades. Television, through PTV became the major news and information

source during this time at least in the urban centers in most parts of the country. Print media, during this time also saw a significant increase in its readership nationwide. With the turn of the century, Pakistan awarded licenses to private media channels in the country. This proved to be a revolutionary step in the electronic media sector of Pakistan as within the next decade numerous private media channels were up

and running. With cable networks spreading all over the country, news and information was available to people in real time and far easily. Electronic media became the number one source of all news, information, analysis etc. and a medium of communication as well between the state and its subjects. The print might have fallen behind in the race but remains a large part of the country's news media. Radio's use has been restricted to just far-flung areas of the country with influx of electronic and print sources in urban and rural centers likewise. This was deemed as the future of news and communication globally, but the sudden rise in social media use over the past decade drastically changed the news dissemination and communication mechanisms. Despite all the expansion in electronic and print media over time, the field of journalism in the last couple of decades did become quite saturated in Pakistan. There were very less opportunities for new entrants to enter the field and make a mark. With the spread of social media, globally and in specifically in Pakistan, the younger generation of journalism seems to have decided to adapt to the circumstances and employ new methods to follow their passion.

Digital journalism is on the rise in Pakistan. The new generation of journalists are using social media platforms, including facebook, twitter and youtube predominantly, to share news and analysis with the public. This way, not only have they increased their reach to everyone's mobile phone in the pocket instead of the TV at home in form of electronic media; but they have also freed themselves of the chains of the media house owners and senior journalists. Moving to digital platforms has given these young journalists a direct link with the masses, while the audience response to their content is visible in real time. They do not have anymore have to suffer from the self-imposed censorship of media owners for their business gains or by trying to navigate their way up the industry by buttering the senior journalists.

Majority of the old horses in the field of journalism seem insecure from the increase in digital news journalism in Pakistan. Many a times they are found indulged in unnecessary arguments with the young generation of journalists, usually on social media platforms, and demeaning their analysis and news reports. This is a clear

indication of the fact that digital journalism has shaken the footprint of electronic and print news media in Pakistan. Despite the disliking towards digital media platforms and digital journalists, the veteran journalists have themselves also turned to these platforms. Not only have they made their own digital channels on platforms such as youtube, but they also share their electronic media programs on these platforms. Even print media has been digitalized now as newspapers are available online on their respective websites as well. Pakistan's news media industry has realized the importance of digital platforms in today's world and started adapting to it. The younger generation, however, has taken the early mover adapter and captured a much larger audience. It is important to note, that digital media unlike electronic and print platforms is a lot more transparent as outreach statistics are visible not just to the content owner but also to the viewer. This could be one reason why the veteran journalists seem to be against the digitalization of journalism, as it allows no space to hide behind the manipulative TRP system for impression management. While censorship remains a significant issue in Pakistan's news media, some have falsely accused censorship of their ouster from print and/or electronic media although their content was not getting the viewership their media house asked for. This is evident from the lack of viewership on their now digital platforms as well. Had the public been paying heed to their analysis, the viewership would have transferred to their digital platforms, but that has not always been the case.

Digital journalism is here to challenge all the traditional norms and methods of journalism in Pakistan. Those who have recognized the importance of digital platforms and started adapting to the change will be able to survive in the future, while the rest will soon become a part of history. This brings forward a greater challenge to today's journalist to better their content and analytical quality to establish a reputation among the masses who now have far greater options to depend on for news and information as well as the choice to not view content from anyone.

You can either like digitalization of media or dislike it, but you cannot ignore it. Digital is the future.



New Woes: Digitization and Polarization

Komal Salman
Student BS Mass Communication, NUST

New Woes: Digitization and Polarization

There was a time when mass media became the main source of information. It took the form of a bridge, between governments and people. Later on, it became increasingly independent from states themselves, and politics, although this is still arguable in many parts of the world. Gone is the time when politics was based solely on ideals, adopted from philosophy. In 2021, we are treading in dangerous waters; media logic is often pitched against political logic and ends up victorious. A lot of politics is centered on the media, and on what it says, how it shall react, both, traditional mass media as well as modern digital media.

Speaking, as a matter of fact, intolerance has seeped into every level of our society. On social media today, they have entered a realm that is setting an increasingly dangerous precedent: hate wins.



Unfortunately, the post-colonial hangover is something still very much real in Pakistan today. Not only were lines between ethnicities hardened, even after partition, but it was also made sure that the lines were drawn in a way suited to foreign intervention in a nascent nation which found itself in an extremely important geo-strategic location. Today, in the twenty-first century, despite it being written in stone that ethnonationalism has no future, and is not sustainable, it is still a very real thing in our part of the world. It is fueled and propagated by hostile powers for their vested interests.

The tragedy of identity politics, in both, South Asian and MENA countries is simple: you cannot explain an intangible threat to a largely illiterate, yet zealous population. The onslaught of fifth and sixth generation warfare can be as real as it is today, there may be mass investigations by bodies such as EU Disinfo, but the public at large will not comprehend it, will not actively take a stance against it, or be able to figure out how to put up a fight against it. On the other hand, if a war against an invader or an arch rival is announced tomorrow, nearly everyone would be willing to take up arms, even children

We are living in an era where post-modernism, to an extent, is still ruling. Post-modernism is an art movement that took birth almost a century ago. Artists believed in questioning the 'reality of reality. It allowed art and artists to break free from the shackles of life-like paintings with covert symbolism. Perception is the easiest thing to play in today's world. A single-sided hostile narrative, un-counteracted, has the power to drown the other party, in a quagmire of misinformation.



This makes the domain of propaganda an interesting one to explore. False narratives can have dire consequences. But narratives are supposed to be built in a way in which they can be absorbed. Pakistani social media has reduced it to gender cards, religion cards, minority cards and abuse. Propaganda is defined as information, especially of a biased or misleading nature. Used to promote a political cause or point of view. It is important to understand this concept for several reasons. Knowledge is power. This means information warfare can accomplish strategic, operational, and tactical objectives. Moreover, information warfare is capable of doing so without causing measurable and identifiable damage.

What does politicizing digital media bring about? The one-word answer to this question is polarization. Lately, this has indeed been an alarming trend, particularly on Pakistani social media. Hyper nationalists, leftists, far-right religious parties, communists, insurgents, various political parties, all have their social media teams, whose only purpose is to troll others and put forward propaganda.

We also live in a world where free media has become a myth of sorts. From comics for children, like Bamse, being accused of indoctrinating children with the views of the Swedish left, to Amaq Newsagency, everyone is pointing fingers.



Recently, Reuters dismissed the recent protests in Bangladesh as “Islamic”. We witnessed appalling coverage of protests worldwide, regardless of whether it was the Black Lives Matter movement, pro-Navalny protests or the Farmers Protest in Delhi. Responsible reporting seems to be dying a slow death. If everything on mainstream media is propaganda, where do we find the truth? We used to believe that social media gives us a more “authentic” view. Data-driven journalism is on the rise because even what seems authentic and real, is just pushed. It is no secret that politics is a dirty game. Nor is it contestable that most South Asian countries are democracies in name only: they are in fact plutocracies, where a handful of rich families are running the show behind the scenes, regardless of what is sold to the public. Living in a region as volatile as South Asia, the politicization of digital media is in all its possibility a ticking time bomb. We not only need to be informed and aware of the threat of propaganda warfare, but we also need to counter it. The answer to propaganda is not social media troll armies, it is the systematic removal of red tape, and taking people who are well-versed in these subjects on board with PTV and ISPR.





Electronic Media & Public Policy for Service Delivery

Alisha Imtiaz

Student of BS Economics & Political Science , LUMS

In the current age media has become one of the most integral part of the society. Media interventions use media channels to update and persuade populations. A look into policy making suggests that media can help by setting a plan for the press, the public, and the policymakers to portray information that is important at a particular time. With the unprecedented growth of internet, economic, social, and political activities are now happening on the internet. Social media in general helps to improve the process of policymaking, by helping government to understand how different decisions made on their part can influence a society. If social media is used in public sector it will help to create unprecedented avenues for the government to improve and thrive. Through the use of

media platforms, government services can be extended which will in turn lead to more civic participation, help in decision making process and seek new innovative ideas from masses. Policy makers can use the views of citizens through social media by observing their reaction to a certain policy. Social media can be used by policy makers at the policy evaluation stage by carrying out surveys. Thus, social media offers a massive amount of data that can have a positive impact on policy making process.

For instance, by the use of electronic media especially avenues like Facebook and Twitter, public policy can be improved by the interaction with public on these platforms. By leveraging media into public sector, we can make sure to

make our government more transparent and accessible to general public. E-governance can be an effective tool in improvement of service delivery. E-Governance is government use of information and communication technologies with the aim of improving information and service delivery, encouraging citizen participation in the decision-making process, and making government more accountable, transparent, and effective (UNESCO). By the use of media, a rapid diffusion of federal and provincial governments can occur which can in turn assist in administrative tasks and improve the delivery of public services. Indolence of any governmental organization will immediately become a topic of discussion on electronic media which will force them to work efficiently. Media and internet can help us in a speedy communication which in turn helps us in effective service delivery according to the needs of citizens.

In Pakistan we have seen a crisis in terms of governance due to the lack of proper service delivery. Through the help of media channels and 24-hour news coverage, the incompetency of government to meet the needs of public is highlighted very often. In the recent years, with the advancement of internet, public has been exposed to access level of information. This helps in greater accountability of the government in terms of service delivery as any shortcomings in their part can be immediately broadcasted live. In Pakistan, the relationship between media and policymakers in general is not very effective. Media is generally focused on spreading fast and controversial news which is not useful in the long-term. News bulletins and talk shows are mostly focused on criticizing the ineffectiveness of the government rather than policy-based discussions and solutions to problems. It is important that an unbiased news coverage is supported, and meaningful conversations are highlighted that are focused on solving the challenges of policymaking. Civic engagement is an important aspect of effective governance. It is imperative for us to note down the effect that media can have in terms of promoting public policy. However, in case of Pakistan policymakers in general do not use social media as they do not believe in its effectiveness. This needs to change as informing public of the new policies and how

they are affecting them can have cause a great deal of public acknowledgment.

By the use of platforms like Facebook etc., a policy can be created for direct communication with the public. This can help the policymakers to directly interact with the public and create policies based on the opinions and needs of the citizens. In Pakistan, however a major challenge is the spread of false news through online platforms. For the implementation of effective policies in Pakistan, it is important to have policies that are based on thorough research and authentic information. Through media, citizens can be involved in the policy making process by taking their opinions on policy outcomes. For this to be effective, it is important that credible information is portrayed to the public. Strengthening the dialogue with citizens would raise the level of public awareness and recognition of the government's initiatives aimed at improving service delivery. This would help to focus on the development of more demand-driven policies and services with the greater involvement of public, thereby increasing the efficacy and efficiency of the government.

Benchmarking and monitoring the efforts and improvements made by the various departments could help increase the level of transparency and improve public policymaking in Pakistan. Through media we can identify the improvement and performance of service delivery. This could be a strong driving force for policymakers to continuously improve which will be beneficial in the long run.

In conclusion, a two-way communication within the public service and with general public would suffice for effective service delivery. An interactive platform like social/electronic media will help to promote engagement with government, lead to more public input that can be used for effective policymaking, and cause collaboration and inspire exchange of ideas. Across departments in the public service and between the public service and the general public, information shared must be factual, with verifiable evidence where necessary. Information should be personalized, purposeful, and transparent so a trust between public and policymakers is ensured that will eventually lead to an effective service delivery mechanism.

Terrorism in the Media

Anam Fatima

Research Fellow, Pak Institute for Peace Studies



The mass media play a critical role in shaping people's perspectives on issues affecting their lives. From dictating debates on political, economic, and social issues to influencing public perception of the country both at home and abroad, the media call the shots. For a government, being in the good books of the media is one of the most challenging tasks because what the media report on a government translates into how the common men view the government. A democratic government cannot afford a hostile media because the political cost of media's hostility can be immense. In this backdrop, media shoulders huge responsibilities while carrying out its routine work. Responsible reporting entails balanced coverage of issues. And the Pakistani media outlets have often overlooked journalism ethics in their pursuit to earn maximum viewership.

In Pakistan, the private media have grown exponentially over the past two decades, gradually emerging as the multibillion industry in which corporate interests routinely determine what goes on air and what gets the cut. The plethora of media houses compete with one another for commercial interests as well as favors from the state. Amid this profit-driven competition, the media ethics usually become a victim, and news channels resort to sensationalism to generate following among the public. One prominent tactic of the Pakistani media for hooking viewers was to show graphic contents containing disturbing scenes such as blood, bodies, or mutilated body parts etc. In other instances, reporters would run to funeral homes and ask victims' families to share their opinion on tragedies they were experiencing. Likewise, primetime news bulletins routinely blow issues out of proportions to create hype and sensation among the public.

Though the Article 19 of the constitution of Pakistan ensures press freedom however, broadcast media has misused the constitutional guarantee. As per the social responsibility theory, proposed by Dr. Robert Maynard Hutchison, Vice Chancellor of Chicago University 'freedom comes with responsibility'. But Pakistani media has time and again breached the ethic of social responsibility. It has become excessively commercialized and focused on quickest way to get high ratings for handsome revenues. In this race for profit maximization our media has

become ignorant and less considerate towards people directly affected by tragic instances.

Media has been targeting the grief stricken families, creating more hype and sensation which results in misleading the society. The insensitive coverage of Sahiwal incident is one appalling examples of blatant violation of media ethics. Moreover, various news channels used different frames while reporting the Pakistan International Airlines (PIA) passenger plane crash. This present the dismal picture of broadcast media.

The broadcasters, to cater their corporate interests, have unduly emphasized certain news items. Media has become the hotbed for the spread of fake news. The Digital Rights Foundation, a non-government organization, in its report titled **"Sifting truth from lies in the age of fake news,"** noted that over 80% of population in Pakistan do not consider media a worth source of information. The report also noted that facts are properly not checked in the news room. The spread of fake news, distorted narratives, and sensing headlines have clouded the line between fact and fiction. The vocal defenders of free press have barley analyzed the rationale of media existence and sanctity of coverage.

Nevertheless, it is pertinent to note the role of media in promoting extremists messages. There is a link between media and growing violent extremism in society. An incident loses its potential to create terror without being broadcasted. Thus, media has been an instrument for extremists to project terror among people. A leading analyst and terrorism expert, Bruce Hoffman, has underlined the link between media and terrorism. He argued that

"without the media's coverage, the act's impact is arguably wasted, remaining narrowly confined to the immediate victim(s) of the attack, rather than reaching the wider 'target audience' at whom the terrorists' violence is actually aimed."

Terrorism coverage has been attractive subject for media as it leads to high rating. Media covering incidents of terrorism or extremism is not an issue but the problem lies in the means of reporting such instances. The news reporting about terrorism has traumatized

public by exaggerating threat perception and violent conflicts. Media rhetoric and its biasness toward certain groups has negatively affected the public perception. In a nutshell, media has enhanced the scope of extremist propaganda and activities and became a tool of advancing their goals without any expenses or risk. On one hand, terrorist needs media for free publicity of their cause, on the other hand, incidents related to extremism or terrorism fulfils the media appetite for shocking and sensational news to boost rating and maximize the profit. Regrettably, the media broadcasters have portrayed victimization relevant to everyday experiences.

In sum state needs to look at the extremist's exploitation of social media and devise a strategy to curtail the media related effects of

terrorism. The broadcasters' should maintain the objectivity for responsible reporting. They should impose certain limitations on themselves. Despite hounding victim's family, they should respect privacy. Moreover, government-media partnership is important to counter extremist's narrative. Content moderation is another important tool to counter disinformation. To this end there is a need of media convergence strategies. This will increase the interconnectedness of information, communications and technologies. Eventually reconditioning of the already established industry and work practices will enable the emergence of completely innovative and productive content.

HAVE YOU EVER...

SOCIAL MEDIA BINGO

BEEN ON ORKUT	STALKED SOMEONE	FOLLOWED- UNFOLLOWED MULTIPLE TIMES	ASL PLEASE	MADE FRIENDS WITH A STRANGER
MADE A FAKE ACCOUNT	CREATED EMBARRASSING EMAIL ID	NOT ACCEPTING YOUR DAD/MOM'S FRIEND REQUEST	WROTE A LONG POST	PLAYED FARMVILLE
SWIPED RIGHT BY MISTAKE	BLOCKED SOMEONE	CREATED ACCOUNT JUST TO CHECK SOMEONE	SENT A REQUEST TO FRIEND'S FRIEND	FORWARDED A MEME
TROLLED SOMEONE	GOT TROLLED		MADE A TIKTOK VIDEO	SENT A DM TO YOUR CELEBRITY CRUSH

YOUR TURN 1. _____ 2. _____ 3. _____



Webinar Brief

The Politics of Media Economy in Pakistan

▶ ABOUT THE WEBINAR

Media plays a critical role as opinion-shaper in Pakistan. The burgeoning forms of media in the form of electronic, print, and social media, shape national narratives about politics, society and culture. Also, with respect to economy, the role is becoming more pronounced when factors such as commercialization, advertisements, political economy, TRPs, media as an avenue for culture industry, and digitization are brought into light. In the light of this debate, the current webinar is an attempt to:

1. Understand Pakistan's media economy (Media industry numbers in revenue, Media measurement tools in the past and in present and what media generally covers?)
2. Explain functional regulatory and legal frameworks of media economy in Pakistan.
3. Articulate if Pakistan's media content, especially televised contents reflective of socio-economic and political realities prevalent in the country, or not.
4. Reflect on the quantity vs. quality control of electronic media in Pakistan.
5. Decipher if there is political economy dimension through which media economy can be understood.
6. Understand the process entailing TRPs of televised contents in Pakistan.
7. Respond to a question, "Is media economy politicized in Pakistan?"

▶ MODERATOR

Nadeem ul Haque

Vice Chancellor,
Pakistan Institute of Development Economics

▶ SPEAKERS



Anum Malkani
Director Policy Advisory,
Centre for Economic
Research in Pakistan (CERP)



Aftab Alam
Media Law Specialist &
Policy Expert



Asad Beyg
Executive Director/Founder,
Media Matters for
Democracy & Media Lab



Bilal Gilani
Executive Director,
Gallup Pakistan



Dr. Huma Baqai
Media Analyst &
Anchorperson

Dr. Nadeem-ul-Haque

- Media is just a talking industry without any space for thought.
- Newspapers are crowded with foreign policy, absurd opinions, and statements of politicians and governments, leaving hardly any space for economic, judicial issues and analytical work.
- Media house owners are businessmen, using media houses to assist their business to grow.
- Media is influenced by the Government through ads, lacking ideologies.
- Media enterprises in Pakistan are not profitable but they still survive due to poor regulations.
- Lack of research on structure of media; rating agencies and its methodology.

Mr. Bilal Gilani

- In Pakistan, 70% of people own TV, with 100 million young and adult people watching 120 minutes every day a shift from 240 minutes per day in one decade. Among watched content, 70% of the content is entertainment, with around 150 TV channels currently running, and each year 8 TV channels are added to the toll in Pakistan.
- In Print media, 847 newspapers are recognized by the government, and 163 newspapers are printed from more than one city, regional newspapers are dominant in Pakistan. Around 80% of the Pakistani do not read any newspaper representing excess supply.
- There are around 209 FM stations among these 154 are commercial and 55 are educational /another thematic. Radio

listening declined and was temporarily revised after F.M radio came. Around 10% of Pakistanis listen to the radio.

- Social media is on the rise and after the introduction of 3G, there is an increase by 300% in social media users. 12-13% of Pakistanis were using the internet in 2016 and now it has increased to 30% adults. 60% of Pakistanis don't have smartphones.
- Viewership of media in Pakistan is concentrated to 4% in Newspaper, TV media, radio and news websites and few owners are controlling the market, have cross Media ownership and hence thought control is possible in Pakistan. 80% of the market players who don't have viewership are surviving despite the market conditions.
- Total advertising revenue in media is 58 billion PKR, Government share in advertising was 10 % in TV, it was a cash-based economy, Govt. would inject cash leading to manipulation. Government advertising share in newspapers is unknown and for the last two years the share of government in the advertisement has fallen to zero percent leading to the closure of several newspapers, and 50 newspapers were notified to be closed in the past year.
- Advertising expenditure in Pakistan is on a decline in TV media and newspapers and it is on the rise in digital media, there is a lack of other forms of funding.
- The total estimated revenue of the media industry including advertisement money, revenue from subscriptions, and other sources is around 125 to 150 billion PKR.
- Revenue of the media industry is small as compared to its influence and importance.
- Ratings are just representations of urban Pakistan and rural areas are excluded from the rating methodology. Players in the market manipulated the rating samples to get favorable results. The sample size is just 2000 that is representing the whole population, and hence an absurd system/method is adopted for media ratings. The rating observed through these samples and methods is used to award advertisements to the said channels. Rating systems operate just like a mafia in which big players set the stage lacking reasoning.

- TV broadcasters solely relied on advertisement money and have no other source of funding for their operations. The rating system is complex and lacks a proper and transparent mechanism. Govt. is now in control of rating and advertisements and hence plays a huge role.
- The lack of transparency in funding mechanism, absence of competition, and absence of implementation of the law, absence of these three elements is a challenge for all institutions in addition to the media industry.
- Information is a public good and the media should be consistently looked upon from the perspective of providing information as a public good.
- The business model of rating companies is entirely dependent on media houses. The revenue of TV channels is entirely dependent on the advertiser. So, the monopoly of advertisers under the name Pakistan advertiser society, this society bars the members to buy ratings just from the rating company approved by the society.

Ms. Anum Malkani

- People are moving away from TV to social media. About 50% of the peoples in the west access the news from different social media platforms. It is also true for Pakistan due to increasing smartphone penetrations, broadband access, and 3G-4G access.
- The increasing influence of social media has enforced government to think about how to regulate online platforms.
- Regulators in Pakistan are more concerned about controlling the platforms and identifying the users and consumers, in order to control the promotion of bad things through online platforms. This is evident from the rules, regulations, and legislation put forward by the government which in addition to surveillance also leads to content regulation and overreach vis-à-vis user data.
- Such regulations also affect the local IT industry and technology sectors who have created an ecosystem of content creators, freelancers, and influencers along with ecommerce via social media platforms, and

have found ways to generate revenue in an already difficult economy.

- Government need to identify and realize the activities that are taking place on online platforms and let the positive activities flourish.
- PTA needs capacity building and technology up-gradation to understand how the technology sector works and digital platforms work.
- Social media platforms provided the space for voices who were not allowed to or couldn't voice their opinion on traditional TV media. This has led to a wave of regulation to control digital internet media.

Mr. Asad Baig

- The structure of PEMRA does not let the media industry to flourish and generate revenue and hence become independent. Furthermore, providing tools to manipulate and influence media content in small and media industries at large.
- Ad-spent on TV is on the decline for the past three years without any chance for recovery. Due to the absence of subscription revenue and absence of brand partnership they are unable to generate the revenue for themselves on their own.
- Direct to home (DTH) is absent and a parallel economy emerged which acts as intermediaries distributing the media such as cable operators who are earning 200% of the Pakistan TV advertisement economy instead of the content producers.
- Target rating points (TRP) have some issues. When media logistics publish TRP they mention that their data sets are not national representative and the data sources are also missing, that is they need to publish from which cities the data is collected and its methodology.
- Digital Ad revenue is increasing and is now 50% of the TV ad economy. This isn't a good thing as the Big Tech (Google, Facebook, Instagram, etc.) are getting a major share of this revenue. In other words, our 50% of the TV ad revenue that is now in the digital ad is going to Big Tech and this figure will continue to increase to 80% in the next five years.

- Big Tech is now held accountable as the case from Australia and is made to pay the Big tech for news and journalism around the world. A big question for Pakistan is how to make big tech contributions to the viability of the media industry.
- Policymakers are old-fashioned and have no clue about the current digital media scenario which is evident from their digital media legislation.

Mr. Aftab Alam

- Privatization and liberalization of the markets have led to informal markets such as cable operators.
- In 1992 International Telecommunication Union (I.T.U) issued a directive to all its member states to open its communication and information sector for private players, and new private TV channels launched in Pakistan.
- In the 1990s PTA started issuing licenses for cable operators, When PEMRA came in 2002 there were around 1800 cable operators in Pakistan. Who was initially regulated by PTA and afterward were regulated under the regulatory framework of PEMRA.
- The legislative framework of regulatory bodies was drafted by donors. The ADB and the World Bank were operating a program "Access to Justice" in Pakistan, due to which the state was under obligation to do certain legislation, along with the binding from I.T.U resulted in the emergence of PEMRA.
- Until 2007 the cross-ownership of the media was banned, in 2007 cross-media ownership restriction was removed and today 4 media houses cover 80% of the market as the result of removing this restriction and an undue concentration of media ownership exists. Due to this concentration, it is way easier to control the media in Pakistan.
- The flaw exists in the regulatory framework which allows such concentration and activities to flourish. There is a lack of research on the markets by regulators and hence no strategies are developed keeping in view the prevailing situation of the market. The advertising market is not regulated by regulators. Instead of regulating the market, PEMRA is focused on content regulation.

- The emergence of electronic media also led the print media to grow in the case of Pakistan.
- Based on rating the media houses are granted advertisements, big players try to manipulate the rating process to get more revenue.
- In 2018 PEMRA put forward regulation regarding TRP "Television Audience Measurement rating services regulations" under which PEMRA's role is to issue licenses and methodology according to which rating companies will function. There is nothing concrete in the regulations regarding TRP put forward by PEMRA.
- While media can be controlled by controlling the cable operators. If a sound decision regarding DTH is taken by the regulators the unfair practice of the cable operators can be controlled and the issue of media concentration can be addressed.
- Digital internet falls under the control of PTA instead of PEMRA due to lack of legislative framework. As PTA is interested in the regulation of content than promoting fair competition raising further issues.
- A monopolist mindset exists to control the media so that the opinion of the masses can be controlled. Even in the U.S.A, some lobbies control the media. There is a new trend among media houses of having cross-ownership of educational institutes. To influence young minds.
- Privatization of the media has made things worse as they are controlled by those who push vested interest. As private media houses are funded by private corporations so they are not interested in looking into their role in society.
- An information vacuum is first created and then that vacuum is countered with fake information.
- Regulators of the media industry PTA, PEMRA, and Competition Commission of Pakistan are involved in activities that concern content control instead of promoting fair competition in the market. The people should decide what they want to see and what they don't and regulators should focus on enabling a fair market condition.
- Until 2018, 250,000 people were employed in the media sector as compared to 2000 people in the year 2002. The number of working journalists in 2018 is 18000. In the past three years, around 8000 journalists were unemployed due to various reasons.
- Five companies are licensed to conduct the rating business in the country.

Miss Huma Baqai

- There is a government influence and intervention in media operations and functioning. Those journalists who are critical to the government and military establishment are not allowed to do their programs.
- The basic role of the media was to provide consumers with a choice and valid information so that they could make informed decisions. This role of media has completely perished.
- Regulatory bodies control the media in Pakistan, now the government is trying to control digital media.
- Disinformation campaigns are using 0.005% to 0.5% of truth and then manipulating the truth to alter the behavior of consumers. We don't have the tools and strategies to counter the campaigns of disinformation.

Way Forward

Academically, the need is to produce knowledge by conducting multi-method, multi-sectoral, and multi-analytical research on Pakistani media.

Granularity in research on revenue generation, regulatory frameworks, rating system, the politicization of media, and politics of media economy in Pakistan are some of the untrodden areas for future research.



Begging to Preserve “Dead capital”?

Nadeem ul Haque

Budget time is approaching! The usual demands of the government will hit newspapers!

It surprises me that after 64 years of poor economic management, failed policies of bankers and bureaucrats, and failed budgets, we continue to expect wonders from our budget.

I say forget the budget! It is only a speech full of promises that are forgotten the day after the speech has been delivered. In our history no budget has been adhered to for more than a few weeks. The budget document has no sanctity.

But the economy is in a deep recession—percapita income is by all estimates going to decline. Poverty is on the rise. When per capita incomes go down poverty will increase! There is going to be pain among the dispossessed.

What should we do? Well the policymakers--bankers and bureaucrats-- are going to do what they do best---beg some more and follow the master's (donor) advice.

But for the rest of us we should think some more and raise our voices for change. Those who have the privilege (not the skill) of making policy keep intact the system of rentseeking, privilege and corruption.

Rest of us who are ashamed of our continual begging must look to alternatives. Surely a nation of 200 million with a nuclear bomb can have a little more self respect and be turned off by our policymakers panting for aid in every corner of the world. They even beg from tiny UAE and Qatar!

History and economics (skills considered useless in government) show that we can use our 'dead capital' to generate growth, revenues and jobs at home. "Dead capital" can be defined as potentially valuable assets that are currently not being used productively. Some examples:

1. Governor houses (I can count about ten around the country) which are now occupying city center space tax free and at huge budgetary cost. We can convert the governor's mansions to high end hotels and make some money while using their extensive grounds for commercial development. I can envisage at least 1 billion dollars if we were to allow better utilization of these properties and 3000 jobs.
2. City center government property should be immediately privatized and made available for big time mixed use development ranging from hotels, shopping malls to apartment blocks. Areas such as Mayo Gardens and the 3 GORs in Lahore (government housing), parts of F 6/3 and the whole sector above the Marriott in Islamabad could be developed into expensive revenue yielding high class commercial developments. To this should be added the land that army VIPs are enjoying such as their various houses and messes in the middle of the city. Many of the provincial cities too have considerable land the government is occupying for non commercial purposes such as housing bureaucrats both civilian and military. My crude estimate is that sales of these properties could fetch upwards of 4 billion dollars and 8000 jobs.
3. Then there are large tracts occupied by government training institutions. NDC, Staff College, Naval War College, NIPA. Civil service academy in Lahore all come to mind. Why can they not be moved to Quetta or Kohat and this land freed once again for serious development? I can easily see about half a billion dollars from this and 2000 jobs.
4. Then of course there are the stadiums which occupy huge tracts and are not used for entertainment. Instead their walls are being used for shops. Neither a stadium nor a shopping mall, this is a most egregious waste of resources. If we were to merely demolish Fortress Stadium in Lahore and make a multipurpose facility to include hotels, shopping malls and a convention center, the exchequer could gain by few hundred million dollars and 3000 jobs could be

created. Better utilization of our other stadiums as well as the convention center in Islamabad could generate revenues of about 50 million dollars annually and 2000 jobs.

5. A large part of city center land is given over to the elite for their entertainment at subsidized rates. This includes the polo ground, golf courses as well as club such as Sindh club and the Punjab Club. If the peasant's land can be acquired for DHA, why not take over these rich man facilities for serious commercial development that relieves our debt burden. This could be a large bonanza yielding many jobs. We could even build libraries and community centers on this land.
6. Creative destruction could yield a huge bonanza too. Take Gulberg Market, liberty in Lahore, Jinnah super market in Islamabad! If we merely find a way to turn these relics of another time into modern assets, dead capital can be converted in to gold. For example, liberty is a huge area which could house a beautiful modern multi level shopping mall as well as hotels, apartments, offices and parking. I can easily see about a hundred million dollars increase in our GDP over 2 to 3 years plus and 5000 jobs from this project alone. Use of this concept in other places could mean more output, revenue and jobs.
7. Strangely enough we still have anachronisms like the CSD on the Mall road of Lahore in an age when we have hypermarkets coming into town.
8. Still more creative destruction! Our cities look dated and decrepit because our silly bureaucracy does not allow renewal. Housing stock has normally an average age of 20 to 30 years. Zoning also needs renewal each generation. Yesterday's suburb or housing could be today's commercial hub leading to large valuation gains. As I have been arguing for many years, our zoning laws are antiquated and anti development. Allowing our housing stock to be renewed from low slung kothis to high rise flats and commerce in all our cities from Karachi to Kohat could be a big bonanza. I think this could be huge leading to an acceleration of growth of about 2 percent per annum for about 20 years.

There is more but I am limited in space. With so much dead capital lying around, why do we beg with dishonor? My calculations suggest with these simple changes GDP could double in about 15 years or less! Not to mention the growth of construction, hospitality, retail and ancillary industries. Of course our rich and famous would be a little uncomfortable!

Let us be clear to keep the party going for our rich and famous including our policy makers –bankers and bureaucrats—we are forgoing billions of dollars and hundreds of thousands of jobs. Poverty persists because of their failed policies which do not address dead capital.

Indeed not only are we forgoing earnings we are shamelessly begging for more debt! Will someone educate our policymakers –bankers and bureaucrats? Or could it be that we do need some learning and research in policymaking?

The media could give this demand for reform the headline instead of announcements of the alms that we get!

Monetization: How Valuable is Your Bureaucracy?

Nadeem ul Haque



For decades now the issue monetization of perks has been on the table. No action has been taken because the powerful secretaries who monopolize access to perks block the reform and because our austerity mindset keeps us from financing a reform that accelerates growth and employment. This reform is most necessary in housing because the current distribution is iniquitous and because its holding back economic development and employment. Let us see how!

Inequity

- Recall government-owned accommodation such as houses, bungalows or apartments located in the posh areas of metropolitan centers. The location and addresses themselves are prestigious and symbolizing power. What is less well known is that not all civil servants get these houses. Of the 447155 civil servants,
- 8% have the privilege of getting government-owned accommodation such as houses, bungalows or apartments located in the posh areas of metropolitan centers;
- 20% are living in government hired accommodations,
- the rest, 72% are getting house rent allowances which are equivalent to 45% of basic pay in Islamabad and some big cities while in smaller cities the allowance is 30%.

These disparities in entitlements have adversely affected performance in many ways.

- Competition for the scarce resource happens through means other than performance on public service delivery. Performance on the job is no longer a focus.
- Officers are distracted from their function and performance and focus in getting their privilege. Hence they are compromised.
- The availability of good housing is also be a control device.
- Coveted housing such as in the posh areas of Islamabad, Lahore and Karachi could have a rental value of Rs 300,000 whereas the comparable allowance that is given to a comparable officer who is not given a house would be in the range of 45,000. Taxes exacerbate the situation: The officer with the house pays no income tax on the Rs 300,000 compensation he gets while the latter does.

No transparency in expenditure on maintenance of housing

Government budget figures do a great job of hiding the cost of maintenance of these houses. It is well known that over the years, the powerful have been able to do more to their housing such as making additions, expensive renovations, even swimming pools and of course building boundary walls etc all at tax payer expense. When asked all divisions deny any knowledge of where this expenditure is. They are absolutely unable to quantify it.

Given the lack of information, I think we would not be wrong in putting forward the hypothesis that maintenance expenditures are likely to also be distributed in a manner that is inequitable, wasteful and sets up perverse incentives.

Monetize for growth.

The Framework of Economic Growth (FEG) that the National Economic Council accepted in 2011 put forward a major innovation in the development narrative of the country. Recognizing the importance of cities in development and the large excess demand in all areas of city activities --housing, schooling, public places, commercial, leisure--FEG suggested a shift in paradigm for our city development. FEG argued for a move from current car-friendly, suburban-sprawl approach to cities characterized by increased density and high-rise, greater availability of mixed use and less use on cars and more walkability. A move in this direction would unleash a construction boom

which will be employment friendly. Moreover, a high level of construction activity would have huge spinoffs which would create further growth and employment opportunities. In addition, as history has shown, the newer cities with increased commercial, community and public space can be expected to lead to innovation and entrepreneurship.

An important factor holding back this vision that was embedded in the FEG is the large hold of the bureaucracy on urban development. Not only are all the zoning and building regulations in urban areas controlled by the bureaucracies -- army and civilian-- they also occupy most of the prime land for official housing and for giving free plots to themselves.

Be that as it may let us examine the possibilities emerging from monetization. .

Monetization in Islamabad

When I was at the Planning Commission in Islamabad, we estimated the gains from a monetization of housing reform only in Islamabad.

Cost:

The reform would begin by adequately compensating all civil servants so that their welfare is not reduced. Previous pay commission recommendations have failed because they recommended giving them only the existing housing allowance which was a mere fraction of the rental value that the powerful were getting. It is no wonder the reform was blocked.

A better approach that is used in most countries was also considered. Link civil servant salaries to the market through periodic salary surveys of the relevant private sector. Of course a certain discount would apply and that would be decided by policy. This is a preferable approach as it gets rid of the many allowances that have crept into the system over the years.

Our estimates suggested that the cost of this reform would range from about Rs 30 billion annually (restricted to housing monetization for grades 17 through 22) to about Rs 165 billion (if all grades included). Changing the system would cost about Rs 140 billion annually since it would change the relativities within the system. Please note those figures are probably upper bounds since we are assuming that no reform such as changing the size of the civil service is made.. Of course a fuller reform would be able to control these costs with better outcomes.

Value if business as usual:

The moment you mention this reform, many factions start salivating since the land we are taking about is the most prime in the country. For example the incumbents would like to grab it at book value pocketing a huge gain.

What we want is the land for complex, high rise, investment and employment friendly construction. For that the current use of housing in fact is a waste and needs to be urgently discontinued. CDA estimates suggested that about 864 acres would be available after if all these government houses were vacated in Islamabad. Importantly thus land is available in large parcels of about 20 to 50 acres. Given CDA planning, finding such parcels for commercial development is now almost impossible. Such fragmentation has destroyed construction possibilities and hence eroded value.

If we go the route of the usual CDA planning and sell this land in small housing parcels, the value is estimated to be Rs.233 billion.

FEG Build for growth approach:

Assemble the land into large parcels for mixed use complex development. Zoning building laws would be changed to accommodate such construction.

Even with a generous allocation (about 50%) for common areas and amenities, about 423 of the 864 acres would be available for complex modern development. Note that Centaurus has been built on 5 acres with an investment of Rs 50 billion or USD.5 billion. Let us say we build the equivalent of 80 Centauruses on this land we are looking at an investment potential of USD 40 billion.

With generous height and use rules, it was estimated by the best experts available that this could result in an investment potential of Rs 6 to 10 trillion. This is equivalent to about USD 60 to 100 billion or 30 to 50 % of our GDP.

Jobs:

Looked at from any perspective these are staggering numbers. If the construction of each of these buildings directly involves about 3000 workers and indirectly another 3000. We are talking of about .5 Million new jobs.

It is estimated that up to about 60 million square feet could be added in Islamabad through this construction boom. Even if a third of it is devoted to flats we could add on well over 15000 dwellings to the housing stock. Let us say each apartment generates .5 job to service it, we are talking of over 75000 jobs.

If the remaining commercial development eventually yields 1 job for every 1000 square feet, about 40000 jobs will be generated.

The numbers are so exciting I do not know why we all do not come in the streets and ask for this long overdue reform. We are begging for aid which is given to us in dribs and drabs with hardly an impact on the economy. Here we have billions of dollars of investment at our feet.

Growth: Think about it! This development if done well without bureaucratic interference could take 10 years. Let us take a straight line approach, investment would increase by 3 to 5% of GDP annually. Based on our existing growth-investment relationship, this could increase growth by 1-2 % annually over and above other initiatives.

The value of bureaucracy: So the current comforts of the bureaucrats are costing us about 3-5% of GDP in forgone investment, about a million jobs, and 1-2% of growth annually. Think about it are they doing that valuable a job?

Finally this is in Islamabad alone. What if we could do it in the whole country? It would transform Pakistan. Now do you see why we argued for it vociferously in FEG,



Monthly Round Up

Afghan Refugees: A Looming Crisis

Abbas Moosvi

As the United States makes haste to withdraw its military presence and oversight from Afghanistan, the newly created vacuum of power is rapidly being filled by the Taliban – who are scrambling to wrest control of important regions including Kandahar, Lashkargah, Kunduz, and Herat from the Afghan National Army. Over the past five months, the Taliban have gained control of the entirety of the southern and western parts of the country – over 150 districts as per latest estimates. Today, the Afghan government only retains the central and northeastern regions, and those too are on shaky grounds. Violence and bloodshed are once again rampant, with the Human Rights Watch reporting entire villages being burned to the ground, schools destroyed, hospitals blown up, and large swathes of people displaced, arrested, or killed – particularly in the northern areas. These developments have important consequences for Pakistan, with domestic estimates of fresh refugee inflows estimated at around 700,000–800,000 – adding to the tally of Afghans already present in various areas of the country from previous migration waves. (Haq)

Pakistan has had a long history of hosting refugees from across the Durand line (Af-Pak border region), starting in the early 1980s in the aftermath of the Soviet invasion and becoming

a recurring pattern every few years due to instability and conflict: the second wave in the 1986–1989 period as the Soviets withdrew, the third wave in 1996 when the Taliban took control, and then again post 9/11 in 2001. In a report by the UNCHR in 2005, it was estimated that a total of 3,049,268 Afghans were present in various parts of Pakistan at the time of the study – making it one of the largest refugee hosts in the world. In 2015/2016, this number shrank slightly – going down to 2.5 million, 1.5 million of which have attained official registration while the remainder have not. A significant number of these individuals reside in refugee villages set up by the government of Pakistan, mostly in KPK and the newly merged districts (formerly FATA), but the majority (> 1 million) of registered refugees have located elsewhere. (Borthakur, 490–491)

Naturally these inward flows have led to shifting demographics, sometimes in a drastic manner. For instance, Sindhis in Karachi were estimated at 60% in 1947 – in 2017, they stood at just 7%. Furthermore, “Afghan refugees, as a proportion of the population, are larger than the combined total of the three indigenous ethnic groups of Baloch, Brahui and Pakhtuns in Balochistan.” (Borthakur, 492)

Afghan Refugees per Province

[JSON](#)

Location name	Source	Data date	Population
Khyber Pakhtunkhwa	UNHCR	31 Dec 2020	834,387
Balochistan	UNHCR	31 Dec 2020	327,247
Punjab	UNHCR	31 Dec 2020	168,351
Sindh	UNHCR	31 Dec 2020	66,111
Islamabad	UNHCR	31 Dec 2020	35,003
Azad Jammu & Kashmir	UNHCR	31 Dec 2020	4,341
Gilgit-Baltistan	UNHCR	31 Dec 2020	5

Source: UNHCR

This is besides the plethora of other problems, including rising sectarian rifts within host communities, frictions between ethnic groups, and a flourishing arms and drugs trade across the border region. On the other hand, however, a substantial proportion of these refugees become economically active – contributing immensely to the country’s exports and GDP

growth more generally. For instance, the trades of gemstone and carpet weaving is largely dominated by Afghans – with the former generating USD 27.5 million in exports over the period 2015–2020. Further, Afghans dominate certain sectors in Karachi – including waste management, disposal and resource recovery, and transportation. (Ahmed) In 2006, the

government of Pakistan opened up the option for Afghan refugees to obtain a 'proof of registration' (PoR) card – which recognized them as “Afghan citizens living in Pakistan who were entitled to live and work for three years,” allowing them to “open bank accounts, obtain driving licenses and mobile SIM cards”, thus making commercial activity and business easier. (Khan, 52) However, there are still stipulations in place which require refugees to give up their PoR cards and have them replaced with Afghan passports in order to access certain facilities, such as scholarships for higher education – thus foregoing the benefits that come with the PoR. (Khan, 52) Further, the widespread notion that refugee communities generate criminal activity does not seem to be supported by empirical data – for instance, a mere 134 out of 10,000 cases that appeared in the Khyber Pakhtunkhwa court from 2014–2016 involved Afghan refugees. This viewpoint, therefore, appears to be fueled by an irrational sense of xenophobia and hostility rather than actual fact. (Khan, 50)

In the latest moves to accommodate refugees, the Interior Ministry has declared that it will strategize in a manner similar to Iran – whereby refugee communities will be stationed at the border zone and be offered a degree of protection via the Pakistani security forces, but that that will be the extent of it. This approach is unlikely to be sustainable, as the sociocultural linkages that Afghans have within Pakistan are significant, not just in Khyber Pakhtunkhwa but also Karachi, a region the population of which is 15% Pakhtun, – and sooner or later there will be growing frustration with the state of affairs and a general push for entry, whether that is through legal or illegal means. (Ahmed) A better approach, therefore, would be to design a comprehensive strategy that deals with integration, repatriation, legal provisions for commerce, a collaborative border control agreement between the two countries' militaries, and generating fundraising channels from international humanitarian organizations in order to cushion the costs associated with hosting refugees. In other words, rather than a

one-size-fits-all response, a set of conditions ought to be generated for entry past the border, permission to move freely, commerce and entrepreneurship, access to health and education, and shelter arrangements. PoRs also ought to be rethought and standardized, whereby renewal processes/conditions are established well in advance rather than being left ambiguous, something that has in the past left room to utilize refugees as political tools for purposes of bargaining when relations with Afghanistan seem to be deteriorating. (Hatam, 3) Alongside this, agreements with the Afghan government with regards repatriation processes must be established – whereby any losses that refugee communities experienced during the time of migration, which are causing a reluctance on their part to return, ought to be adequately compensated when the situation at home begins to improve. (Khan, 61–65) In this way, a series of 'pull factors' ought to be introduced by the government in Afghanistan that incentivizes return in the future, including “freedom from arrest and torture, access to food, healthcare and basic shelter in the place of origin of the returnee, right to education, and equality before law.” (Hatam, 11) These amenities will help reintegrate displaced communities, and the process could be streamlined with the assistance of donor agencies and the international community at large.

On a broader level, concessionary agreements with the Taliban (and other non-state actors) in the domestic sphere ought to be put on halt – and all signs of collaborations or sympathies must be suspended. This will likely come at some cost to Pakistan, considering the nature of geopolitics in the region – i.e. the Taliban are the only viable means for leverage as far as Pakistan is concerned due to other important Afghan actors (such as Ashraf Ghani) being aligned much more strongly with India. This must, however, take place – with the objective of, if nothing else, signaling to the international community that terrorist activities/intentions that put lives at stake and derail the economy will not be incubated under any circumstances.

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Nadeem Haque

@nadeemhaque



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Monthly Round Up

Code Red for Humanity: IPPC's Latest Warning on Climate Changing

Abbas Moosvi



"When it comes to action, we are still in a state of denial. The climate and ecological crisis has never once been treated as a crisis. The gap between what we need to do and what's actually being done is widening by the minute."

–Greta Thunberg

IPCC Report, 2021

On the 7th of August 2021, the Intergovernmental Panel on Climate Change (IPCC) – a subsidiary organization of the United Nations dedicated to shedding light on climate threats – released its sixth assessment report. In what can only be described as the most significant alarm bell from the scientific community to date, the document outlines the salient climate-related developments (or lack thereof) since its last publication in October of 2014. (IPCC, 1-42) Below are its main points:

- It is now beyond any doubt that human actions have led to increased temperatures and carbon concentration, and that too at an accelerating rate across time – this is true for the atmosphere, ocean, and land
- The deterioration in ecosystems has created conditions that are unprecedented in terms of their severity and the threat they pose to all life – and even the most effective responses today would fail to prevent some of its most serious effects
- No region on the planet has managed to escape the fold of climate change – this is evidenced by rising rates of "heatwaves, heavy precipitation, droughts, and tropical clones" all across the globe
- Global warming increases the possibility of "low likelihood, high impact outcomes" and will lead to catastrophic events that are more severe, last longer, and affect more areas than anything observed in history

The key takeaway from the report is that net zero status on global emissions will have to be reached by 2050 if global warming is to be kept under 1.5°C – as per the agreements of the climate summit in Paris, 2015. What this means is that removal of emissions will have to match or exceed their entry into the atmosphere, a

feat that will necessarily require radical shifts in the way societies are structured. In particular, "fossil fuels must be phased out, energy needs to be used more efficiently, and we need to shift from fuel to electricity wherever possible." (Metz) Renewable sources of energy will be indispensable in this regard, and there will be a political aspect to this struggle – whereby the fossil fuel industry will need to be strictly regulated and curtailed in the near future.

Pakistan's Vulnerabilities

For the developing world, which is most vulnerable to climate change, this report ought to be received by leaders as a call to action – an emergency that is real, deadly, and hovering over our shoulders. This, of course, is not the first warning Pakistan has received – with several scholarly publications over the past few years documenting the effects of climate change within the country's borders. These include, but are not limited to, declining levels of water availability (going from 5600 cubic meters per capita in 1951 to 1200 in 2003) which can adversely impact agricultural yield in the coming years, rising average temperatures, enhanced levels of precipitation (increasing more than 25% over the past century), and more frequent/severe droughts as well as floods. (Khan et. al, 411-413) This is not to mention economic losses, which were valued at \$3.8 billion by a report from Germanwatch in 2020. These affect a wide array of sectors, including "agriculture, livestock, forests, and fisheries, industries, transport, etc." (Khan et. al, 413) Further, it is estimated that almost 10,000 lives have been lost as a direct consequence of climate change, linked to the 152 "extreme weather events from 1999 to 2018." (Abubakar)

No.	Climate change vulnerabilities	Reference
1	Continuous flooding (post-2010)	(Abid et al. 2016b)
2	Severe droughts across country (1999–2003), temperature rise, lack of water resources, and pest-diseases	(Hussain et al. 2018)
3	Recent drought in Tharparker and Cholistan (2016)	(Change, M. of climate 2015)
4	Intense temperature rise (heat wave) in Karachi (July 2015)	(Chaudhry et al. 2015)
5	In 2015, nearly all main types of natural disasters, earthquake, drought, flood, heat wave, and cyclone, were faced by Pakistan	(Hassan and Adnan 2016)
6	Substantial rainfalls with hail storm on March 4, 2016	(Ghazala Qaiser 2016)
7	Snowmelt flooding (2005, 2007, and 2010)	(Afzal 2012)
8	Waterborne diseases (cholera), vector borne diseases (malaria), and dengue fever are presently prevailing with the changing, temperature, humidity, rainfall pattern, etc.	(Ahmed et al. 2016)

Source: Hussain et. al, 48

Current Initiatives

Pakistan's climate change response, in broad terms, is guided by the Pakistan Climate Change Act of 2017 and the National Climate Change Policy of 2012. The latter is a set of initiatives to tackle and mitigate climate change through a multisectoral approach, focused around "energy production, transport, urban development, human health, forestry, and disaster preparedness." (Ahmed et. al, 2-3) The former, on the other hand, was a bill passed with the objective of streamlining the implementation process of the NCCP – which has been a significant struggle for Pakistan, as it tends to be for most developing countries suffering from poverty and low levels of growth and institutional development. Summed up, Pakistan's climate change response strategy, at a national level, could be outlined as follows:

In recent years, the PTI government has introduced a series of new initiatives to tackle climate change under the Ministry of Climate Change, including but not limited to: reforestation, the Ten Billion Tree Tsunami Program, Clean Green Pakistan Index (which monitors the state of water, sanitation, hygiene, solid waste management, and plantation),

Citizen's Engagement Program, Drought Initiative, and the National Biodiversity Strategy and Action Plan. (Economic Survey) All these are commendable steps and will undoubtedly play a role in reducing carbon emissions, but there is still plenty to be done.



Source: Hussain et. al, 48

Way Forward

In a study by Ahmed et. al, it was shown that energy, transport, urban planning, industry, and agriculture – in that order – were the five most relevant sectors of the economy that needed to be rethought and restructured in order to assist global temperature rise under 2°C.

There is an urgent need for the energy sector of Pakistan to move away from thermal sources, which constituted 64% of energy production in 2018, to rapidly be replaced by renewables – including hydro, nuclear, and solar. Current trends are disappointing in this regard, with hydro sources actually dipping from 31% of production in 2017 to 27% in 2018 – and nuclear sources increasing at a snail's pace, from 5% in 2017 to 7% in 2019. (Ahmed et. al, 16) The energy and industrial sectors contribute approximately 51% of greenhouse gas emissions in Pakistan – a figure that is expected to rise to 64% by 2030. One critical area to focus on with regards to the industrial sector is its pollution of water – which leads to about 40% of disease related deaths. Land pollution from the industrial sector also needs to be tackled, whereby chemicals from production processes are dumped into soil – leading to erosion.

Similarly, the transportation sector's incentive structures need to be rethought in a manner that reduces road transit – which was responsible for 91% of passengers and 96% of freight in 2018. This in another crucial area, contributing 29% of CO₂ emissions through congestion, pollution, and urban sprawl. Cars, therefore, need to be disincentivized (through road/parking taxes) and replaced with high quality public transit in each of the provincial capitals and a reliable railway network.

Next, urban planning – which constitutes population/urbanization, water management, solid waste management, and an integrated mass-transit system for cities. There is a need to expand infrastructural capacity, especially in the areas of sewage, waste disposal, and public transport. Furthermore, the protection of natural wetlands and waterways is in order. A comprehensive, well defined strategy for each of these is crucial in mitigating climate change. Finally, agriculture – and in particular crop growing practices – are a significant hurdle.

These include the use of fertilizers, pesticides, fuel/oil, tractors and other equipment, cooling/heating facilities which require electricity, and shipping: all of which involve the release of "carbon dioxide, methane, nitrous oxides, and the GHG." (Ahmed et. al, 19) Secondly, the irrigation system – which is mired by inefficiencies – and widespread deforestation are also crucial bottlenecks to addressing climate related ills.

In order to tackle these issues, it is important to focus on the development of institutions – which are the tools through which large scale, sustainable interventions may be pursued. A multipronged, dynamic approach is required in this regard, whereby civil society organizations (such as NGOs) and the corporate sector ought to be incentivized to participate in the climate response alongside the government to raise funds, leverage context specific knowledge, build awareness, contribute to capacity building, engage grassroots communities in the process, and pursue innovative solutions. (Biagini and Miller, 243)

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Monthly Round Up India's Misplaced Apprehensions About CPEC

Saddam Hussein

New Delhi under Modi's Hindutva regime has presumably once again started attacks on Chinese workers and officials in Pakistan. A suicide attack targeted a motorcade carrying Chinese nationals at the Gwadar Eastbay

Expressway Project on 20 August 2021, which killed two Pakistani children and injured one Chinese worker. This comes only a month after nine Chinese nationals were killed when a bus carrying Chinese engineers and workers to the

site of the Dasu Dam was attacked. There is obviously only one reason for these attacks; to destabilize Pakistan and harm China Pakistan Economic Corridor (CPEC) venture.

The development comes after the Taliban were taking control of Afghan provinces one by one in recent weeks. Now that Taliban are in Kabul and Ghani exited the country, it appears that there is little room for India and its proxies to operate from Afghanistan. In a knee jerk reaction, Indian proxies started attacking Chinese workers and officials in Gwader. Let me explain why New Delhi is so obnoxious about CPEC.

India, since the very beginning, has decided to stay away from CPEC and is seeing it as an intimidation or encirclement of its geostrategic interests. Conventional wisdom has it that India is upset about CPEC at two ends. One is Gwadar, where the Chinese are establishing a maritime presence. The corridor will also strengthen security cooperation between Pakistan and China; the core of which will be consolidation of the naval cooperation between the two sides. This would contribute to the balance of power in the region, against the US courting India, assigning the lead role in the Indian Ocean, which is unacceptable to both China and Pakistan.

The other is Jammu and Kashmir, where merging of Pakistani and Chinese territorial and military frontiers will internationalize the Kashmir issue, which India certainly does not want. New Delhi is also bothered about China's mounting investment in Pakistan, largely pouring in nuclear energy to assist Pakistan's plans to build six nuclear reactors in coming few years, with more in the pipeline. India also seems to be annoyed as it has eyes on energy resources in Central Asia and Afghanistan to satisfy its energy needs since long, but China has eaten up many of these opportunities in recent years. Once completed, the CPEC venture would amplify China's strategic footprints in the Indian Ocean and would alter the regional power matrix forever. Beijing would then be a much more dominant in the Indian Ocean – even though geographically speaking China is not an Indian Ocean power – because CPEC offsets the Indian tactics for taking advantage of Chinese weakness in the Indian Ocean by blocking the Strait of Malacca in times of conflict.

It is a known fact that India, to this day, has been reluctant to accept the notion of a stable Pakistan and is always engaged in activities that would disrupt its peace and stability. Now with the current Modi government in New Delhi, the ideological Hindutva regime has become far more belligerent with the confessions of its sitting ministers about sponsoring state terrorism in Pakistan to ensure India's interests. This is why CPEC is a venture that India doesn't want to materialize, because it would transform Pakistan into an international hub for trade and connectivity and would place Pakistan at the center of international politics and diplomacy.

According to an IMF forecast, CPEC is predicted to boost Pakistan's economy manifolds. The forecast mentions that Pakistan's GDP will approach \$4.2 trillion by 2050 from the current \$988 billion. The 3,200 km-long CPEC corridor is planned to connect the world's second largest economy, China, with the Middle East and Central Asia, reducing the alternative sea route distance – via the Malacca Strait – by 10,000 km. The report estimated that the economic corridor would create some 700,000 direct jobs between 2015 and 2030, and add up to 2.5 percent to the country's growth rate.

It is pertinent to note that CPEC is a demonstration of the vow of the leadership of China and Pakistan to work together for the shared benefit of their people and peace, prosperity and socio-economic advancement of the region. India's opposition to the project is in fact the opposition to the brighter future of the region. Instead of nurturing needless and uncalled for opposition to this dynamic project, the Indian leadership ought to focus on upgrading the plight of their own people and disentangling them from generational traps of miserable poverty, hunger, disease and socio-economic backwardness.

New Delhi ought to realize that in our contemporary times, medieval politics would soon become redundant. The future belongs to economics and connectivity. India should not be agitated over Pak-China cooperation through the CPEC, rather stable Pakistan is in favour of India as it wants to achieve its high economic growth with the help of regional stability.



Monthly Round Up Unfolding of the Kabul's Future

Saddam Hussein

Taliban, after 20 years of struggle are once again back in Kabul. Two decades of war achieved nothing. More than two trillion dollars and thousands of lives for what? Only to replace Taliban with Taliban. Though, it is pertinent to note that the Taliban (the students) have grown exceedingly mature over time. The taking over of Kabul proved to be very smooth and without any bloodshed. Taliban are also giving assurances again and again that they will formulate an

inclusive government, will guarantee all rights to women within the ambit of Islam, will not let anyone use Afghan soil against anyone, will engage in constructive engagements with the world and with neighbors in particular, will not take revenge, and have also reached out to minorities, saying that will be given all fundamental rights and protection; they don't need to leave for the fear of persecution.

The overall situation and conduct of Afghan so far has been promising. However, the neighbors of Afghanistan, particularly Pakistan should stand alert in case the situation gets out of control. There is a power vacuum at present in Kabul, despite that the Taliban have become de-facto administrators of Kabul. Albeit, the world rarely recognizes de-facto set-up; now there should be a move towards a de-jure system of governance. For this there are few things that are of key significance.

Firstly, Taliban need international diplomacy. They have already been engaging with Moscow and Beijing in recent years. The engagements observed more depth during last few months. Both Kremlin and Beijing also expressed their desire to have constructive engagement with Afghanistan when Taliban would come to power. Perhaps China is preparing to recognize the new set-up under Taliban soon, when announced. Russia would wait a while, but not very long to recognize the new set-up.

On the other hand, Tehran which was a staunch adversary of Taliban, has now turned into an acquaintance if not a friend. Additionally, Pakistan which has historically not so good relations with Kabul, would presumably have good relations with the new set-up, as Islamabad was at the core of all the peace efforts. It was Islamabad, which leveraged its leverage over Taliban and convinced them to sit with American to push Afghan conflict towards a closure. So, diplomatically speaking Taliban are doing fairly good at this front.

Secondly, Taliban have shown sheer pragmatism in dealing with internal politics. They are negotiating with everyone and all ethnic groups, even their hard-line ideological adversaries – the Northern Alliance. This way Taliban swept across Afghanistan without any blood-shed. Taliban also gave assurance of security to the prominent Afghan leaders, irrespective of ethnic background and political or religious ideologies. These leaders include the likes of Hamid Karzai and Dr. Abdullah Abdullah. The only challenge remains on the external front, but that too is for a short term. Eventually, many from the West too would engage with Taliban, at least maintain a working relationship will become inevitable.

Thirdly, there is a challenge of running out of

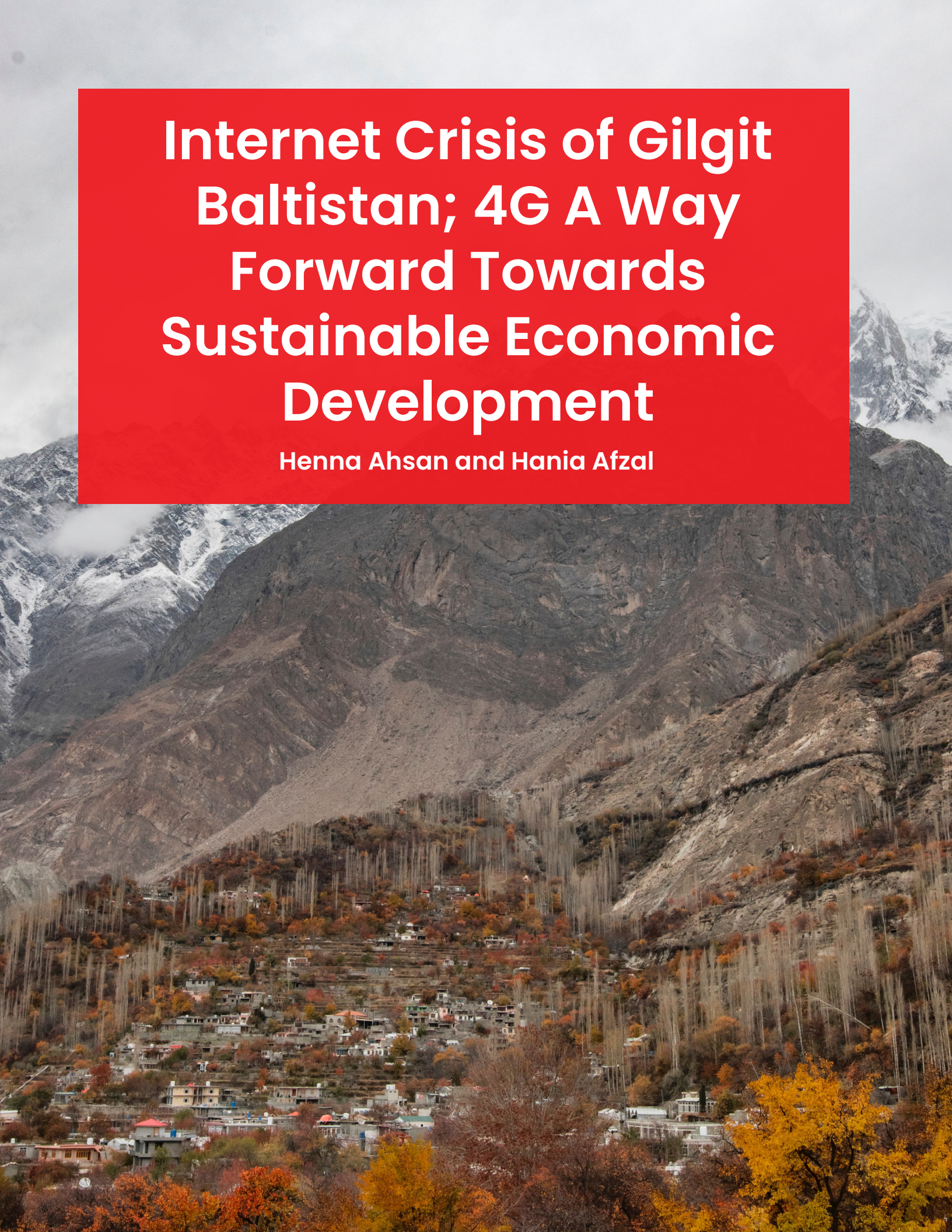
finances. The US has frozen nearly \$9.5 billion in assets belonging to the Afghan central bank and stopped shipments of cash to the nation as it tries to keep a Taliban-led set-up from accessing the money. US sanctions on the Taliban mean that they cannot access any funds. The International Monetary Fund (IMF) also suspended Afghanistan's access to IMF resources, including around \$440 million in new monetary reserves, due to a lack of clarity over the country's government after the Taliban seized control of Kabul. The IMF's announcement came amid pressure from the U.S. Treasury, which holds a controlling share in the Fund, to ensure that Afghanistan's share of a Special Drawing Rights reserves allocation do not fall into Taliban hands. The Fund has traditionally relied on its membership to decide whether to engage with governments that take power in coups or disputed elections.

For the purpose, some of the Muslim countries and regional powers like Russia and China can formulate a mutual fund for Afghanistan. This fund should cater to the financial needs of Afghanistan for at least 3-5 years. Until then, Afghanistan should be facilitated with Mega-projects and economic connectivity so that it can kick-start economic activity and generate revenue on its own. Trade would be at the driving seat of this proposed economic vehicle. Remember the cost of a mutual fund would be minuscule if we compare it with the cost of Kabul once again gone the wrong war. The whole region will become volatile. This would be particularly alarming for China who wants to expand and consolidate CPEC and BRI through peace in Afghanistan.

It goes without saying that Afghanistan's economic connectivity and infrastructure development must continue in the larger regional interest. Russia, China, Pakistan and other regional stakeholders must cooperate with Kabul to develop capacity key to economic connectivity and integration. Economic turmoil is a breeding ground for extremism and terrorism, and it is a collective responsibility to not let that happen again. We must not lose this opportunity of peace after decades. Kabul is calling, regional stakeholders must answer the call.

Internet Crisis of Gilgit Baltistan; 4G A Way Forward Towards Sustainable Economic Development

Henna Ahsan and Hania Afzal



A few days ago, Prime Minister of Pakistan, Imran Khan, inaugurated commencement of several telecom projects in Gilgit Baltistan (GB) worth millions of dollars. All these projects are to be implemented under the umbrella of Ministry of Information Technology and Telecom (MoITT) spearheaded by SCO (Special Communications Organization) which is an armed forces entity providing telecom services in AJ&K and GB for many decades. Among these very important projects one project named GPON aims to provide high speed internet connections to domestic and commercial users in GB. GPON which stands for Gigabit Passive Optical Network is a latest technology replacing conventional copper connections and truly withstands the definition of broadband. This technology makes use of optical fiber to deliver internet speeds of 8MB, 12MB, and 25MB and even more which is far higher than speeds which were being provided by conventional copper cable networks. Currently this technology is being deployed only in major cities of Pakistan like RWP-ISB, Lahore and Karachi by existing broadband players like PTCL, Nayatel and Transworld. Along with providing high speed internet this technology will also provide an IP phone to every premises and an IP TV connection as well.

It is very refreshing news that people of Gilgit Baltistan are also going to have this latest broadband technology soon. However the serious question which needs to be answered is whether the poor people of GB will be able to take benefit of this important investment and the simple Yes or No answer to this is very difficult as it depends on some important leadership decisions. If we look at different packages and rates charged by above service providers, we see that average monthly rate of 8MB connection is Rs 2572- and first-time installation charges range around Rs. 3700 which include the deployment of a Wi-Fi router, a smart TV box and may be a new phone set as well.

When COVID-19 hit Pakistan and online education system was adopted, students faced severe issues of internet speed and connectivity. The students of GB blocked the Karakorum highway in protest to register their complaint against ICT facility as most of GB didn't had the internet facility. Student demanded that private sector should be provided with the opportunity to provide at least the 4G services so that students might be able to save their future

Amjad Hussain, a student of QAU mentioned in his interview that majority of students who had come back to GB because of hostel and university closure doesn't have any access to internet and therefore unable to attend their classes.

Sabir Hussain, another faculty member at GC University Faisalabad mentioned that he had to displace upon closure of university for delivering the online lectures to the students.

Another faculty member who doesn't want to show his identity informed that there are more than hundreds of students who demands to halt the online education system due to poor or non-availability of internet.

A student Afridi and his friends tried to resolve the issue of internet on their own for which they do trekking of almost two hours daily to reach a small mountain top for taking their online classes by risking their lives.

Service Provider	Internet Package	Monthly Charges	First time Installcation Charges
PTCL	15MB	Rs 2819	Rs 5000
Nayatel	15MB	Rs 2399	Rs 11000
Transworld	20MB*	Rs 2500	Rs 5000

Source: Service provider's websites.

So, looking at the above details it seems that paying that much amount or even some more (as the above charges does not include Smart TV and phone bill charges) may be a real challenge for the poor people of Gilgit Baltistan. As SCO is not purely a private Ltd company intended to make profits so some new, out of the box initiatives need to be taken to make people take real benefit of this extremely useful technology. As a first step SCO needs to provide connections to all the people coming in access of this technology free of cost for certain months so people could feel the usefulness of this service. Secondly monthly charges needs to be reduced to minimum at least for low data rate connections, let's say for 8MB or 10MB and higher amounts may be charged for people demanding high levels of data speeds and from commercial users. Moreover first time installation charges, which include deployment of some costly equipment, may not be completely waved off but these may be recovered from customers in maximum possible installments.

Already students of Gilgit Baltistan has suffered a lot against their education due to educational institutes closure on account of COVID 19 restrictions and who knows how long this affliction may prolong. So this high speed internet facility would prove to be a great relief for the students. Also it will take tourism in these beautiful areas to a new level with high dividends. Further providing high speed internet in these areas for all will create new job opportunities like e commerce and work from home job opportunities for both males and females. In this new era of Globalization internet has become a necessity so it should be provided at low costs or on installments plan so as to provide coverage to the marginalized segments of GB. Providing the "Internet for All" will help generate economic opportunities as well as education facility to the people of GB and will ultimately contribute towards the sustainable economic development.



CONTACT US

Pakistan Institute of Development Economics (PIDE)
P.O. Box. 1091, Islamabad, 44000, Pakistan.

Tel: +92-51-9248051
Fax: +92-51-9248065