

0113

MASTER PLAN STUDY
ON
THE DEVELOPMENT OF RADIO AND TV BROADCASTING
IN
THE KYRGYZ REPUBLIC

FINAL REPORT
(MAIN REPORT)

FEBRUARY 1995

NIKOLAIY P. ...

0113

JAPAN INTERNATIONAL COOPERATION AGENCY
STATE NATIONAL BROADCASTING COMPANY
MINISTRY OF COMMUNICATIONS
KYRGYZ REPUBLIC

MASTER PLAN STUDY
ON
THE DEVELOPMENT OF RADIO AND TV BROADCASTING
IN
THE KYRGYZ REPUBLIC

FINAL REPORT
(MAIN REPORT)



FEBRUARY 1995

NHK Integrated Technology Inc.

国際協力事業団

27541

Currency Exchange Rate used throughout the Study

US\$ 1 = 10 Som = 100 Japanese Yen as of August 1994

PREFACE

In response to a request from the Government of the Kyrgyz Republic, the Government of Japan decided to conduct a Master Plan study on the Development of Radio and TV Broadcasting in the Kyrgyz Republic and entrusted the study to the Japan International Cooperation Agency (JICA).

JICA sent to the Kyrgyz Republic a study team headed by Mr. Susumu Toyoda, Senior Chief Engineer of the International Department of NHK Integrated Technology Inc., three times between December 1993 and February 1995.

The team held discussions with the officials concerned of the Government of the Kyrgyz Republic and conducted field surveys at the study area. After the team returned to Japan, further studies were made and the present report was prepared.

I hope that this report will contribute to the promotion of the project and to the enhancement of friendly relations between our two countries.

I wish to express my sincere appreciation to the officials concerned of the Government of the Kyrgyz Republic for their close cooperation extended to the team.

February 1995



Kimio Fujita

President

Japan International Cooperation Agency

February 1995

Mr. Kimio Fujita
President
Japan International Cooperation Agency
Tokyo, Japan

Letter of Transmittal

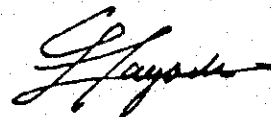
We are pleased to submit to you the Master Plan Study Report on the Development of Radio and TV Broadcasting in the Kyrgyz Republic.

The study was conducted by NHK Integrated Technology Inc. during the period from December 1993 to February 1995 under a contract with JICA. In the study, we formulated the Master Plan for establishing the framework for broadcasting services in the Kyrgyz Republic, which would be most appropriate for the country, thoroughly taking the current situation of the Republic into consideration.

We wish to take this opportunity to express our gratitude to the officials concerned in your office, the Ministry of Foreign Affairs and the Ministry of Posts and Telecommunications. We also express gratitude to the officials concerned of the State National Broadcasting Company, the Ministry of Communications, the State Commission on Foreign Investment and Economic Assistance of the Kyrgyz Republic, and the Japanese Embassy in Russia for their cooperation and assistance extended to us to facilitate our field survey.

We should be grateful if this report would contribute to a further promotion of the Project for the Development of Radio and TV Broadcasting in the Kyrgyz Republic.

Very truly yours,



Susumu Toyoda
Chief of the Master Plan Study Team on
the Development of Radio and TV
Broadcasting in the Kyrgyz Republic,
NHK Integrated Technology Inc.

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ABBREVIATIONS

ABC	: American Broadcasting Company
ABU	: Asia-Pacific Broadcasting Union
AM	: Amplitude Modulation
APC	: Automatic Programme Control
ASIA-SAT	: Asia-Satellite
BBC	: British Broadcasting Corporation
BHN	: Basic Human Needs
B-ISDN	: Broad-Band Integrated Services Digital Network
CCD	: Charge Coupled Device
CCIR	: Comité Consultatif International des Radio-Communications
CCITT	: Comité Consultatif International Télégraphique et Téléphonique
CCU	: Camera Control Unit
CD	: Compact Disk
CH	: Channel
CIS	: Commonwealth of Independent States
DAT	: Digital Audio Tape Recorder
DBS	: Direct Broadcasting Satellite
EDTV	: Enhanced Definition Television
EFP	: Electronic Field Production
ENG	: Electronic News Gathering
FM	: Frequency Modulation
FPU	: Field Pickup Unit
GDP	: Gross Domestic Product
GHz	: Gigahertz
GNP	: Gross National Product
GOSKOMINVEST	: State Commission on Foreign Investment and Economic Assistance
GOSTELERADIO	: State Commission on Television and Radio
HDTV	: High Definition Television
IMF	: International Monetary Fund
INTELSAT	: International Telecommunications Satellite Organization
ISDB	: Integrated Services Digital Broadcasting

ISO : International Organization for Standardization
 ITU : International Telecommunications Union
 JAMCO : Japan Media Communication Center
 kHz : kilohertz
 kV : kilovolt
 kVA : kilovolt ampere
 kW : kilowatt
 MHz : Megahertz
 MIL : Million
 MOC : Ministry of Communications
 MPEG : Motion Picture Encoding Engineer Group
 mV/m : millivolt per meter
 NMP : Net Material Product
 OB van : Outside Broadcasting van
 OBC : Oblast Broadcasting Company
 PAL : Phase Alteration by Line
 RBL : Rouble
 RTV : Russia TV
 SE : Sound Effect
 SECAM : Séquentiel à Mémoire
 SNBC : State National Broadcasting Company
 STL : Studio to Transmitter Link
 S-VHS : Super Video Home System
 3P : Three-Plumbicon
 THS : Thousand
 TRT : Turkish Radio-Television Corporation
 TVRT : Corporation for TV & Radio Broadcasting and Radiorelay
 Trunk-lines
 UHF : Ultra High Frequency
 UNESCO : United Nations Educational, Scientific and Cultural
 Organization
 VA : Volt Ampere
 VAT : Value Added Tax
 VCR : Video Cassette Recorder
 VHF : Very High Frequency
 VHS : Video Home System
 VOA : Voice of America
 VTR : Video Tape Recorder
 WARC : World Administrative Radio Conference

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Chapter 1 Introduction

Chapter 1 Introduction

1.1 Structure of the Final Report

The Final Report consists of the Main Report, the Supporting Report, the Data File, and the Summary. The following is the Main Report.

1.2 Background of the Study

The Kyrgyz Republic is a multi-ethnic nation with a population of 4.502 million. It gained its independence from the Soviet Union in 1991. The Kyrgyz Republic has replaced the old Soviet system of government and is now pursuing an independent course towards the national goals of democratization and the introduction of a market economy.

The television and radio network of the Kyrgyz Republic were originally constructed as a part of the television and radio networks of the Soviet Union and were operated on a budget and facilities allocated by Moscow.

The capital Bishkek has 10 radio services and 7 television services. Among them, 2 radio services and 1 television service are run by the state. These state-run services reach almost nationwide.

Programmes of these state-run services are produced by the State National Broadcasting Company (hereinafter referred to as the SNBC) and transmitted by the Ministry of Communications (hereinafter referred to as the MOC).

The Kyrgyz government hopes that improving the information transmission function of broadcasting will play an important role in achieving the national goals mentioned above. It has requested Japan to formulate a plan for the construction of a nationwide radio and television broadcasting network.

In response to the above request, the Japan International Cooperation Agency (hereinafter referred to as JICA) conducted a preliminary study in July 1993. JICA then concluded an agreement with the government of the Kyrgyz Republic.

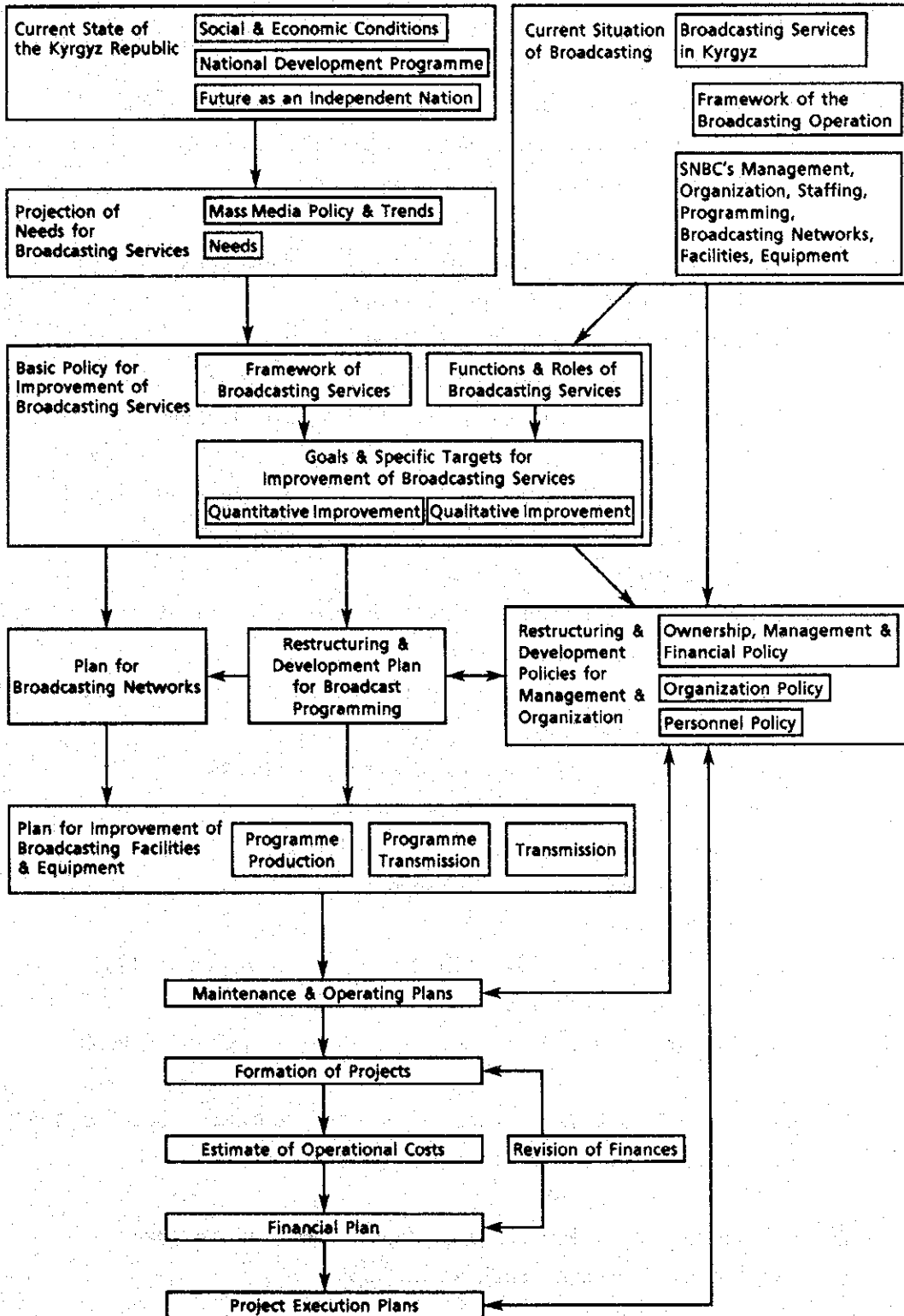
This study was conducted according to the agreement.

1.3 Purpose of the Study

The purpose of the study is to formulate a Master Plan to develop nationwide broadcasting services in the Kyrgyz Republic that can respond to the nation's shift towards a democratic system of government and a market economy. The Master Plan will include measures to improve management, programme production and broadcasting facilities.

Technology transfers will be made to counterparts in the Kyrgyz Republic through the implementation of this Study.

1.4 Structure of the Master Plan



1.5 Study Schedule

The study was conducted according to the following schedule:

- (1) Preparation prior to Study (in Japan) December 1993
Collection of related materials & information
Compilation of the Inception Report
- (2) First Phase of On-Site Work (in Kyrgyz) January-March 1994
Explanation of the Inception Report
Collection of materials & information data
On-site investigations of important locations
Compilation & explanation of the Progress Report
- (3) First Phase of Work (in Japan) May-July 1994
Formulation of Basic Policy for Improvement of
Broadcasting Services
Formulation of Restructuring & Development Plan for
Broadcast Programming
Formulation of Restructuring & Development Policies for
Management & Organization
Formulation of Plan for Broadcasting Networks
Formulation of Plan for Improvement of
Broadcasting Facilities & Equipment
Compilation of the Interim Report
- (4) Second Phase of On-Site Work (in Kyrgyz) July-August 1994
Explanation of the Interim Report
Supplementary survey of the First Phase of On-Site Work
- (5) Second Phase of Work (in Japan) September-October 1994
Compilation of the Draft Final Report
- (6) Third Phase of On-Site Work (in Kyrgyz) November 1994
Explanation of the Draft Final Report
- (7) Third Phase of Work (in Japan)
Compilation of the Final Report November 1994-February 1995

1.6 Organization for the Study

1.6.1 Structure

The JICA Study Team has been made up of nine members, including specialists in six fields related to broadcasting services.

JICA organized a Work Supervision Committee to enable the JICA Study Team to conduct its Study properly and efficiently.

To cooperate with the JICA Study Team, the Kyrgyz side established Counterpart Teams for the different specialist fields, composed of staff from the SNBC, MOC, and GOSKOMINVEST.

In addition, the Kyrgyz side organized a Steering Committee, composed of representatives from the related organizations, to facilitate the smooth progress of the Study.

The structure for the Study is shown in Figure 1.6.1-1.

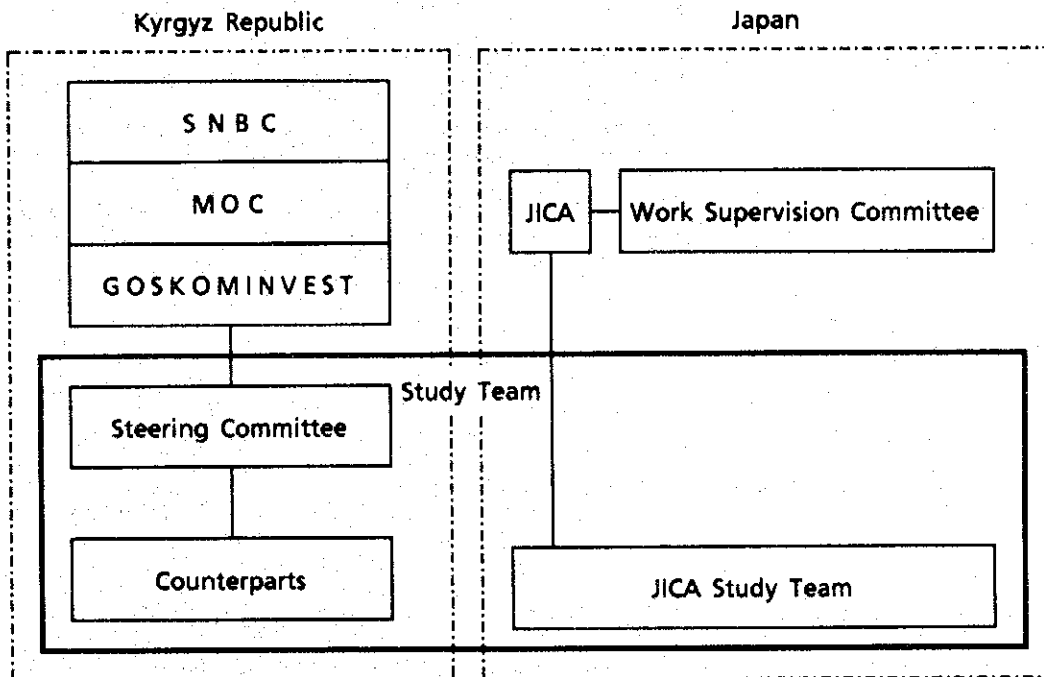


Figure 1.6.1-1 Study Structure

1.6.2 Japanese Team Members

(1) JICA Study Team

Assignment	1st Phase Name	2nd Phase Name	3rd Phase Name	Affiliation
Team Leader	TOYODA Susumu	TOYODA Susumu	TOYODA Susumu	NHK ITEC
Broadcasting Development & Utilization/ Organization Planning	NAKAHATA Yujiro	NAKANO Shozo		NHK ITEC
Management/Financial Planning	HIRAMATSU Kenji	HIRAMATSU Kenji	HIRAMATSU Kenji	Tohatsu & Co.
Analysis of Socio-Economic Conditions/Projection of Needs for Broadcasting Services	SUZUKI Shuji	SUZUKI Shuji		NHK ITEC
Broadcasting Facilities Planning (1)	WATANABE Ikuo	WATANABE Ikuo	WATANABE Ikuo	NHK ITEC
Broadcasting Facilities Planning (2)	KATAYAMA Masanobu	KATAYAMA Masanobu		NHK ITEC
Broadcast Programming	SASAKI Makoto	KITAYAMA Setsuro	KITAYAMA Setsuro	NHK ITEC
Interpreter	HAYASHI Konosuke	HAYASHI Konosuke	HAYASHI Konosuke	NHK ITEC
Coordinator	FUJII Yoshiichi	FUJII Yoshiichi		

(2) Advisory Committee

Assignment	Name	Affiliation
Chairman/Broadcasting Networks	TAKAHASHI Tomio	Special Advisor, Minister's Secretariat International Affairs Department, Ministry of Posts & Telecommunications
Organization & Management	YOSHIDA Masao	Development Specialist, JICA
Programming	KOBAYASHI Yoichi	Chief of Technology Section, Cablecast Technology Office, Broadcasting Bureau, Ministry of Posts & Telecommunications
Programming	UMEYA Kinghichi	Chief of Development Section, Cablecast Technology Office, Broadcasting Bureau, Ministry of Posts & Telecommunications

(3) JICA Headquarters

Assignment	Name	Affiliation
General Coordination	SUGAWARA Takashi	Second Development Study Division, Social Development Study Department
Study Supervision	KANBE Hiroshi	Consultant Contract Division, Procurement Department

1.6.3 Kyrgyz Republic

(1) State National Broadcasting Company

President.

Abdilamit M. MATISAKOV

First Vice-President.

* Eshmukhambet K. JANTELIEV

Technical Manager of the
Radio & TV Centre.

* Mirbek J. MURZABEKOV

(2) Ministry of Communications

Minister.

Emil Z. BEKTENOV

First Deputy Minister.

* Abdyjapar T. TAGAEV

Director General of the Corporation
for TV & Radio Broadcasting and
Radiorelay Trunk-lines.

* Ruben A. ABDUVALIEV

Chief of the Department of
Telecommunications, Broadcasting
and Posts.

* Orozbek K. KWATOV

Assistant to the Minister.

Nikolai. I. GRISHIN

(3) State Commission on Foreign Investment and Economic Assistance

Vice Chairman, Director General.

Askar I. SARYGULOV

Chief Specialist,

* Salmor A. ALYMKULOV

Department of Investment Projects.

* Members of the Steering Committee

**Chapter 2 Current State of
the Kyrgyz Republic**

Chapter 2 Current State of the Kyrgyz Republic

2.1 Overview

(1) Geography

The Kyrgyz Republic is located between 39°11' and 43°16' North Latitude and between 69°15' and 80°18' East Longitude. From north to south it extends 925 kilometres and from east to west 453.9 kilometres. The Republic is 199,900 square kilometres in area, about one half the size of Japan.

The Kyrgyz Republic shares a 4,508 kilometre border with the People's Republic of China to the east, the Republic of Kazakhstan to the north, the Republic of Uzbekistan to the west, and the Republic of Tajikistan to the south. (Figure 2.1-1)

The Kyrgyz Republic is dominated by the Tien Shan mountain system, which cuts across the country. The highest peak is Victory Peak (Pik Pobedy) in the Kokshaal-Tau ranges, with an altitude of 7,439 metres, followed by many other peaks of 5,000 to 6,000 metres that are permanently capped in snow. The lowest altitude in the Kyrgyz Republic is 401 metres; the average altitude is 2,750 metres. Only 5.8 percent of the nation's landmass is below the altitude of 1,000 metres, and most of the population live at the altitude of about 1,800 metres.

(2) Climate

In the Kyrgyz Republic characteristics of the climate vary considerably because of variable topographic features of the Tien Shan mountains that cover two-thirds of the nation. The nation can be divided into four climatic zones by altitude.

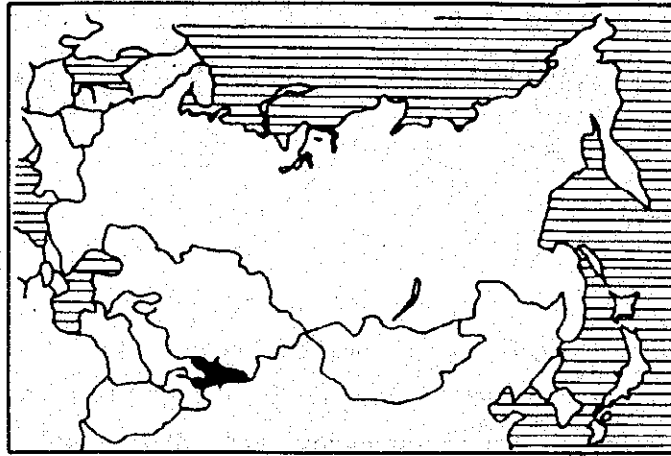


Figure 2.1-1 Location of the Kyrgyz Republic

* Basin and Alpine Areas (from the altitude of 500 to 600 metres to the altitude of 900 to 1,200 metres)

These areas are hilly, bordered by high mountains. It is hot in summer, and moderately cold in winter, with little snow and inadequate rainfall. These areas have a subtropical climate, typically represented by the area around the Fergana Basin in the south. The average summer temperature is around 30°C, with maximum temperatures of 44°C. As the altitude rises, the maximum temperature decreases, reaching as low as 27°C to 30°C. The average winter temperature is from -4°C to -7°C, with minimum temperatures of -22°C to -30°C.

* Average Altitude Alpine Areas (from the altitude of 900 to 1,200 metres to the altitude of 2,000 to 2,200 metres)

These areas are warm in summer and quite cold in winter, with continuous snow. The temperature is considerably lower than the Basin and Alpine areas described above. The average temperature in summer is 18°C to 19°C, and in winter, -7°C to -8°C. The region's ice-free period, when the temperature does not fall below zero, exceeds seven months. At higher altitudes, the ice-free period is about six months.

* Alpine Areas (from the altitude of 2,000 to 2,200 metres to the altitude of 3,000 to 3,500 metres)

These areas are cool in summer and cold in winter, with heavy snowfall in some places. The temperature in July is between 11°C and 16°C, and in the long winter months from November to March, the average temperature is as low as -10°C. In this region the ice-free period is shorter, from three to four months. Some places at higher altitudes have no ice-free period at all. It means that even at the height of summer, the temperature can fall below zero on many days.

* Heavy Snowfall Areas (from the altitude of 3,500 metres)

These areas are characterized by their cold, harsh climate. The annual aggregate temperature above zero is only 0°C to 500°C. These areas are covered in perpetual snow and glaciers. Even at the lower altitudes, the average temperature in July is 4°C to 7°C, and in January, as low as -19°C to -22°C.

The change in the four seasons is distinct.

* Spring

Spring displays a continental influence. There are many mild days with some recurring cold and frost, as well as some heavy localized snowfalls.

* Summer

The summer is long and hot. The air is dry in some areas, but mountainous areas are cool with much rain. The average July temperature in areas under 1,000 metres is 22°C to 28°C. In areas between the altitudes of 1,000 - 3,000 metres, temperatures remain below 15°C.

* Autumn

The beginning of autumn is warm with dry, clear skies. Temperatures in September are similar to summer, but drop sharply in October. Toward the end of autumn there are many rainy days. There are also many cold days. High altitude areas are covered in snow which will remain till spring.

* Winter

Conditions vary in low-lying and valley areas; there are periods of warm, clear days followed by snow and bitter cold.

In the Kyrgyz Republic as a whole, a gentle breeze of 7 to 18 kilometres per hour blows on many days. More than half the time, there is a light breeze or dead calm, and 30 percent to 40 percent of the time, a gentle breeze. Only in a small fraction of the time there is a moderate breeze or a fresh breeze (of 21 to 36 kilometres per hour). Winds of more than 36 kilometres per hour can be observed in basins between mountain passes and valleys.

Most places rarely have moderate gales of more than 54 kilometres per hour. The region where such gales are most likely to blow is the Issyk-Kul Basin. The western part of the basin has about seventy days of moderate gales, and the eastern part, about fifty.

(3) Brief History

The Kyrgyz are Turkic people, formerly hunters who lived in the forest areas of the Kem River basin on the upper reaches of the Yenisey River. About 2000 years ago they were ruled by the Hsiung nu. Later, they were dominated by the Chinese and the Eastern Turks. The first time the name "Kyrgyz" appears in history is on an 8th century Turkic Orkhon inscription.

< Brief Historical Outline >

mid 6th century	Made part of the Turk Empire. Rapid assimilation of Turkic culture.
mid 8th century	Conquered by the nomadic Uigur Empire, which overcame the Turks.
late 13th century	Dominated by the Mongolian Yuan Dynasty.
16th to 17th century	Some of the Kyrgyz people move to the western Tien Shan mountains and the Fergana region.
late 18th century	Kyrgyz region is dominated by the Chinese Qing Dynasty.
late 19th century	Conquered by the Khanate of Kokand, established by the Uzbeks.
1863	The Russian Empire annexes northern Kyrgyzstan.
1873	The Russian Empire annexes southern Kyrgyzstan.
May 1918	After the Russian Revolution, becomes part of the Turkistan Autonomous Soviet Socialist Republic within the Russian Republic.

October 14, 1924	Following the establishment of borders among the peoples of Central Asia, becomes the Kara Kirgiz Autonomous Oblast of the Russian Republic.
May 25, 1925	Name change to the Kirgiz Autonomous Oblast.
February 1, 1926	Established as the Kirgiz Autonomous Soviet Socialist Republic.
December 5, 1936	Founded as the Kirgiz Soviet Socialist Republic, outside of the Russian Republic and becomes a constituent republic of the Soviet Union.
December 12, 1990	Declares sovereignty.
January 5, 1991	Changes name to the Kyrgyzstan Republic.
August 31, 1991	The Kyrgyzstan Republic declares independence.
May 5, 1993	The Republic adopts a new constitution and changes name to the Kyrgyz Republic.

(4) Administration

The Kyrgyz Republic currently consists of six oblasts and one administrative district: Jalal-Abad oblast, Issyk-Kul oblast, Naryn oblast, Osh oblast, Talas oblast, Chui oblast, and Bishkek administrative district, as shown in Figure 2.1-2. The areas of the oblasts are shown in Table 2.1-1.

The capital of the Kyrgyz Republic is Bishkek. The capitals of the respective oblasts and their populations are shown in Figure 2.1-2. (The details of the population will be given later.)

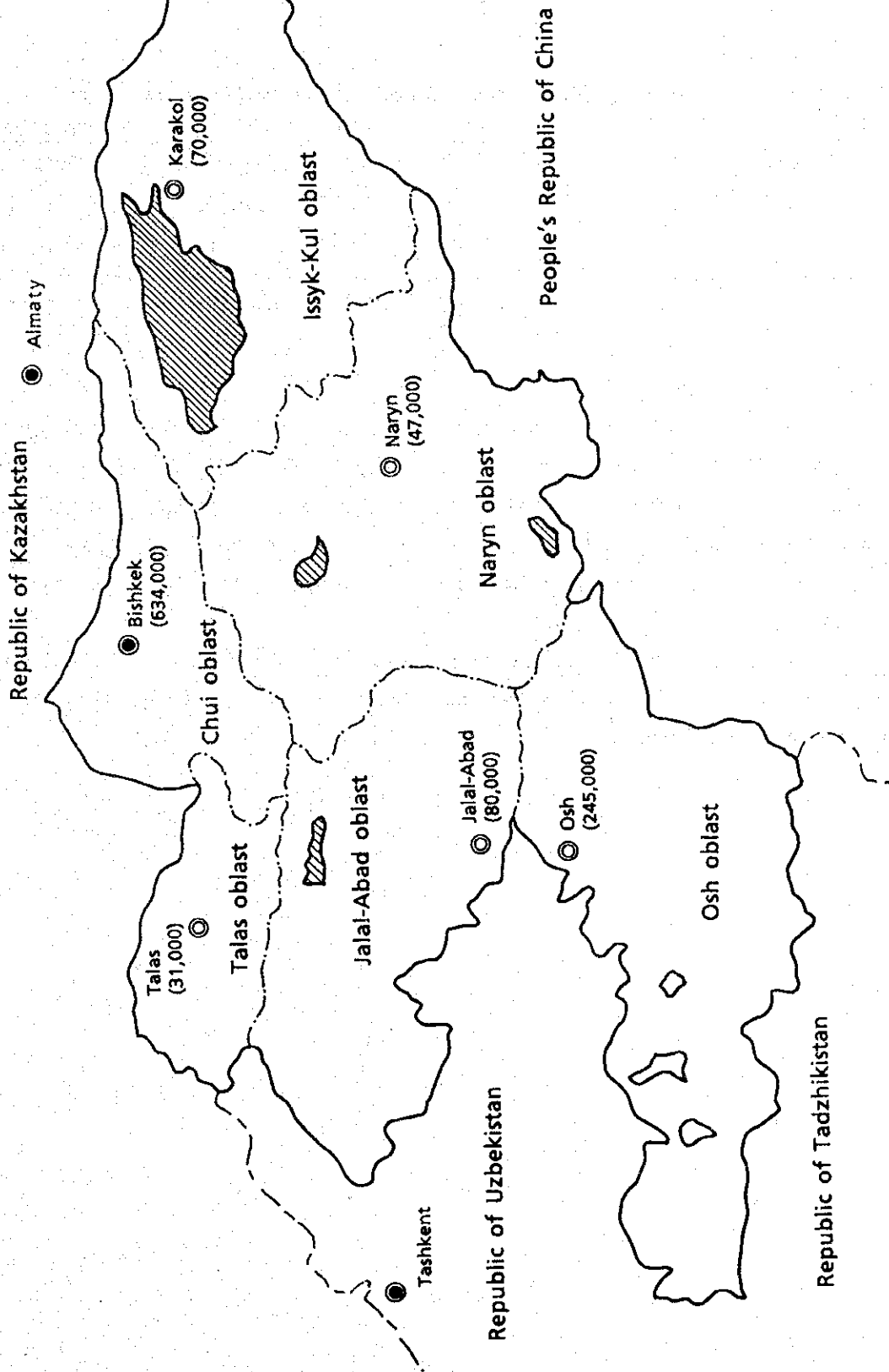


Figure 2.1-2 Kyrgyz Republic — Oblasts and Oblast Capitals

Table 2.1-1 Areas of the Respective Oblasts of the Kyrgyz Republic (1993)

(1,000 square kilometres)

	Jalal-Abad oblast	Issyk-Kul oblast	Naryn oblast	Osh oblast	Talas oblast	Chui oblast
Area	33.7	43.1	46.7	46.2	11.4	18.8*

* Including Bishkek administrative district

(5) Political System

The political system is headed by a President, assisted by a Vice-President, Prime Minister, First Deputy Prime Minister, and five Deputy Prime Ministers. Below these officials are the ministries, state commissions, national committees, agencies and inspection bureaus. Figure 2.1-3 shows the political system of the Kyrgyz Republic.

The legislature is unicameral. However, a referendum in October 1994 approved a Constitutional amendment for the introduction of a bicameral legislature.

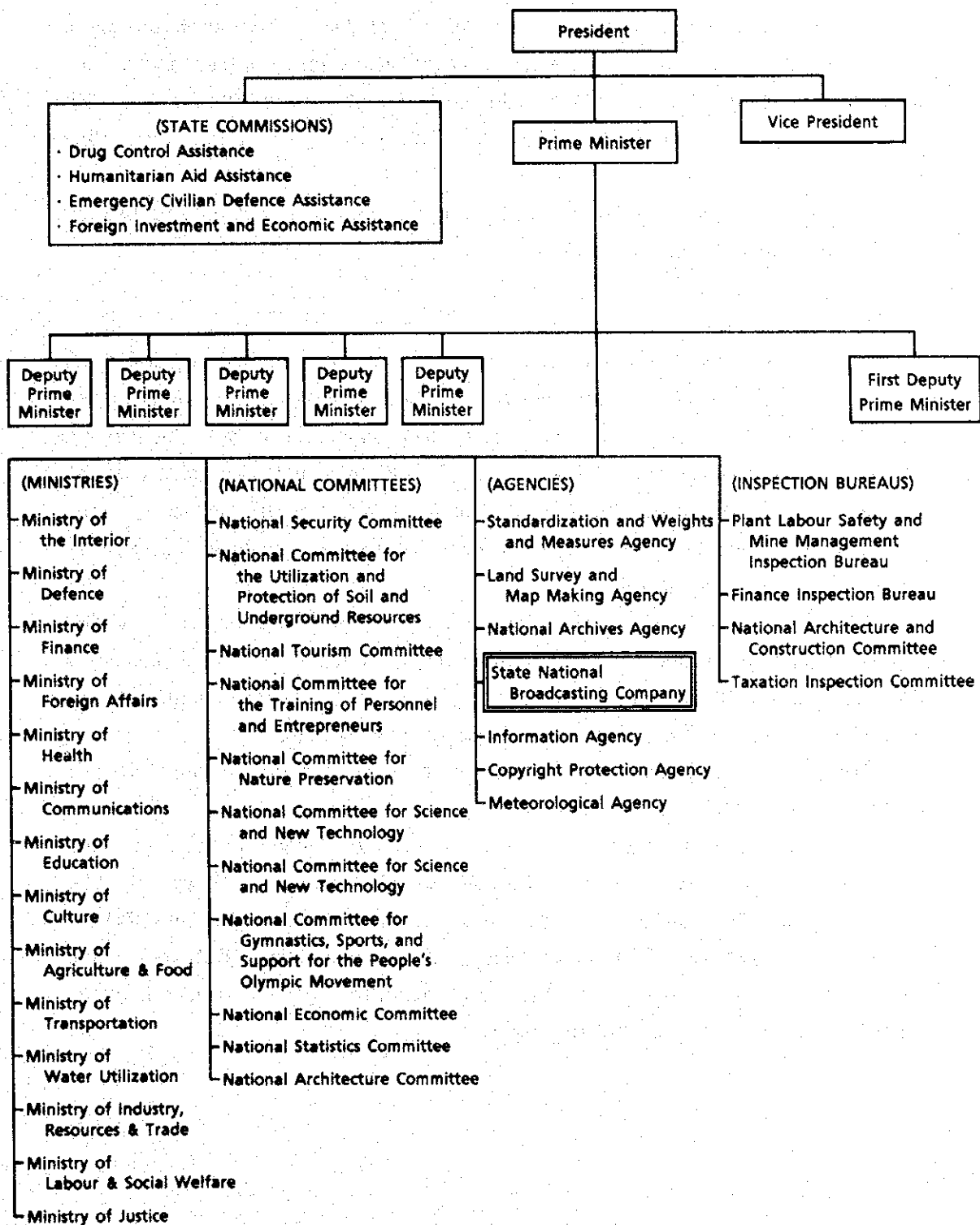


Figure 2.1-3 Political System of the Kyrgyz Republic

(6) Religion

The majority of the Kyrgyz are Sunni Muslims. The southern part of the republic embraced Islam at a relatively early date; there are many devout Muslims and strict adherence to the laws of Islam. The northern part of the nation did not embrace Islam until the 18th century.

The majority of the Russians living in the Kyrgyz Republic belong to the Russian Orthodox Church.

(7) Transportation

Transportation has been hindered for most of history by the Tien Shan mountain system, which dominates the country. However, the northern Tien Shan route of the Silk Road passes through the Kyrgyz Republic. This road was a meeting point of the cultures of the East and the West. Xuanzang, a famous Buddhist priest in the early Tang period of Chinese history, is said to have passed through the Kyrgyz Republic on his way to India.

Railways have never been developed in any large scale in the Kyrgyz Republic because of the mountainous terrain. There are only 372 kilometres of railtrack in the country, but international trains depart from the capital Bishkek for Moscow and Tashkent.

Automobiles are the main means of transportation in the nation. Roadways total 23,400 kilometres.

Air transport is not as active as in the former Soviet period. There is a domestic service to Osh in the south. Most of the international flights are to cities in the former Soviet Union: Moscow, St. Petersburg, Kiev, Almaty, Dushanbe, Baku, Tashkent, and Khabarovsk. Both Kyrgyz Airlines and Aeroflot have three to seven flights a week to these destinations.

(8) National Holidays

The Kyrgyz Republic has the following National Holidays.

January 1	New Year's Day
January 7	Christmas Day (Russian Orthodox)
March 8	International Women's Day
March 21	Islamic New Year's Day, the Spring Equinox Day
May 1	May Day
May 9	Victory Day (over Germany)
June 13	Memorial Day
August 31	Independence Day