



REPORT

International public broadcasting: a missed opportunity for projecting Australia's soft power

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EXECUTIVE SUMMARY

The Australian government has been silent on the role of international public broadcasting in supporting Australia's brand and reputation overseas ... This has impaired the projection of Australia's soft power and ignores the ABC's long and distinguished history of broadcasting into a region which the government now identifies as a principle geo-strategic priority.

Since the first Lowy Institute report on International Broadcasting in 2010, several global and regional powers have made major strategic investments to boost their international public broadcasters.

During the same period, both the Australian government and the ABC have lost sight of the potential soft power role of international public broadcasting. Australia is explicitly competing for global and regional influence, yet Australia's international broadcasting has been weakened through a combination of government inconsistency and neglect, ideology-driven decisions, budget cuts and apparent ABC management indifference. The Australian government has been silent on the role of international public broadcasting in supporting Australia's brand and reputation overseas, particularly in the Pacific. This has impaired the projection of Australia's soft power and ignores the ABC's long and distinguished history of broadcasting into a region which the government now identifies as a principle geo-strategic priority.

A fresh start for Australia's international broadcasting is possible but requires a clear focus on strategic aims and the geographic and demographic characteristics of the intended audience. Stronger commitment and medium-term funding are essential, and overall responsibility for international broadcasting should be placed with DFAT. In renewing its commitment to international public broadcasting, government should also draw on a broader range of expertise, such as that of SBS, other Australian media, practitioners in the target communities and their diasporas.

INTRODUCTION

Just under a decade ago, a Lowy Institute working paper, *International Broadcasting and its Contribution to Public Diplomacy*, concluded that one of the most efficient and effective soft power tools for government was international public broadcasting. Yet in the years that followed, Australia's international public broadcasting has been diminished through a combination of government inconsistency and neglect, ideology-driven decisions, budget cuts and apparent ABC management indifference.

The fall from soft power relevance is so marked that in recent public policy documents describing Australia's public diplomacy and soft power efforts, the Australian Government has been silent on the role of Australia's international public broadcaster in supporting Australia's brand and reputation overseas.

That is a serious and significant gap. It means that at a government level, Australia's international broadcasting services are no longer recognised as a valuable contributor to our soft power, and ignores the ABC's long and distinguished history of broadcasting into a region which the Australia Government identifies as a principal geo-strategic priority.

The question is therefore whether international broadcasting still has a role to play in Australia's soft power efforts.

This paper attempts to answer that question, reviewing the evolving role of Australia's international broadcasting and examining the lessons for Australia in the way international broadcasting has developed globally.

International public broadcasting is still a central tool of public diplomacy for a number of globally influential countries, and several have increased funding and broadened the services of their broadcasters. Yet, over the past decade, the Australian Government and the ABC have each withdrawn significant resources from Australia's international broadcasting in an unfocused, piecemeal and unstrategic manner, leaving Australia's international media reputation much diminished, particularly across the Pacific.

On balance, we conclude that public international broadcasting still has an important place among Australia's principal soft power tools but the focus of the debate needs to shift from issues such as short wave and restoring Radio Australia, to a fresh approach. This approach should take account of the lessons from other international broadcasters, Australia's own national interest priorities and the needs of target audiences, notably in the media-deficient Pacific. To succeed, such a fresh approach would require a significant commitment in the medium to long term from government.

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INTERNATIONAL PUBLIC BROADCASTING IN THE 21ST CENTURY

The first two decades of the century have seen huge changes for the public broadcasting organisations that operate internationally, but also a remarkable level of continuity. Many of the prominent players such as the BBC World Service, NHK, France's TV and radio broadcasters, and the suite of USA public international broadcasters, still do in 2019 more or less what they did in 2000 albeit using some different technology and delivering some of their products in different ways. A few smaller players have stumbled, usually as a result of drastic cuts in government financial support. But some new (or revamped) players have emerged.

As in the early years of this century, transformations in the international environment for broadcasters are likely to continue. The forces driving these transformations can broadly be categorised into three interwoven strands: geostrategic factors, the competitive environment and technology. All of these will affect the role and potential of international broadcasting in projecting Australia's soft power.

GEOSTRATEGIC FACTORS

China's rise and the United States' response to it have shaken the global status quo, particularly in Asia. The US-China trade war has unsettled global economies. The US has redefined its focus away from counter-insurgency and onto its strategic competitors, particularly China and Russia.¹ For its part, China is energetically attempting to influence countries across the Indo-Pacific region to support and advance its own ambitions. In the northern hemisphere, Russian foreign policy has grown increasingly assertive and its state-sponsored grey zone operations of misinformation and disinformation have unsettled Western democracies. Meanwhile, the integrity of the European Union is under challenge both from external forces such as immigration, and from within with Britain's planned exit.

At the same time, Australia's traditional view of itself as having a "sphere of influence" in South-East Asia and the small island states of the Pacific is no longer uncontested. Not only is China a regional power, but other countries including India and to a lesser extent, Indonesia, add to an increasingly complex and powerful network of relationships in the Indo-Pacific region.

Public diplomacy — the means by which governments project their strengths and attractions to the world and attempt to shape other nations' policies in their favour — needs to adapt to these changed circumstances. Public international broadcasting is an important element of a nation's

public diplomacy, and in this changing environment, it is unsurprising that international public broadcasters have been tested. Yet they have endured, and in some cases, even flourished.

COMPETITIVE ENVIRONMENT

International public broadcasting came of age in the Cold War era. The “mission” mattered; audiences in the Soviet countries which were the target of Western public broadcasting were denied access to independent sources of news by their governing regimes. The task was to pierce the information barrier, enlighten audiences, fill the information deficit and inspire them to evaluate their regimes objectively and perhaps eventually overthrow them. On the Soviet side, state-funded propaganda was aimed back at Western audiences. In the context of Cold War imperatives, the supply of funding on all sides was generous. Relations between like-minded international broadcasters were more about friendly rivalry than tough competition for audiences.

After the fall of the Berlin Wall in 1989, broadcasters from the West suddenly had to compete with a plethora of local outlets. At the same time, technological changes provided privately-owned broadcasters with a potentially profitable market. In 1990, the international channel CNN had started in 1985 expanded its target audience from travelling US citizens, and began to compete for audiences around the globe.

In the same year as CNN's global push, Joseph Nye coined the term “soft power”.² Despite the post-Cold War ‘peace dividend’, international public broadcasters (IPBs) justified their continued government funding on the grounds that they were uniquely placed to strengthen their nations’ international standing by projecting core values.

As the 90s progressed, IPBs found themselves competing with domestic broadcasters in developed and partially developed nations for both audiences and spectrum. With the rapid multiplication of available media choices, IPBs needed to provide something distinctive. For many, their point of uniqueness was the credibility derived from their editorial independence, as well as the depth and breadth which they brought to their coverage of international affairs. This was an expensive offering involving costly networks of foreign correspondents.

Fragmentation of audiences accelerated with the increasing ability of media consumers to deal with the over-abundance of choice by filtering what they accessed: a paradoxical process that has resulted in many people narrowing their range of information sources.

This, together with other pressures including the effects of the global financial crisis, saw government spending on international broadcasting contract, resulting in upheavals among IPBs over the past decade. A striking feature of the landscape that remains is more differentiation, and less direct competition, between IPBs.

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Even geographically there is little overlap in the target areas. For example, Russia Today (RT) focuses on European Union audiences; for others such as the BBCWS, these markets are already saturated. Some, such as Al Jazeera and New Zealand's IPBs, continue to pursue the aim of providing credible information to the information poor, as a way to bring credit to their funding states. Other models have also emerged. RT, for example, is less focused on editorial standards and more interested in disrupting received wisdom in its target countries. For such a broadcaster, raw audience figures are not a relevant measure of success.

Adding to these complex dynamics, a new type of international broadcaster is emerging as a competitor to the traditional IPBs. The media activities of non-state actors such as ISIS look remarkably like those of state-funded public broadcasters and have broadly similar aims. A number of traditional IPBs (such as the BBCWS) have increased output in relevant languages and regions in response. In this setting, new entrants (or scaled up re-entrants) whether local or international, public, private, or non-state will succeed only with a clear understanding of the competitive environment, and a robust and creative plan of how they can be distinctive in that arena.

TECHNOLOGICAL DISRUPTION

The revolution in information and communication technologies has caused disruptions which have been as significant for international broadcasting as for other parts of the media and communications industry. At the turn of the millennium, the standard range of platforms for IPBs included both traditional and new media: radio (shortwave and FM), TV (terrestrial, satellite and cable) and internet (although infrequently in multiple languages and not always continuously updated). This landscape altered dramatically in the middle of the first decade, with a game-changing bout of innovation both in the devices available and the information platforms. The advent of Facebook, the rise and fall of MySpace, the success of YouTube, Google, Twitter, Tumblr and Instagram, all in the first decade, completely transformed the type and range of information platforms accessible to consumers worldwide. In China, there was a roll-out of a similar range of social media channels.

After the breakneck pace of innovation of the first decade, the second has been more a story of consolidation in both hardware and software. Investors now focus more on wearable technology, the "internet of things" and 5G networks than on new forms of media. In the third decade, major technological challenges for international public broadcasters might include providing relevant services to a fridge in Kansas, through the Great Firewall to a smart phone in Kunming, to mass audiences in Karachi, through slow NBN connections to Katoomba, and to an old radio in Kiunga.

The corollaries of innovation in media and communications technology have been convergence, consolidation, and integration (both vertical and horizontal) — a blurring of old boundaries across industries. Broadcasters have adopted online distribution models; hardware and software providers such as Apple and Microsoft have moved into audio and video channels. New media organisations (such as Facebook, YouTube, Google), streaming services (e.g. Netflix, Stan) and online retailers (e.g. Amazon) have become content providers and de facto broadcasters.³

Grappling with this digitally-driven convergence of broadcast and broadband media and the constant flow of innovation, broadcasters have been forced to make major changes in both their operations and strategies in their attempts to continue to reach both traditional and new audiences. Unsurprisingly, international broadcasters have adopted a range of different approaches to meet the challenges, with varying success. Some have flourished; others have withered. Among the latter are Australia's international public broadcasting services, which have declined sharply in the past decade.

THE AUSTRALIAN EXPERIENCE SINCE 2010

The decade since the Lowy Institute's last survey of international broadcasters in 2010 has been politically unsettled and marked by a revolving door of prime ministers, but Australia's economic fundamentals have remained robust. The Australian dollar has risen from the sixth to the fifth most traded currency globally.⁴ Australia is still the world's 13th largest economy and is projected to move back to 12th over the next decade;⁵ it has the world's 11th highest GDP per capita.⁶ On these foundations, Australia's ability to support a successful international broadcaster is comparable with like-minded peers such as the UK, US, France, Japan and Germany.

Geopolitically, Australia's focus has shifted to the Indo-Pacific. Australia's 2017 Foreign Policy White Paper identifies "five objectives of fundamental importance to Australia's security and prosperity":

- Promotion of an "open, inclusive and prosperous Indo-Pacific region";
- Delivering more opportunities for Australian businesses;
- Ensuring Australians remain safe;
- Promoting and protecting the international rules that support stability and prosperity; and
- Stepping up support for "a more resilient Pacific and Timor-Leste."⁷

Whether intentional or not, this omission from Australia's first foreign policy white paper in more than a decade reflects the much-diminished profile of Australia's international broadcaster since 2010.

The White Paper also acknowledges the importance of harnessing Australia's soft power and recognises the strength and diversity of Australia's connections to the world. Yet nowhere in the White Paper, including in the chapter dedicated to "Partnerships and Soft Power", is there any reference to the soft power role played by ABC's international broadcasting. Whether intentional or not, this omission from Australia's first foreign policy white paper in more than a decade reflects the much-diminished profile of Australia's international broadcaster since 2010.

A CHEQUERED PAST

Australian international broadcasting has been a fixture in Australia's international profile since 1939, underpinned by the ABC's charter under existing legislation that requires the ABC to transmit programs to countries outside Australia in order to:

- Encourage awareness of Australia and an international understanding of Australian attitudes on world affairs; and

- Enable Australian citizens living or travelling outside Australia to obtain information about Australian affairs and Australian attitudes on world affairs.⁸

In 2010, the broadcaster had enjoyed close to a decade of stability and consolidation, after a chequered history in terms of both strategic direction and unpredictable funding⁹. Funding for its radio broadcasting arm Radio Australia came from the Department of Communications allocation for the ABC, while the Australia Network (the television broadcasting arm run by the ABC) was funded by the Department of Foreign Affairs and Trade through a periodic tender process.

By 2011, the future of the Australia Network seemed assured. The government awarded the ABC a 10-year, \$23 million contract to run the network, abandoning a highly-politicised year-long tender process.¹⁰

Expecting that the contract would be honoured, the ABC merged key functions of Australia Network and Radio Australia. However, in its first Budget in 2014, the new Abbott Government announced the cancellation of the contract. This led to a loss of 80 staff from the ABC's International Division, a reconfiguration and rebranding of ABC's international media services to create the Australia Plus service, and a reduced number of broadcast languages.¹¹

The redundancies and budget cuts also had a major impact on Radio Australia services. This was decried by some observers as a gutting of the service and as a fundamental misunderstanding of the importance of the service into the Pacific.¹²

Perhaps the most damaging blow for Radio Australia came in 2017 when ABC management decided to cut shortwave services to the Pacific.¹³ By December 2016, the Khmer, Burmese, Vietnamese, and French language services had already been discontinued, alongside a promise to increase the focus on Chinese, Indonesian and PNG audiences. The following year, the remnants of the ABC's international services were distributed throughout the organisation.¹⁴

Then in July 2018, yet more re-branding of the international services took place. The international television digital service, Australia Plus, was renamed ABC Australia, while Radio Australia, which had been successful in maintaining its widely recognised call sign for close to 80 years, was to be known as ABC Radio Australia.¹⁵

The demise of Australia's international broadcasting was almost complete, driven by domestic political agendas on both sides of Federal Parliament, combined with the financial priorities of the government and the ABC itself, leaving Radio Australia and its sibling with small change.

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THE ABC'S CURRENT POSITION

Of the total revenue provided by government — \$865.5m in 2017-2018 — the ABC devotes around \$11m a year to its international services¹⁶ focusing on a set of target audience groups:

- Educated and mobile influencers in the key Asian markets of PRC (and the Chinese diaspora), Indonesia and India;
- PNG and wider audiences in the Pacific; and
- Australians living and/or travelling abroad; and
- Culturally and linguistically diverse communities within Australia, particularly those with connections to target markets in the Asia-Pacific region.

Reaching these target groups is achieved through a mix of distribution approaches. In the case of PNG and the Pacific, as radio remains important, programs are broadcast 24 hours a day through audio and digital service via FM broadcasting and streamed to online and mobile platforms. In the case of television, a 24-hour schedule of news, current affairs, sport, education and children's content is delivered to the Pacific via satellite and elsewhere in Asia by 120 re-broadcast partners.¹⁷

Although there is limited audience measurement data available, the ABC's latest annual report cites Ipsos survey data which points to 406,000 "affluent" views of ABC Australia Television each month in 2018 across nine markets.¹⁸ This is in contrast to its predecessor, the Australia Network, which had a reported reach of 31 million homes in 2013.¹⁹ Although there is no direct correlation between audience and reach, this comparison would suggest a notable fall in usage.

Radio Australia currently offers only 13 FM relay frequencies across 7 countries, compared with 21 before the ABC's budget cuts, restructuring and shortwave decommissioning over 2014-2017.²⁰ At present, the rebranded ABC Radio Australia broadcasts in English via FM transmission to Fiji, PNG, Samoa, Solomon Islands, Tonga, Vanuatu and East Timor, and in Pidgin to PNG, Solomons and Vanuatu.²¹ Transparency International notes that the ABC services no longer reach significant parts of the PNG Highlands and Islands, Bougainville, Solomon Islands and Vanuatu, and that ten Pacific Island Forum countries no longer receive any radio service from the ABC.²²

In 2010, Radio Australia's website received an average of 764,000 monthly views;²³ recent data for ABC Radio Australia's web traffic is

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unavailable but the 2016-17 ABC annual report stated that Radio Australia's Facebook page had 187,885 followers in mid-2017 having shifted to a reliance on social media channels to reach audiences.²⁴ On the basis of the available data, Radio Australia's audience therefore appears to have shrunk dramatically.

With a funding envelope for international broadcasting which is close to a quarter of the size of its budget a decade ago and one of the smallest in a global comparison (see Table 1), the ABC's ability to effectively meet its target audiences' expectations and demands with relevant, timely and credible programming is challenged. As scant funding is available for country and language specific programming, the ABC has little option but to opt for rebroadcasting content made for Australian audiences. This is arguably, in the absence of any reliable survey data, of little interest or relevance at least to two of the targeted audiences — influencers in Asia and the peoples of PNG and the Pacific.

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A NEGLECTED PUBLIC DIPLOMACY TOOL

In direct contrast with the much-diminished state of Australia's international broadcaster, the survey conducted for this report has found that a number of other IPBs globally have increased their funding, service and profiles.²⁵ The governments of each of those countries continue to regard international broadcasting as an important element of their overall soft power and public diplomacy strategy. Such a strategy usually includes a comprehensive range of activities, including cultural (e.g. British Council, Confucius Centres) and educational diplomacy (scholarships and study tours) as well as international broadcasting.

Australia's soft power approach does include some of these activities. The 2017 Foreign Policy White Paper cites education, the New Colombo Plan and sports diplomacy as important soft power tools. But unlike the previous White Paper released in 2003, there is no mention of international broadcasting.²⁶

That is a significant omission, and shows that the Australian government no longer recognises international broadcasting as a potent soft power tool. It also overlooks the credibility and loyal audiences the ABC built during its long and distinguished history of broadcasting in a region which is a geostrategic priority for Australia.

It is unclear why international broadcasting is missing from the White Paper, but there are several possible reasons. At the time of its drafting, it is conceivable that the ABC's then senior management did not comprehend the international public good and soft power role of their broadcasting asset, nor the policy and funding ramifications of the White Paper.

The ABC's own corporate planning documents are revealing. The 2017-18 Corporate Plan covered international broadcasting and talked of reviewing its international services within a restricted funding envelope.²⁷ That plan heralded the dissolution of the ABC's international division, its staff cut back and functions absorbed into the wider corporation. The 2018-2019 Corporate Plan (which sets priorities for the next four years) is silent on its international broadcasting responsibilities aside from a brief mention in a list summarising the overall purpose of the ABC.²⁸

The absence until recently of public debate or discussion about why Australia has an international public broadcaster has not helped.

Ironically, the ABC's decision to cancel domestic shortwave services to remote parts of Australia as well as international services to nearby countries catalysed a renewed debate. In response to that cancellation, Senator Nick Xenophon introduced a bill in early 2017 seeking restoration of shortwave broadcasting. Later that year, the Committee inquiring into the bill recommended against it proceeding (Shortwave Inquiry).²⁹ The government in September 2017 then commissioned a review of Asia Pacific Broadcasting Services (Broadcasting Review), conducted jointly by the Department of Communications and Arts and the Department of Foreign Affairs and Trade (DFAT). The next year, in line with the Foreign Policy White Paper recommendations, DFAT initiated a review into Australia's soft power strengths and capabilities (Soft Power Review).

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Debate has also been fuelled by China's expanding broadcasting services into Pacific countries, which had previously been regarded as Australia's broadcasting domain. The disappearance of Radio Australia's language broadcasts across much of the region (except Tok Pisin), combined with the retirement of shortwave broadcasting, has created a void which China stands poised to fill. This comes at a time when Australia has embarked on its Pacific 'step-up', investing more in diplomacy and development across the small island states.

Whether China's increased broadcasting presence in the Pacific is effective remains unclear. However, the threat of the Chinese airwave takeover in regions that Australia identified as priorities in the 2017 White Paper brought a degree of urgency to the debate.

This is exemplified by Prime Minister Morrison's announcement during his first official tour of the Pacific in January 2019 that Australia would provide \$17.1m over three years to Australia's FreeTV association to broadcast 1000 hours of Australian television into the Pacific.³⁰ Already mooted but without detail by the Prime Minister in November the previous year, Morrison's announcement made no reference to the ABC's history of broadcasting to the Pacific nor its existing legislated responsibility to provide international services. The announcement also pre-empted the outcomes of both the Broadcasting Review (which was quietly released on 17 October 2019)³¹ and the Soft Power review, yet to be published.

Twelve months after flagging this initiative, FreeTV had not initiated discussions with counterpart Pacific broadcasters much less broadcast any programs.³² However, the Prime Minister remained convinced that this was the better pathway for projecting Australia into the Pacific. In a door-stop interview about the ABC's role as a soft power tool,³³ Morrison made very clear his view that the ABC should focus on its domestic broadcasting role, while a diverse range of broadcasters should participate in the international public diplomacy role:

"A big part of the Pacific Step Up was being able to access a great amount of Australian content — largely entertainment content and other kinds of cultural content which is part of the social diplomacy effort. And we're working with a whole range of different broadcasters and content providers on those issues.right now, I'm keen for the ABC to remain very focused on the communities in Australia."³⁴

It is not surprising therefore that the Broadcasting Review, released just days before the prime minister made these comments, includes a recommendation to "build on the government's recent decision to work with Australian commercial media operators to ensure that audiences in the Pacific have access to more quality Australian content on television and other platforms."³⁵

However, the review's report did more than give policy credence to what appeared to be a 'captain's pick' a year earlier.

The report recognised the value of clarifying the objectives of Australia's Asia Pacific broadcasts and ensuring that Australia's Asia Pacific broadcasters were "provided with the autonomy they need to determine the most effective and efficient broadcasting platforms ... and language and content ...".³⁶

These findings echo a core principle of international public broadcasting for achieving effectiveness as a soft power tool. While questions about technical broadcasting techniques and platforms — such as shortwave and FM — are important and need to be resolved, it is more important for Australia to decide firstly where and how Australia's principal efforts in public diplomacy should be directed, and secondly, how its international broadcasting should be used as part of those efforts.

The Foreign Policy White Paper is the principal guide on these questions, despite its silence on the role of international broadcasting in Australia's public diplomacy. One of the principal objectives of the white paper was to "step up support for a more resilient Pacific and Timor-Leste". It is therefore in the Pacific and Australia's immediate neighbourhood that the thrust of our public diplomacy should be directed, using the most potent vehicles at Australia's disposal. Principal among these is Australia's public international broadcasting.

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In an environment which is underserved by mainstream media, there is a clear case for Australia to provide reliable news and other broadcasting services, and equally clear risks associated with leaving the provision of these services to other countries whose interests may not meld at all times with Australia's.

The Pacific presents a textbook scenario for demonstrating the soft power value of public international broadcasting. In an environment which is underserved by mainstream media, there is a clear case for Australia to provide reliable news and other broadcasting services, and equally clear risks associated with leaving the provision of these services to other countries whose interests may not meld at all times with Australia's. It is a region of geo-strategic priority, with dispersed populations and a non-urban majority having limited to no access to FM, TV and internet platforms; its urban-dwelling, governing elite have access to a range of domestic and international media and are influenced by various interests, some of which are contrary to Australia's; and finally, Australia's public international broadcasting to the region has already built a significant legacy there thanks to credible and well-informed news services provided by the ABC, particularly through the Radio Australia service over many decades.

As for what Pacific countries want from Australia's broadcaster, detailed feedback is limited, variable and often anecdotal. Historically, there has been strong regional support for Radio Australia. In 1997, PNG's Prime Minister, Sir Julius Chan, proposed sacrificing \$1m in Australian aid to PNG in a bid to keep the RA service open after the Mansfield Review recommended its axing.³⁷ Ironically, RA's demise was averted when, wary of the impact this might have on Australia's relations with the region, then Foreign Minister Alexander Downer declared that the recommended closure "failed to take proper account of the genuine foreign and trade policy implications of such a move".³⁸

More recently, submissions to the Broadcasting Review made the case for reinvigorating Radio Australia and reintroducing SW broadcasting. Director General of the Pacific Islands Forum Dame Meg Taylor described the ABC as a "stalwart" for providing impartial analysis of the forces at play in an increasingly crowded and complex region.³⁹ Vanuatu's Prime Minister Charlot Salwai Tabimasmamas argued that Radio Australia had "brought reliable information about the Asia-Pacific region and the rest of the world to ... Vanuatu. Our people valued accurate and up-to-date stories on many topics ... we appreciated that reports were presented in English, French and ... our lingua franca of Bislama". Prime minister Tabimasmamas explained that for Vanuatu, "shortwave is not outdated technology."⁴⁰

The Broadcasting Review reflected the variety of submissions it received on the issue of short wave and was equivocal about the benefits of reinstating it, citing a lack of evidence and stating that a further evaluation would be required to justify such a move.

What is clear however is the strategic need and vocalised demand for Australia's international broadcaster to reinvigorate its services to the Pacific. The technology and choices of platform to reach this priority

audience are subsequent questions to be answered, after taking into account the target audiences' accessibility and their purchasing ability.

UPDATED SURVEY OF INTERNATIONAL BROADCASTERS IN 2019

While Australia has lost its way over the past decade, several other countries have reinvigorated their international broadcasting.

While Australia has lost its way over the past decade, several other countries have reinvigorated their international broadcasting. The Appendix provides an update on international broadcasting by the ten countries surveyed for the 2010 Lowy report and adds New Zealand, Russia and India.

To summarise the results of that survey briefly: two out of the thirteen (Netherlands and Canada) have withdrawn from broadcasting as other national priorities took precedence over international broadcasting services; Al Jazeera has been a target in Qatar's regional political divisions but has survived; in contrast, five countries (China, Japan, Russia, UK and USA) have made major investments and/or restructured their international broadcasters to generate new impetus; in France, South Korea and New Zealand, business has continued more or less as usual.

As the survey findings demonstrate, the health of an IPB correlates directly with its respective government's belief in the potency of broadcasting to support national strategic objectives. And in some parts, there has also been a return to the rhetoric and counter measures reminiscent of the Cold War era as China's rise unsettles the status quo.

A clear example of this is China's reference to the Uighur-language service of the US government-funded Radio Free Asia as an "enemy radio station". China tries to jam its broadcasts and puts pressure on the families of journalists working for RFA. Yet the service continues to report on China's mass detention of Uighurs, has maintained a significant audience in the target area and demonstrates the benefits of having services that gather and broadcast news in target area languages.⁴¹ The goodwill the US is gaining among Uighurs and in the international community from providing this service is incalculable, and comes at a cost of just \$2 million a year.⁴²

Estimates of governments' expenditures on international broadcasting more broadly are difficult to obtain. Even in Western nations with reasonably transparent budgets, comparable figures can be hard to identify: for example, it is often unclear whether published figures include distribution costs, commercial revenue etc. But as Table 1 below shows, there is a cluster of countries whose average annual spend is approximately AUD5 per head of population or more.

TABLE 1: Comparison of funding for international public broadcasters*.

Broadcaster	Current annual funding (most recent data available)	Annual funding as at 2010 (as listed in Lowy Institute 2010 Report, USD)	Expenditure per capita per annum (AUD)***	Media	Principal funding source	Languages
Voice of China (China Media Group)	USD6b-USD11b over unknown period (AUD9b-16b)	USD6b	n/a	TV Radio Online	PRC	61 languages
BBC World Service	GBP254m* (AUD472m)	USD415m/ £265m**	7.05	TV Radio Online	UK Government – licence fees and FCO	More than 40 languages
Deutsche Welle	€358m (AUD581m)	USD329m/ €236m**	7.05	TV Radio online	German Government	30 languages
France Médias Monde	€256m (AUD415m)	USD420m/ €302m**	6.34	TV Radio Online	French Government	TV: English, French, Spanish & Arabic; Radio: 14 languages
NHK World	USD400m (AUD581m)	USD215m	4.58	TV Radio Online	Japanese Government licence fees	TV: English Radio: 17 languages
Russia Today	USD300m (AUD435m)	Not included	3.02	TV Online	Russian Government, advertising	TV: Russian, Arabic, Spanish, English
US Agency for Global Media	USD661m (AUD960m) for FY2019	USD717m	2.44	TV Radio Online	USA Government	58 languages
ABC Australia, ABC Radio Australia	AUD11m	USD34m/ AUD43.5m**	0.44	TV Radio Online	Aust Government	TV: English Radio: English, Tok Pisin
RadioNZ Pacific	NZD1.9m (AUD1.75m)	Not included	0.37	Radio Online	NZ Government	Primarily English but some Pacific languages for breakfast programmes.

*Not included in the table: recent budget data was not available for Al Jazeera or Korea's KBS; funding data for India's Doordarshan is a total for both domestic and international broadcasting; the Netherland's RNW and Canada's CRI are now online only.

**OECD 2009 Exchange Rate <https://data.oecd.org/conversion/exchange-rates.htm>

***Population figures are from United Nations 2019 estimates but the funding figures have no consistency in what they do and don't include; for example NZ excludes delivery costs. Excluding Australia, New Zealand and China, the average is AUD5. If Australia were to match this it would be spending AUD125m on international broadcasting.

AUSTRALIA'S ACTIONS AND POLICY IN THE CHANGING INTERNATIONAL BROADCASTING ENVIRONMENT

The survey of international broadcasting over the past decade has clear lessons for Australia. The fates of the Canadian and Dutch services demonstrate that international public broadcasting requires substantial commitment from government; without it, broadcasters wither and should be dismantled. This frees government to focus on new priorities rather than funding low-priority legacy activities insufficiently with no chance of impact.

Some of the IPBs surveyed make a conscious effort to target diasporas of their citizens overseas; few make effective use of their domestic audiences with migrants from target countries. Australia, with its duopoly of government-funded broadcasters, seems to be alone in maintaining a rigid organisational divide between production for domestic immigrant communities through SBS and for speakers of the same language overseas through ABC Australia and ABC Radio Australia.

The most useful lessons naturally come from successful broadcasters: BBCWS, the stables of US and French broadcasters, Japan's NHK World and even the small but reliable Radio New Zealand Pacific. The obvious lesson is that government and the IPB need to agree on the value of international broadcasting in conducting the nation's public diplomacy, and to clarify their strategies in maximising its achievements. For example, every year the US State Department publishes a report on the major public diplomacy and international broadcasting activities conducted by the department and agencies such as USAGM over the preceding 12 months. It is a comprehensive report, underscoring the importance the United States attaches to public diplomacy and broadcasting as major soft power tools as well as being a reference on the US' strategies for advancing its foreign policy.

Australia has no such comprehensive review process. The issue is almost completely absent from government strategies or departmental annual reports. The last reference to international broadcasting in DFAT's Annual Report was in 2014/15, noting the government's cancellation of the Australia Network contract and the channel's subsequent demise. The 2017/18 report of the Department of Communications and the Arts, which funds the ABC, made no specific reference to the ABC's international broadcasting despite its place in the ABC's charter.⁴³

The obvious lesson is that government and the IPB need to agree on the value of international broadcasting in conducting the nation's public diplomacy, and to clarify their strategies in maximising its achievements.

This failure on the part of government to “own” Australia’s IPB activity is in stark contrast to the steadfast and long-term commitments of other countries with successful broadcasters including USA, Japan, Germany, France, the UK and China. Such commitment, allied with clarity about the strategic direction of the IPB, including geographical and social targets, arms broadcasters with the mandate necessary to acquit their missions in the national interest.

One element in the continued strength of several IPBs as soft power instruments is an explicit focus on identifying their audiences. In Australia’s case, the strategic priority identified in the 2017 White Paper is the Indo-Pacific. Within this, there are specific regions — East and Southeast Asia, and the Pacific — where an Australian international broadcaster can support Australia’s interests while maintaining the independence and credibility which are its core assets as a public diplomacy tool. An illustration of the importance of those assets is the ABC’s now defunct online portal initiative in China which was attacked for conceding too much to a foreign country in return for access to the Chinese online market.⁴⁴ After weathering criticism for four years, it was quietly shut down in 2018.⁴⁵

Even more important than geographical focus is clarity on demographic priorities; wanting to be liked by everyone risks ignoring those who matter most in terms of Australia’s strategic aims, which might be geopolitical (thus needing to target opinion-formers), trade-related (the business community), or aid program priorities (such as women and young people).

Once the demographics are clarified, attention should turn to what sort of content will be most effective for those audiences. It is only after resolving these questions that delivery platforms should be considered. While the ABC’s abandonment of shortwave broadcasting has sparked fierce and sometimes emotional debate, much of the discussion has been on technological and financial issues, with little reference to the needs and preferences of target audiences.

FUTURE DIRECTIONS

The lessons from other international broadcasters — both winners and losers — is that a viable future for an Australian IPB requires the government, as the broadcaster’s major funder, to determine the value of international broadcasting as an effective soft power tool. If it decides it has value, it should articulate its strategic priorities in its broadcasting endeavours. That is not the same as allowing government to direct or influence the editorial tone of the broadcaster’s services. It is the quality, independence and credibility of the international broadcaster that is the key to its success as an effective soft power tool.

Articulation of its intentions also gives government a fresh opportunity to identify the best vehicles for delivering Australia’s international

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broadcasting services. By charter, it is the ABC which is mandated to provide international broadcasting services, but recent actions by both broadcaster and government suggest that this charter obligation is disregarded while the Broadcasting Review points to a wider approach to Australian international broadcasting — less public and more private.

The ABC has responded to the series of budget cuts it has suffered in recent years by eviscerating its international services and all but eliminating output in languages other than English. At the same time, Australia's other government-funded broadcaster, SBS, has continued to create multi-platform content in a wide variety of languages, targeted at migrant and indigenous communities. For the past five years, annual government funding for SBS has been steady at just over \$280m. Technological and social change have erased any rational case for continued institutional separation of non-English broadcasting. SBS has built and maintained considerable expertise in this field which would be a valuable resource in any Australian reinvigoration of its international broadcasting. The ethos and values set out in SBS's charter are also well aligned with those of the ABC.

Finally, if Australia's international public broadcaster is going to have the recognition and funding necessary to support its role as a core tool of Australia's public diplomacy, bureaucratic responsibility for its funding should lie with the department responsible for public diplomacy, the Department of Foreign Affairs and Trade, rather than the Department of Communications and the Arts whose perspective is naturally domestic.

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Overall, the global experience shows that despite the major technological changes, the shifting geostrategic balance and the array of choice at least in some regions, international public broadcasting remains a core element of public diplomacy for some of the world's most effective soft power proponents.⁴⁶

Coupled with a solid legacy of 80 years of broadcasting internationally, Australia's political, economic and geographical positioning within a rapidly-transforming Indo-Pacific region suggests that international broadcasting can still play an important role in furthering the national interest. It is a crowded arena, but international broadcasting is a potent soft-power tool for projecting Australia's image, underscoring Australian values and drawing other nations closer at a time of global disruption and unease.

CONCLUSIONS AND RECOMMENDATIONS

International public broadcasting continues to be an effective means of supporting a nation's strategic priorities provided that:

- The funding government has a clear strategy for the projection of the nation's soft power;
- The funding government identifies the fitting level of funding and makes a long-term commitment to it;
- The IPB has a clear mandate and a strong understanding of how domestic and international activities are interlinked and mutually reinforcing;
- What is broadcast is credible, accessible, relevant and distinctive.

In the absence of these conditions, it is preferable to withdraw decisively and use other forms of soft power projection that reflect national strengths. However, as argued here and in the 2010 report, international broadcasting is one of the most effective forms of public diplomacy, if managed properly.

In the past few years, the Australian Government has not met any of these criteria. The ABC at senior level has also shown little understanding of the fundamentals of managing an effective international broadcasting service.

Given the proliferation of delivery mechanisms and the costs of delivery, Government and IPB need to agree on a clear statement of objectives, and the geographical and demographic priority targets to meet those objectives.

This agreement must also include precise criteria for assessing success.

This report therefore recommends:

1. The Australian government should define its vision for Australia's international broadcasting in the context of reinstating international public broadcasting as a key component of the nation's strategic soft power projection of national interest.
2. As the purpose of international broadcasting is to project Australia's soft power, the responsible and funding ministry should be the Department of Foreign Affairs and Trade.
3. Given the geostrategic importance that Australia has accorded the Pacific, with its continuing deficit of credible, informative and relevant news services, this region should be the priority for renewed and revamped broadcasting services.

4. In making the Pacific a priority, Australia's international broadcasting should build on its perceived strengths, including its robust news media, its experience in broadcasting to multi-lingual and multi-cultural audiences both domestically and internationally, its long-term development partnerships with Pacific nations as well as its experience in using media in disaster preparation and mitigation.
5. To achieve these ends a new international broadcasting body should be established drawing on the expertise of the ABC, SBS (including NITV), other Australian media including for-profit operators, as well as practitioners in the target communities and their diasporas.
6. This body should be funded on a consistent and long-term basis.

APPENDIX - SURVEY OF INTERNATIONAL PUBLIC BROADCASTERS

This survey reviewed thirteen international public broadcasters, in addition to the ABC, to determine how international public broadcasting had fared in the years since the publication of the Lowy Institute's 2010 paper. In contrast to Australia's international broadcaster, the survey found a number of IPBs over the course of this decade which have consolidated and even expanded their operations, with increased funding from governments which recognise their power as public diplomacy and soft power tools. There are two exceptions: Canada and the Netherlands. Another, Al Jazeera, has been buffeted by regional politics but has endured. New Zealand stands out as comparatively tiny and specialised, but is a reliable broadcaster with a good understanding of its audience.

UNITED KINGDOM

This decade, the most positive broadcasting turnaround has been in the fortunes of the BBC World Service (BBCWS). The previous decade, government austerity budgets forced cuts and efficiency savings leading to closure of many language services, especially the European ones. In 2012 the Foreign Office grant-in-aid to the BBCWS was terminated, leaving the BBC to fully fund the World Service from the BBC licence fee (which was not increased).⁴⁷

The austerity period was nevertheless marked by some new investment, notably in Arabic and Persian TV services. The latter, which began in 2009, is now watched by roughly 20 per cent of the TV audience in Iran⁴⁸. However, in 2015 as a result of the National Security Strategy and Strategic Defence and Security Review, the UK government awarded the BBC extra funding of GBP 85m a year (AUD 157m) until 2020 to fund 11 new language services, enhanced services in Arabic and Russian and digitisation of the existing international services.⁴⁹ This brought the BBCWS total annual expenditure to GBP 268m.⁵⁰ The government has not guaranteed this additional funding beyond 2020.

The BBCWS's international broadcasting priorities are clear: strategically they include countering the disruptive efforts of broadcasters such as RT and non-state organisations in the Arab world; geographically the emphasis is on Africa (where the BBC regards itself as competing primarily with China), and South Asia.

In audience terms the BBCWS remains the leading IPB by some distance. In 2019, its claimed global weekly audience is 319 million.⁵¹

The BBC continues to broadcast on SW in some parts of the world, but is scaling this back. According to BBC sources, in many parts of the world, research shows rapidly declining audiences, even in traditional SW strongholds. The BBCWS approach has been to let contracts lapse as opposed to an overt policy of retrenchment.

CHINA

After significant investments in China's international broadcasting in 2009, China has become even more ambitious this decade.⁵² In March 2018, it amalgamated its three domestic and international broadcasting networks — China Central Television (CCTV), China National Radio and China Radio International — into one 'Voice of China' entity, in a move aimed at strengthening China's international media presence while consolidating the Chinese Communist Party's control. The media release on the amalgamation issued by Xinhua, the Chinese Government news agency, positioned the restructuring as “significant in following the principle of the Party exercising leadership over media”.⁵³

Just two years prior to the launch of Voice of China (known in China as China Media Group (CMG)), the foreign language operations of CCTV, the state broadcaster, were re-branded as China Global Television Network (CGTN). CGTN retains its separate identity but under CMG management and controlled by the Communist Party's Publicity Department, the agency responsible for propaganda and media censorship.⁵⁴ CGTN English is the flagship channel of the multi-language, multi-platform media group, which also broadcasts in Spanish, French, Arabic and Russian across a range of digital platforms.⁵⁵ Headquartered in Beijing, it has production centres in Washington and Nairobi.

Despite these investments cementing China's reputation as one of the world's largest broadcasters, the effectiveness of its international broadcasting as a propaganda or soft power tool for China remains unclear.⁵⁶ Superficially, the headline numbers for CGTN are strong — it has 62 million followers on Facebook, for example — but two-thirds of CGTN's online traffic comes from China itself.⁵⁷

China Radio International continues to use shortwave broadcasting extensively but has added other communication platforms. It broadcasts in 61 languages, is affiliated with close to 70 overseas radio stations, has 18 global internet radio services and claims to receive 3 million “pieces of audience feedback” annually.⁵⁸

Although the reported investments are immense, secrecy about Voice of China's budget persists. Adding to the reported US\$6.6 billion invested in 2009,⁵⁹ the rapid promotion and expansion of its overseas broadcasting services suggests that China continues to invest significantly in its soft diplomacy flagship. A more recent estimate puts China's budget for “external propaganda” at \$10bn annually.⁶⁰

UNITED STATES

In its FY2019 Congressional Budget Justification, the US Agency for Global Media (USAGM) highlighted its strategic alignment to the US National Security Strategy, as well as its efforts in confronting state-sponsored disinformation and accelerating the shift to digital and interactive platforms.⁶¹ While the broadcasting conglomerate was requesting a reduction of USD24m over the previous year's allocation, its USD661m is still very significant globally and serves to highlight its strategic alignment to the US National Security Strategy.⁶² USAGM is unique among Western broadcasters in that government legislation explicitly obliges its broadcasting to align with US foreign policy objectives.⁶³

USAGM, formerly the Broadcasting Board of Governors, has five fully funded international public networks: Voice of America (VOA) which was first broadcast in 1942 into Nazi Germany; Radio Free Europe/Radio Liberty which started in 1950 broadcasting into communist Czechoslovakia; the Office of Cuba Broadcasting with its Radio and TV Marti which started in 1985 and 1990 respectively; Radio Free Asia which commenced in 1996; and the Middle East Broadcasting Networks which started in 2004. Together, these five networks broadcast in 58 languages reaching a weekly audience of 345 million.⁶⁴

The agency claims that a firewall insulates journalists from US Government influence and political pressure, aside from its foreign policy mandate. This does not isolate them completely, however, with any new agency CEO now to be appointed by the President and confirmed by the US Senate under new legislation.⁶⁵

GERMANY

Deutsche Welle's Federal government funding was €358m in 2017, a 13 per cent increase over the previous year.⁶⁶ Its funding is based on an agreed 4-year plan, with strict limits on how much advertising it can accept. It claims a 157 million weekly audience and has grown considerably since 2013, when the audience was 101 million.⁶⁷

Celebrating its 65th anniversary in 2018, DW began in 1953 as a German-only SW radio service, adding other languages the following year. Its academy, DW Academy, was founded in 1965 and has trained journalists worldwide. DW's TV and internet services commenced in the 1990s, and now has online output in 30 languages and TV in 4.⁶⁸

The significance of DW's standing as an effective public diplomacy tool was put under the spotlight in 2018 when the right-wing populist AfD party called for changes in DW's statutory basis. In a debate in the Bundestag they particularly attacked DW's support for "tolerance". All other parties expressed strong support for DW.

FRANCE

France was an early mover in establishing an IPB, starting Le Poste Colonial in 1933, the predecessor of today's Radio France Internationale (RFI). The current framework dates from the mid-1970s after significant political and financial disruption as a wing of the dysfunctional domestic broadcaster, ORTF.⁶⁹

The successful renaissance for RFI is largely due to its focus on Africa, particularly Francophone countries, and targeting local audiences rather than expatriates.⁷⁰

Further reorganisation in the mid-2000s placed RFI within the remit of a new agency, France Médias Monde, together with other French public international broadcasters France24, and the Arabic language radio station Monte Carlo Doualiya. France Médias Monde is an "implementing agency" of France's Ministry of Foreign Affairs and International Development, which provides most of RFI's funding of 256 million Euros in 2019.⁷¹

Unlike the merged radio/TV/online presences of BBCWS and DW, RFI and France24 remain separate platforms. France24 is a video-based news channel on air and online 24/7 in French, English and Arabic along with Spanish TV broadcasting 6 hours daily.⁷² RFI has radio and online services in 14 languages, available on FM, MW and SW frequencies.

The third network, Monte Carlo Doualiya (now known as MCD) targets audiences in the Middle East, Mauritania, Djibouti and South Sudan; its radio output is available on FM and MW but no longer on SW. It also has an audience among Arabic speakers in France.

The Francophonie channel TV5MONDE is a joint endeavour between France Médias Monde, and the national broadcasters of Switzerland, Belgium and Canada.

RUSSIA

RT, as Russia Today has called itself since 2009, is a later and very different entrant into the international broadcasting arena.

RT describes its mission as "to make available an alternative point of view on world events, especially Russia-related ones." It asserts that it is not a propaganda vehicle for the Russian Government but covers stories overlooked or underreported by the mainstream media; provides alternative perspectives on current affairs; and questions assumptions and clichés that may underlie other presentations of news and current affairs globally.⁷³

Launched in 2005, RT now has eight TV channels broadcasting in Arabic, English, Russian, and Spanish. RT America, RT UK and RT France are dedicated channels for their respective target countries.⁷⁴ There are also

online news services in French and German. RT's main focus is on Europe and the Americas, largely neglecting the Pacific.

The Russian government investment in RT is significant: reports range from 19 billion rubles⁷⁵ (approx.. AUD400m) in 2016 to USD300m⁷⁶ (AUD420m) in 2017. Advertising brings an estimated GBP 750 000 (AUD 1.4m) a year for the UK channel.⁷⁷

Organisationally separate from RT but pursuing a similar agenda is Sputnik International which combines international radio and online services (formerly Voice of Russia) with an international newswire (the international services of the former Novosti Agency). Sputnik has approximately 800 hours a week of radio output in some 30 languages; languages include English, Chinese, Spanish and Arabic. Sputnik is widely regarded in the West as a key element of Russian efforts to spread disinformation.

NEW ZEALAND

Radio New Zealand Pacific (RNZ Pac) is one of the smallest international broadcasters with an annual budget of just NZD1.9m,⁷⁸ but is notable for its stability. It focuses on the Pacific island nations including PNG, and its rebranding reflects its mission more accurately. TVNZ is a commercial entity, but provides news and programming to stations around the Pacific.

Alongside RNZ and TVNZ is Pacifika TV (Pacific Cooperation Broadcasting Limited) which was established in 2015. Funded through the NZ Ministry of Foreign Affairs and Trade and Pacific Cooperation Foundation, it provides NZ-originated content to other Pacific broadcasters and supports their production of local content with field equipment and training.

JAPAN, SOUTH KOREA, INDIA

Japan, South Korea and India provide significant state funding for international public broadcasting through their respective domestic public broadcast organisations. Japan's NHK stands out in this group as one whose financial basis has improved against expectations earlier this decade.

Funding for NHK World and South Korea's KBS comes from household TV licence fees. India's Doodorshan international TV channel (DD-India) and All India Radio (AIR) along with a second Korean IPB, Arirang, are funded from general tax revenues through the respective controlling ministries.

NHK World Japan provides content for TV (in English), radio (17 languages) and online in addition to a TV and a radio channel targeted at Japanese overseas. Funding has grown in recent years; the proportion of licence fee income ring-fenced for NHK World has risen from 3 per cent

to 4.4 per cent of the total, approximately ¥31 billion (almost AUD400 million).⁷⁹ In mid-2018, Japan rebranded the service from "NHK World TV" to "NHK World Japan", to "establish wider global recognition for the service's Japanese roots in the lead up to the Tokyo 2020 Olympic and Paralympic Games".⁸⁰

Korea's KBS World TV and KBS World Radio target expatriate Koreans on themes of reunification, although many TV programs are subtitled in English (97 per cent), Chinese (21 per cent) and Malay (10 per cent). Arirang sees itself as a "media diplomacy channel" with a focus on providing news and information about Korea. KBS has faced accusations that conservative-government appointed governors have dictated programming.⁸¹

India's IPBs receive funding from the Ministry of Information and Broadcasting, although under legislation, funding for the IPBs is the responsibility of External Affairs. Their reluctance to pay leads to intermittent threats to close DD-India and AIR.⁸² AIR has 27 languages on air and online of which 12 are Indian and 15 foreign, although English output predominates.

In terms of audience measurement, these broadcasters highlight reach rather than actual user figures, which can be assumed to be generally a much smaller number.

AL JAZEERA

Al Jazeera commenced as an Arabic broadcaster in 1996, funded almost entirely by the then Emir of Qatar, Sheikh Hamad bin Khalifa al-Thani. Its English-language television service, which is seen as more independent of Qatar than its Arabic sister channel, was introduced in 2006.⁸³ At the time of the Lowy Institute's 2010 report, Al Jazeera was planning a significant global expansion, with additional bureaux in the pipeline. In the past decade, however, Qatar has shifted priorities and tightened budgets, and has curbed the broadcaster's ambitious plans.

Al Jazeera America was launched in 2013 but closed two years later, its failure attributed to changing media industry economics restrictive distribution agreements and internal turmoil. As *Fortune* magazine pointed out, "... at a time when ISIL and anti-Islamic sentiment is such an issue, the name of the channel probably didn't help."⁸⁴

A year later, the shuttering of Al Jazeera was among demands put to Qatar by a group of Arab nations led by Saudi Arabia in response to Qatar's apparent support for extremist groups. Saudi Arabia, the UAE, Egypt, and Bahrain had severed relations with Qatar for its promotion of the Muslim Brotherhood and other Sunni Islamists around the region "including those who have advanced extremist or sectarian views on the channel". The network, in turn, accuses them of attempting "to silence the freedom of expression in the region."⁸⁵

Despite the challenges, Al Jazeera maintains a global media network with more than 70 bureaux and a staff of more than 3000.⁸⁶

THE NETHERLANDS

Radio Netherlands Wereldomroep/Worldwide no longer broadcasts. In June 2011 the Netherlands government cut RNW's budget from €46m to €14m. A year later both the Dutch (May 2012) and English (June 2012) services ceased.⁸⁷

Before its demise RNW was funded by the Dutch Education and Culture Ministry which gave RNW about 6 per cent of total government funding for media. The Dutch Foreign Ministry now funds an NGO, RNW Media, with a mandate to promote free speech through new media. It has websites in English, Arabic, Mandarin, French and Spanish. About 30 staff remain at the base in Hilversum, compared with 300 in 2012. RNW Media describes its mission as:

“a centre of expertise that builds digital communities for social change. We use online media to engage young people on sensitive and often-taboo subjects ... By facilitating their access to information and amplifying their voices, young people can contribute actively to making their societies more inclusive.”⁸⁸

Government funding is on a severe taper, and from 2020 RNW Media is expected to compete for all of its funding.

CANADA

Canada has placed negligible emphasis on international broadcasting in the past two decades, a decline which predated the Lowy Institute's 2010 survey.

After 67 years of SW broadcasting, Radio Canada International was reduced to an internet-only platform by mid-2012. The Harper Government's cuts that year to the Canadian Broadcasting Corporation slashed 80 per cent of RCI's budget from CAD12.3m to CAD2.3m.⁸⁹ Seven years later and despite a significant CAD150m reinvestment plan in CBC under the Trudeau Government, RCI remains essentially domestic CBC programming offered in five languages — English, French, Spanish, Mandarin and Arabic — via RCInet.ca. French-Canadian content is broadcast through TV5Monde. The ongoing insignificance of RCI to CBC's strategic directions is reflected in its 2019 Corporate Plan in which the only reference to RCI is about access to the service via the internet.⁹⁰

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