
Israel -- Hebrew- and English-Language Media Guide



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1. Introduction

According to Freedom House, which describes itself as an "independent nongovernmental organization that supports the expansion of freedom in the world," "press freedom is generally respected in Israel, where an independent judiciary and an active civil society adequately protect the free media." This is contrary to the situation in most of the Middle East, which "continued to show the lowest region-wide ratings of press freedom," and where the media remains constrained by extremely restrictive legal environments, governmental crackdowns, and violence (www.freedomhouse.org).

Israel boasts a dynamic, aggressive, and ever-changing Hebrew- and English-language media dominated by three conglomerates that control the mainstream press and commercial television. The scope of permissible reporting is wide, and there is a broad range of published material. While the media remain subject to military censorship on matters affecting issues of national security, the advent of the Internet and 24-hour satellite broadcasting has lessened the censor's clout. Moreover, editors may appeal a censorship decision to a three-member tribunal that includes two civilians. The media represent the full spectrum of Israeli society providing the views of the left, right, religious, secular, and ethnic strata of the country. Key journalists, who reflect these political trends, are influential in shaping public opinion; the mainstream media, however, are often driven more by commercial than by ideological interests.

A wide variety of broadcast media is available in Israel. The Israel Broadcasting Authority operates public radio stations and television services, and the Israel Defense Forces (IDF) radio station also enjoys high popularity. There are also two commercial television networks and numerous regional radio stations. The majority of Israelis subscribe to cable or satellite television, and Internet access is widespread and not restricted by the government. Most print and electronic media operate their own websites, with readers actively and unabashedly expressing their political views through talkbacks or on private blogs. All newspapers are privately owned and also freely criticize government policy.



(www.freedomhouse.org)

This OSC product is based exclusively on the content and behavior of selected media and has not been coordinated with other US Government components.

2. Media Environment

2.1. Military Censorship Rarely Exercised

Freedom House says that press freedom is "generally respected in Israel," and its annual Global Press Freedom Survey for 2007 ranked Israel's degree of media freedom as first in the Middle East, and 61st worldwide with a rating of 29 (www.freedomhouse.org).

Israeli press is still governed by a military censorship agreement first imposed under the British Mandate in accordance with the 1945 Defense (Emergency) Regulations. This agreement -- signed in December 1949 by the government, the military, and the Editors Committee of Daily Newspapers -- gives the military censor wide-reaching discretionary authority to shut down a newspaper that publishes articles it considers harmful to national security. The censor is also empowered to fine a newspaper, to stop its printing, or to confiscate the newspaper's printing equipment if it is found in violation. Newspapers, radio stations, and Internet sites are closely monitored -- with representatives of the military censor physically present during the broadcasting of the main television newsreels -- and when necessary the military censors can telephone editorial desks to ban reports or even direct Internet sites to immediately remove items.

However, the powers granted to the military censor -- who is an army brigadier general belonging to the IDF Intelligence Branch and appointed by the defense minister -- are rarely exercised, and according to one chief censor: "In most cases censorship consists of the deletion of a word or a sentence at most" (*Ha'aretz*, 21 March).

In 1984, the military censor closed down the *Hadashot* daily newspaper for four days after the paper ran a photograph showing two Arab terrorists, who had just hijacked a bus, being led away by agents. The IDF spokesman had claimed that the two, who were really executed in cold blood by the Shin Bet, had died during the initial hostage rescue operation.

A 1989 ruling by Israel's Supreme Court imposed important limitations on the censor. The ruling stated that censorship may be exercised only when the publication of an item would clearly harm public safety. In such a case, the Editors Committee convenes to review pertinent classified information. The editors are asked to refrain from publishing any information until the censor gives the green light. When an item is censored, the newspaper may appeal the ruling to a "committee of three," composed of a member of the public (who serves as chairman), a representative of the army, and a representative of the press. The committee's decision is binding, and over the years, it has overruled the censor on a number of occasions (Yehi'el Limor and Rafi Mann: *The Press*). In extreme cases, the Israeli Supreme Court has also overruled the military censor.

On 10 January 1989, the Israeli Supreme Court ruled against the military censor, which had sought to prevent the *Ha'ir* weekly from publishing a report criticizing the functioning of the Mosad director at the time.

Yoram Peri, former chief editor of *Davar* and civil-military relations expert, recalls how in the early 1990's, the censor banned a *Ha'aretz* story about a jet crash. The IAF had been plagued by aviation accidents and simply wanted to avoid more bad press. In response, the newspaper

turned to the internal Censorship Committee, but the military beat the appeal. "In its defense, the censor claimed that the article gave away the order of battle," laughs Peri. "The enemy now knew that the IAF had one less plane!" (*The Jerusalem Post*, 7 November 2003).

On 31 December 2003, for the first time in almost three years, the censor took the rare step of convening a censorship committee. The committee ruled that the *Yedi'ot Aharonot* and *Ma'ariv* newspapers "severely violated" censorship law and endangered state security by publishing reports about the 1992 failed attempt by the IDF to assassinate then Iraqi President Saddam Husayn. The newspapers submitted their reports to the censor's office as required but did not make all the ordered deletions. The committee fined both newspapers thousands of shekels (1USD equals 3.477 shekels as of 29 July 2008) (*The Jerusalem Post*, 21 January 2004).

Over the years, Israeli journalists have found ways to circumvent the military censor, sometimes by quoting the foreign media, as in the case of Israel's alleged nuclear arsenal or, more recently, Israel's mysterious air strike in Syria in September 2007.

The rise of the Internet and ubiquity of cell phones has also weakened the censor, although one official with military censorship claims not to view the Internet as a "source of great danger" because it is difficult to sift out the relevant information from the "jumble of nonsense the enemy reads on the Web." Therefore, the Military Censor tries to focus its efforts on more "reliable media outlets" (*Ha'aretz*, 21 March; en.wikipedia.org/wiki/I).

2.2. New Journalism Bill

On 25 November 2007, the Ministerial Committee for Legislation approved a draft bill for a new journalism law that will replace the 1945 Defense (Emergency) Regulations.

The draft bill would mandate transparency regarding the identity of the publishers and shareholders (depending on the type of newspaper), in order to reduce conflicts of interest, as much as possible, between journalistic work, ethics, and the economic interests of shareholders.

The draft bill also would eliminate the requirement for newspapers to receive a license from the interior minister, while retaining certain legal restrictions. The authority to prohibit or limit the publication of a newspaper would instead be in the hands of the district court in the event of any threat to state security or public safety (*Yedi'ot Aharonot*, 26 November 2007).

2.3. Press Council

The Israeli press also is regulated by a Press Council, which is a voluntary body established in 1963. Like the Press Complaints Commission in the United Kingdom and the Federal Communications Commission in the United States, Israel's Press Council is charged with protecting press freedom, ensuring high ethical and professional standards, and facilitating public access to information. The Council, composed of journalists, publishers, press editors, and the public, also handles formal complaints on ethical matters and maintains an ethics tribunal which may try newspapers and journalists for violating ethical standards. If the newspaper is found guilty, it must issue an apology and publish the full text of the tribunal's ruling (Yehi'el Limor and Rafi Mann: *The Press*).

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2.4. *Ethnocentricity in Israeli Media*

The mainstream media, with the exception of left-leaning *Ha'aretz*, does not provide extensive reporting on political, social, economic, or cultural developments among minority communities in Israel: the Israeli Arabs, the large immigrant community from the former Soviet Union, Ethiopian immigrants, and foreign laborers. When it comes to these groups, the media, particularly the tabloid press, mainly report on crime or focus on human-interest stories, especially those with a lurid or tragic aspect.

A study, conducted by the Agenda Israeli Center for Strategic Communications between June 2006 and July 2006, notes that the Israeli Arab sector, which makes up 19 percent of the population, receive only 0.69 percent exposure in interview and news programs (not dramas and reality shows) in the Hebrew-language electronic media. Moreover, when shown, in most cases, Arabs appear in a threatening context. Arabs are mainly shown in items connected to the Israeli-Palestinian dispute and portrayed in the media as the enemy. Arabs are absent from items on subjects of economy, business, trade, and industry, and Arab experts rarely appear in the media. Agenda also found that most Israeli press, television, radio, and Internet media either do not employ Israeli Arabs at all or have only a token number of employees. The representation of Israeli Arabs in the media workforce stands at only 1 percent (*Ynet*, 21 October 2007; ice.co.il, 22 October 2007; *The Jerusalem Post*, 23 November 2007).

Data collected by the I'lam Media Center for Arab Palestinians in Israel shows that almost 60 percent of the Arab public does not feel that the Israeli media represents them. Forty-five percent of Israeli Arabs read newspapers over the weekend, while only 9.3 percent read newspapers during the week. The most popular newspapers are *Al-Sinarah* and *Kull al-Arab*. The Hebrew-language newspaper with the highest credibility among Israeli Arabs is *Ha'aretz*. As for radio listening patterns, a survey released in December 2007 by the Mutagim Polling Company shows that most Israeli Arabs prefer to listen to the Al-Shams regional radio station (46.5 percent), with the Voice of Israel in Arabic in second place (24.9 percent).

A survey conducted by the Pilat Institute, the Israeli branch of a global human resources company, had 81.7 percent of Israeli Arab respondents watching television daily, mostly with their entire family. The most popular television station among Israeli Arabs is Al-Jazirah (29.6 percent) followed by Channel 2 (11 percent), and then London's MBC with 10.2 percent, and finally Channel 1 with 7.9 percent (www.nrg.co.il, 21 December 2007).

On 24 November 2007, Channel 2's Qeshet franchise aired the first of 10 episodes of "Avoda Aravit" (Arab Work, a Hebrew term often used derogatively to mean shoddy workmanship), a "provocative bilingual dramedy centered on an Arab family," and claimed that 70,000 Israeli Arabs watched the program. *The Jerusalem Post* wrote that this is "the first series to hit Israeli prime-time commercial television whose main characters are all Israeli Arabs," and which may "revolutionize" how Israeli Arabs and Jews see each other (*The Jerusalem Post*, 23 November 2007).

2.5. *Stereotypical Portrayal of Immigrants*

In an article entitled "The Beauty, the Mafioso, and the Egghead," journalist Natasha Mozgovaya criticizes what she describes as the Israeli media's negative and stereotypical

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portrayal of Russian immigrants as either "gangsters, prostitutes, alcoholics," or "former professors who now work as street cleaners" as well as its "selective" coverage of issues relating to the Russian immigrant community (lib.cet.ac.il, October 2001).

Journalist Garama Asras writes that "while only isolated cases out of dozens and hundreds of cases of theft, rape, and robbery are reported by the media," "those stories that do get published either involve grave violence, salacious gossip, or a new immigrant from Ethiopia, an Arab, a Bedouin, or a Druze." Asras goes on to note that "in recent months, the media, particularly the press, have consistently reported on cruel events, while stressing that those involved are of Ethiopian origin, although this fact has no relevance to the case" (212.179.31.100/scoop/, 6 June 2006).

The following *Ha'aretz* headlines illustrate the media's slant on foreign workers: "Jailed Workers Released," "Illegal Workers May Pose Security Risks," "Illegal Workers Can Now Be Jailed," "Foreign Workers' Kids Dubbed 'Ticking Time Bomb'," and "Children of Illegal Workers Not Going To School."

The Jerusalem Center for Public Affairs wrote that "Israel -- or at least the Israeli media -- seems to have awakened to the presence of the large number of foreign workers now among us and the likely consequences of their presence," noting that "Thai workers are eating up Israel's wildlife and stray cats and dogs, workers of European origin frequently get drunk," and "undoubtedly both help support Israel's prostitution industry which also brings in foreign workers -- Russian non-Jews -- imported for the trade" (jcpa.org/).

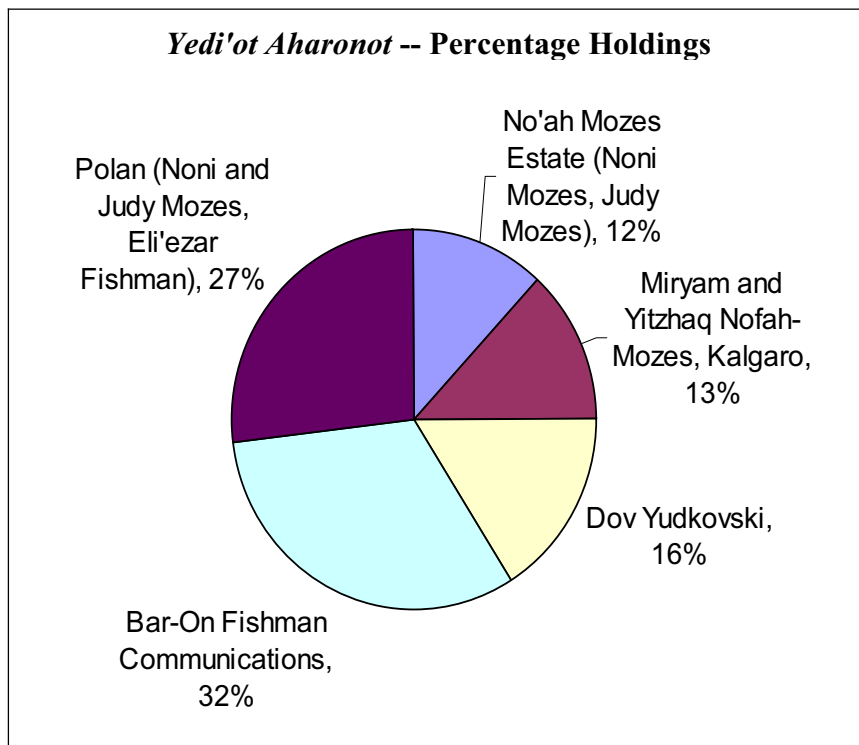
2.6. Journalists Maintain Close Relations With Politicians

Journalists in Israel are allowed unfettered access to Knesset members. They can approach any politician in the Knesset cafeteria, talk with them on a first name basis, and telephone them on their personal cellular phones and at home. Political correspondents and commentators can even call the prime minister at home, according to Rafi Mann, the editor of *Ma'ariv's* political supplement (Yehi'el Limor, Rafi Mann, *The Press*).

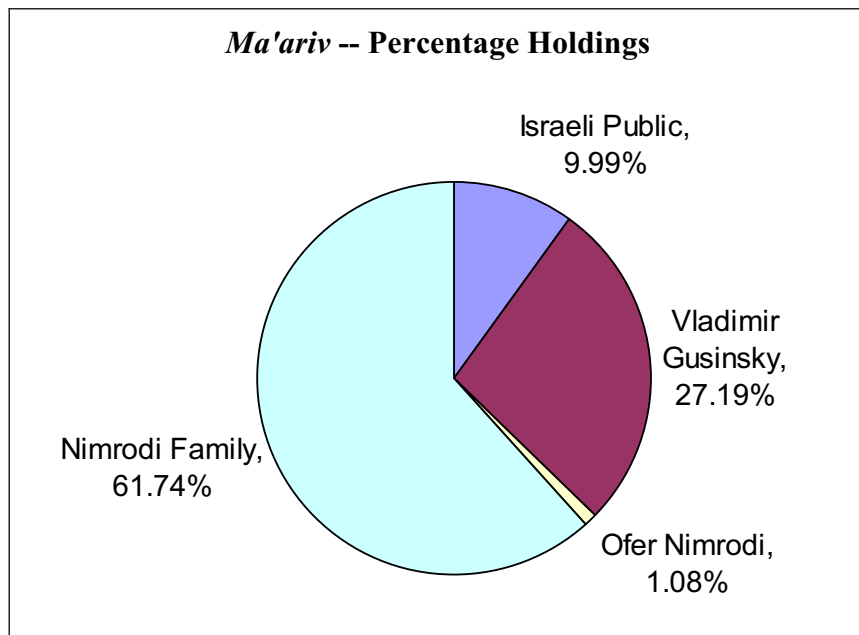
2.7. Family-Owned Conglomerates Dominate Media Industry

During the 1980's and 1990's, the Israeli press industry underwent a major upheaval and gradually came under the control of a limited number of conglomerates. Papers affiliated with organs of the once-dominant Labor Zionist movement disappeared and other publications became increasingly driven by commercial interests. Only the four smaller religious papers still remain attached to political parties.

Today, several of Israel's richest families own the three conglomerates that control Israel's mainstream papers and dominate the media industry, including commercial television. The Mozes and Fishman families own the Yedi'ot Aharonot Group which includes the largest circulation daily, *Yedi'ot Aharonot*, the country's most popular Internet site, *Ynet*, the two most popular women's magazines -- *Ha'isha* and *Olam Ha'isha* -- a weekly TV guide, and the dominant Vesti Group of Russian-language newspapers. Fishman and the Yedi'ot group also hold 31.3 percent of the HOT Telecommunications LTD cable network.



(Ha'aratz, September 2007)



(TASE, January 2008)

The Nimrodi family has controlling ownership of the Ma'ariv Group, which publishes the *Ma'ariv* daily, as well as a women's magazine, children's and youth weeklies, and a TV guide. The Nimrodís also have holdings in cable television and 24 percent of Channel 2's Telad concession. Their other business interests include insurance, hotels, shopping malls, and real estate.

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The Schocken family's Ha'aretz Group owns 75 percent of both *Ha'aretz* and the online business paper *TheMarker* and also publishes books and several Jerusalem and Tel Aviv weeklies.

Other significant players in the media sector include Shlomo Ben-Tzvi, who has focused his attention on the small pro-settlement market. He owns *Ma'ariv Rishon*, a right-of-center daily, a large share of another right-of-center weekly, *Hatzofe*, and a large share of television Channel 10.

In the past few years, more wealthy businessmen, including foreign billionaires, have purchased a stake in Israeli media outlets, but a relatively small number of individuals continue to control it.

2.8. Lack of Competition Criticized

The conglomerates' domination of the media has received its share of criticism.

Israeli radio legal commentator Moshe Negbi said the future looks "very bleak" for the Israeli media industry due to the lack of competition. Negbi claimed that by definition most of the damage goes unnoted because it involves what the papers do not print rather than what they do. "When the state censors something, you will at least know it's censored because you'll hear of an appeal to the High Court or the paper will leave a white space. When a paper censors itself, you will never know" (*The Jerusalem Post*, 2 August 2002).

Negbi went on to say that "the main threat to freedom of the press today is not from the authorities but from those with a financial stake in the press, especially the owners." He accused media moguls of manipulating press coverage to benefit their business interests. "It looks like we have pluralism in the opinion page, which is true politically. But, when was the last time anyone read an editorial demanding a pay raise for workers or supporting a workers strike? You won't find one because the people controlling the paper are giving salaries, not getting salaries" (*The Jerusalem Post*, 2 August 2002).

In July 2002, a media monopoly bill that would have forced any newspaper with a market share greater than 50 percent to split and prevented newspaper barons from investing in television channels and cable companies died in committee after intensive lobbying efforts by the three major newspapers swayed a slim majority of Knesset Members (MKs) to vote against it. Likud MK Yuval Steinitz, who proposed the bill, described the pressure that politicians and media figures are under from the families who control the media and the newspapers themselves.

"When I initiated the legislation I was called Don Quixote and was told there wouldn't be a single MK who would vote for it. Before the vote an MK came to me almost in tears saying: I can't vote for your bill with representatives of Mozes and Schocken sitting in the room."

Steinitz gave as an example of the intimidation the small amount of media coverage devoted to his monopoly bill. He says that the day after it passed its preliminary reading, *Ha'aretz* and *Yedi'ot Aharonot* completely ignored it. *Ma'ariv* gave it a tiny brief on the page where their mourning notices are published, and no one looks at that page" (*The Jerusalem Post*, 2 August 2002).

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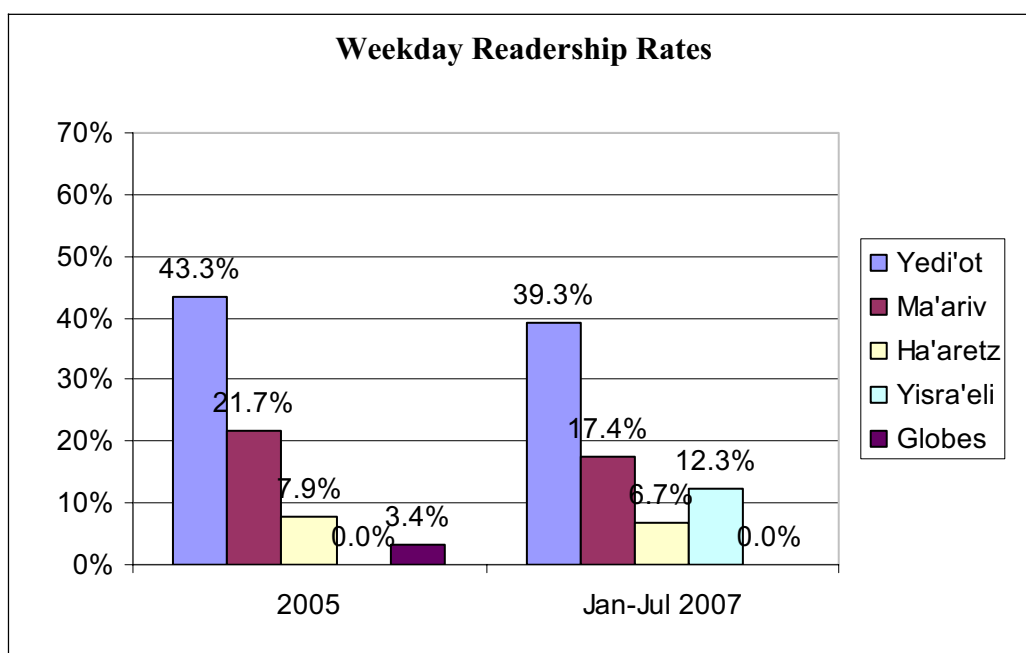
Steinitz also claimed that another result of the "lack of competition" in the media, is an "atmosphere of intimidation and fear" rife in the newsrooms. He says that journalists working for one media group are afraid to criticize one another, because they might need to switch jobs one day. This is true as well for employees of the noncommercial television stations, such as state-owned Channel 1 and Educational Television, who refrain from criticizing any of the commercial television stations because they "know that three families control almost the entire commercial market" (*The Jerusalem Post*, 2 August 2002).

3. Press



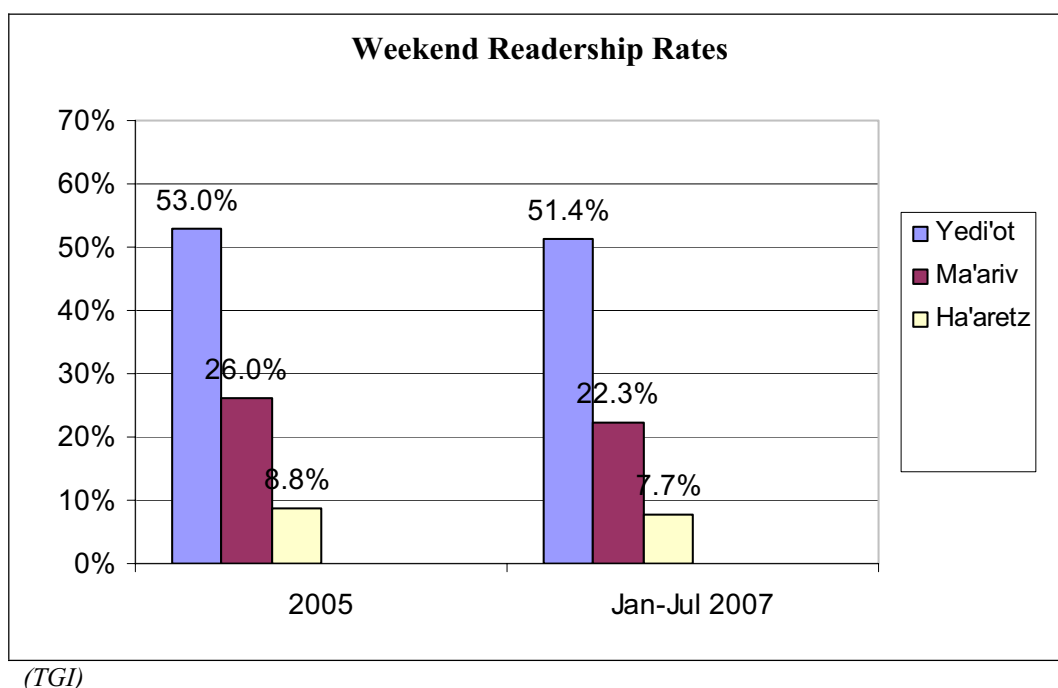
Israel has eight Hebrew- and two English-language national dailies, seven of which have Internet sites. In addition, since 2006 three new free dailies have entered into circulation. There are hundreds of regional and local Hebrew-language weeklies, most of which appear on Friday, while several weeklies are distributed to Jewish communities abroad.

3.1. Circulation



(TGI)

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3.2. *Print Newspapers Losing Ground to Internet*

Israeli newspapers do not release circulation figures, even to advertisers. The most authoritative guide to circulation statistics is a survey of 10,044 adult Israelis conducted by the TGI (Teleseker Gallup Israel) Company, a single-source consumer research database in Israel, twice a year. The survey for July 2007-June 2008 found that the years-long downward trend in overall newspaper readership is continuing. Since 2001, all the long-established Israeli newspapers have lost ground, with center-right *Ma'ariv* marking the steepest drop of 44 percent in readership, mass-circulation *Yedi'ot Aharonot* with a decline of 25 percent in readership, left-of-center *Ha'aretz* with a drop of 23 percent, and economic daily *Globes* with a loss of 9 percent in readership.

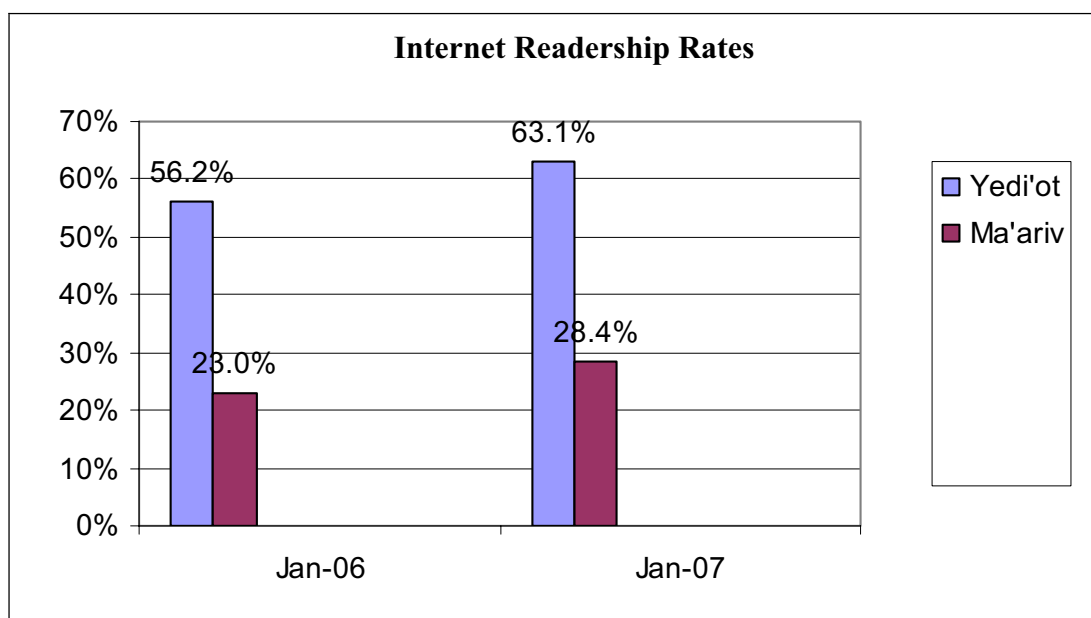
Yedi'ot Aharonot, an independent centrist paper, remains the most widely read daily in Israel. *Yedi'ot Aharonot* enjoys 36.9 percent of adult weekday readership with an estimated circulation of over 250,000 copies on weekdays, and 48.9 percent on Friday with a circulation of over 400,000 (www.globes.co.il, 28 July 2008).

The next highest readership is *Yisra'el Hayom*, a free newspaper launched in August 2007 by American billionaire Sheldon Adelson, with a weekday penetration rate of 17.4 percent (it does not appear on Fridays). Center right *Ma'ariv*, which has 15.8 percent adult weekday readership and 21 percent on Friday dropped in 2007-2008 to the third place (www.globes.co.il, 28 July 2008). *Ma'ariv* claims to publish 130,000 copies on weekdays and 200,000 on Fridays (*Ha'aretz*, 15, 26 July 2007.)

Ha'aretz, the left-of-center daily of record, is the fourth most widely read daily with 7.5 percent of weekday readership and 8.9 percent on Friday. *TheMarker*, which appears both as a daily economic supplement for *Ha'aretz* subscribers as well as a separate purchase, achieved a penetration rate of 7.7 percent in the first half of the year after becoming an independent

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publication in January 2008. According to an outside accounting firm, *Ha'aretz* prints an average of 73,000 copies on weekdays and 97,000 on Friday (*Ha'aretz*, 15 July 2007). On weekdays, the *Globes* financial daily is read by 2.8 percent of Israeli adults (www.globes.co.il, 29 July 2008).



(TGI)

Longtime media observers suggest that the decline in newspaper sales is attributable to growing Internet use, which has enabled people to read the papers without cost. Sales of hardcopy newspapers have decreased as use of the newspapers' own Internet sites has increased. A study carried out among 500 people making up a representative sample of the adult Israeli Jewish population who surf the Internet, by the Smith Consulting and Research Institute on behalf of the Netvision Institute for Internet Research, reported that "26 percent of Israeli Internet surfers use the web as their primary source for news. Television is the main source of news for 35 percent of the surfers, while the printed press serves as the major source of news for 23 percent of Internet surfers. The radio lags behind, with only 14 percent of Internet surfers using it as their main source of news (www.nana10.co.il/, 14 November 2006).

The weekly exposure of Internet surfers to *Yedi'ot Aharonot's Ynet* website at www.ynet.co.il rose to 63.1 percent in July 2007, while those at *Ma'ariv's NRG* site at www.nrg.co.il rose to 28.4 percent, and *Globes* site at www.globes.co.il reached 14 percent, according to a TNS Internet Measurement (TIM) survey conducted in July 2007.

All Hebrew- and English-language dailies are published Sunday through Friday, except *Globes*, which appears Monday through Friday

Israel also has an extensive local weekly press. According to an assessment by Professor Yehi'el Limor, the head of the Communications Department at Ari'el University, and veteran journalist Rafi Mann, by the mid-1990's the number of local weeklies had grown to around 700. Most towns and large neighborhoods maintain at least one local paper. They do not all appear in the same format, however. Some offer their readers a 150-180-page paper with numerous articles, reports, and columns, while others are no more than a thin pamphlet.

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Fourteen of the large local papers belong to the Ha'aretz Group, and 17 to the Yedi'ot Aharonot Group (Yehi'el Limor, Rafi Mann: *The Press*, 1997).

3.3. Characteristics of Israeli Press Reporting

The local weeklies brought a new style to the Israeli press, including shorter, punchier writing and large colorful headlines. The changes are primarily due to the generational and socioeconomic turnover in the newspapers' staffs, as the more ideologically driven East European-born journalists, who were generally associated with the Labor Zionist movement and responsible for the country's early press, have been replaced by Israeli-born journalists of both genders with varied social backgrounds. This has led to a significant reduction in space devoted to op-ed pieces, an increase in the publication of human interest stories, and a reduction in long reports and articles to make room for eye-catching headlines. Departing from their traditional literary style, journalists also have begun integrating elements of colloquial Hebrew and even slang into their writing. The Knesset's Education Committee has even convened to discuss the "degeneration of the Hebrew language" with participants noting that the "print media, including the *Ha'aretz* newspaper, are full of spelling mistakes" and decrying radio announcers' use of slang (www.knesset.gov.il, 7 January).

In addition, this new generation of journalists has introduced changes in the way stories are treated and how sourcing is used.

Newspaper headlines are often about future events rather than past events while news stories have a short life span in Israel due to the fast pace of important political and security developments. There are few follow-up stories, and even a major news item rarely lasts more than two days. In addition, the Israeli media provides little sourcing on stories and rarely carries background material.

3.4. Press Reflects Broad Spectrum of Public Opinion

The mainstream Israeli press, like the Israeli public, is divided between right and left according to a paper's position on the Israeli-Palestinian conflict, whether it supports or opposes holding on to the occupied Palestinian territories, as well as its views on peace and security. Right-wing papers like *The Jerusalem Post*, *Maqor Rishon*, and *Hatzofe* support holding on to the territories and adopt a tough line on the peace process and security issues. *Yedi'ot Aharonot* and *Ma'ariv* do not carry editorials, but *Ma'ariv* is considered to be center-right as most of the commentaries it carries belong to that side of the political spectrum. *Yedi'ot Aharonot* is considered centrist as it carries comment that reflects opinion to both the left and right of center. *Ha'aretz* is a left-wing daily, opposing holding on to the territories and consistently supporting peace initiatives.

The opinion columns in *Yedi'ot Aharonot* and *Ma'ariv* are usually written by guest writers, including political figures, authors, and activists while *Ha'aretz* has regular commentators. *Ha'aretz* also carries a daily editorial, the subject of which is determined by a majority vote at the daily senior editorial staff meetings.

3.5. *Yedi'ot Aharonot*



*Publisher Arnon Mozes
(Walla.co.il, 6 March 2006)*

- Source Descriptor: independent, centrist, largest circulation
- Publisher: Arnon Mozes; Editor in Chief: Moshe Vardi
- Circulation: readership 36.9 percent on weekdays and 48.9 percent on Fridays; Published: Sunday to Friday
- Address: 138 Petah Tiqva Rd, Tel Aviv; Telephone: 972-3-6972222

Key journalists: Shim'on Schiffer and Nahum Barne'a, who won the Israel Prize for journalism in 2007, leading political correspondents and commentators; Alex Fishman, military commentator; Roni Shaged, Palestinian affairs correspondent, close to Shin Bet security service; Itamar Eichner and Sima Qadmon, political parties correspondents; Sever Plotzker, economic editor; Smadar Peri, Arab world correspondent.

Yedi'ot Aharonot was founded in 1939 and is the major component of the Mozes media conglomerate. The paper promotes itself as the "nation's newspaper" and is read by over half of all Hebrew-language newspaper readers (Yehi'el Limor and Rafi Mann, *The Press*). The Friday edition sells more than the other Hebrew-language newspapers combined (TGI). It offers readers a wide range of perspectives on the peace process as well as international, domestic, and military issues. The newspaper does not carry editorials. Publisher Arnon Mozes is very active in the content management and business aspects of the paper, according to sources at the newspaper.

The extensive holdings by the paper's owners, the Mozes and Fishman families, led Israel's antitrust commissioner Dror Strum in 1996 and again in 1999 to declare the newspaper a monopoly. Strum testified in a parliamentary committee on 18 November 2003 that *Yedi'ot Aharonot* uses its economic power to influence newspaper vendors to inflate sales of the paper either by removing other newspapers from the shelves or by making sure that *Yedi'ot Aharonot* always appears on top. It also lures customers through special deals that undercut competitors (Yisra'el Meidad and Eli Pollak: *Legislating a Free Press*). Professor Gabi Weiman, a Haifa University media expert, says *Yedi'ot Aharonot* was able to dominate the market because of Israel's small size and because Israeli lawmakers did not foresee the monopoly problem in time. "After *Yedi'ot* reaches a certain size, it doesn't matter if there are better-quality papers. If that's what everyone in your workplace and your family is reading, that is what you will want to read as well" (*The Jerusalem Post*, 2 August 2002).

On 1 January 2008, *Yedi'ot Aharonot* began distributing a free newspaper called *24 Daqot*. This followed numerous reports in the latter part of 2007 regarding concern at *Yedi'ot Aharonot* that the recent phenomenon of free newspapers distributed at transportation hubs, especially the deep-pocketed Sheldon Adelson's *Yisra'el Hayom*, may threaten its market share.

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TGI's survey for July 2007-June 2008 indeed indicated that *Yisra'el Hayom* had achieved a penetration rate of 17.4 percent "at the expense of other newspapers."

The Seventh Eye, a respected bimonthly on media issues, noted that "statistics show that in the era of the Internet and the cellular phone, free dailies have a young and accessible readership, which is gradually turning it into a magnet for advertisers," and "*Yedi'ot Aharonot* is aware" that they are "likely to deal a painful blow to the print media, which has been suffering from a decline in circulation" (*The Seventh Eye*, September 2007).

The Seventh Eye goes on to note that "by coincidence or not," *Yedi'ot Aharonot* appointed a new editor in chief, Shilo De-Beer, because its owner "Noni Mozes is probably hoping that with De Beer at the helm, he will be able to compete with *Yisra'el Hayom* and the other free newspapers." Another move by the paper has been to shift the opinion pages from its daily supplement, *24 Hours*, to the news pages.

The Seventh Eye reports that concern at *Yedi'ot Aharonot* about losing market share also has been driving recent marketing efforts, including unprecedented offers at shopping malls, gas stations and marketing chains, where the paper is handed out free of charge to those who spend a particular sum on products. In addition, at some railroad stations where free newspapers are distributed, *Yedi'ot Aharonot* is being sold for a fifth of its normal price.

On 18 February 2008, The Yedi'ot Group began publishing a daily economic newspaper, *Kalkalist*, headed by Yo'el Esteron, the former deputy editor of *Yedi'ot Aharonot*, and Galit Hami, its former economics editor. The paper's website, www.calcalist.co.il, is still under construction.

Kalkalist has the stated aim of providing a broad range of economic reporting in "clear language that will address both professionals as well as laymen who, until now, have refrained from reading the economic press" (*Ynet*, 4 January).

Yedi'ot Aharonot's website, *Ynet*, has Hebrew (www.ynet.co.il) and English (www.ynetnews.com) versions, which operate independently of the newspaper. It has its own reporters and editors but does reprint some reports, analyses, and commentaries from the paper. It carries news flashes and frequent news updates.

3.6. *Ma'ariv*



Publisher Ofer Nimrodi
(*Ha'aretz*, 3 June 2007)

- Source Descriptor: independent, second-largest circulation center right
- Publisher: Ofer Nimrodi; Editor in Chief: Doron Glazer, Ruti Yovel
- Circulation: Readership 15.8 percent (claims to publish 136,000 copies) on weekdays and 21 percent (236,000 copies) on Fridays; Published: Sunday to Friday
- Address: 2 Carlebach St, Tel Aviv; Telephone: 972-3-5632111

Key journalists: Ruti Yovel and Doron Glazer, editors in chief; Ben Kaspi, political correspondent and commentator with good ties to the Prime Minister's Office; Il'il Shahar, political correspondent; Amit Kohen and Amir Rappaport, military correspondents.

Founded in 1948 by disgruntled *Yedi'ot Aharonot* journalists, *Ma'ariv* was purchased in 1991 by Ya'akov Nimrodi from the estate of the late Robert Maxwell, who owned the paper through his family-owned Hakhsharat Hayishuv corporate conglomerate. In 1998, Russian media mogul Vladimir Gusinskiy bought 27 percent of the paper. A shakeup of the paper's leadership occurred in 2002 when Nimrodi's son, Ofer, was forced to temporarily resign as chairman of the board after he was convicted of wiretapping the telephones of the rival Mozes family. Ya'akov Nimrodi was then convicted of bribing witnesses in an attempt to have his son exonerated. This prompted calls by MKs for legislation barring convicted felons from owning and/or running newspapers and other news media. Former Editor in Chief Amnon Dankner's decision to use the paper to support Nimrodi and attack the police and State Attorney's Office was sharply criticized by other media.

Ma'ariv, which was for many years Israel's leading newspaper, lost ground in the 1980's to *Yedi'ot Aharonot*. Since being acquired by Nimrodi, the newspaper's strategy has been to emulate the style of *Yedi'ot Aharonot*. The paper adopted a tabloid format with more pictures and large colorful banner headlines, shorter easy-to-read reports and articles, and more populist right-of-center commentaries on the Israeli-Palestinian conflict on its op-ed page. The newspaper also dropped its daily editorial in early 2003 because the senior editorial staff could not agree on the paper's policies, according to sources at *Ma'ariv*.

According to the same sources, owner and publisher Ofer Nimrodi takes a very active part in deciding the paper's editorial tone and exercises tight control over staff appointments and promotions, financial outlays, and business activities.

Apparently disappointed by *Ma'ariv*'s "declining status in recent years," Ofer Nimrodi made two unsuccessful attempts at the end of 2006 to sell the newspaper. *Ma'ariv* was also rocked by the resignation of two deputy CEO's and the editor of *Ma'ariv*'s NRG website, as well as the defection of some of its leading journalists, such as Amos Regev and Dan Margalit, to *Yisra'el Hayom* (*Ha'aretz*, 15 July 2007).

On 11 October 2007, *Ma'ariv*'s board of directors approved the appointment of Doron Glazer and Ruti Yovel as the paper's new joint editors in chief, replacing Amnon Dankner. They are also in charge of the paper's NRG website, its weekly magazines, and the *Ma'ariv* group's publishing house. Glazer and Yovel are veteran editors with a great deal of experience in the print and broadcast media. Glazer was once the spokesman of left-wing movements such as Moqed and Sheli, and over the years, both he and Yovel continued to espouse left-wing views. Glazer managed *Ha'aretz*'s chain of weekly magazines and later served as deputy editor in chief of *Yedi'ot Aharonot*. During the five years prior to his appointment as joint editor in chief of *Ma'ariv*, he served as editor in chief of Channel 2's "Uvda" program. Yovel also has edited *Ha'aretz* and *Yedi'ot Aharonot* weekly magazines and, for the past two years, has been the chief editor of Channel 2 Television's highly popular Friday evening newsreel.

Ha'aretz opined that their appointment heralds a substantial change in *Ma'ariv's* editorial line because former Editor in Chief Amnon Dankner used the paper to attack the Israeli legal system, particularly the state prosecution and Supreme Court, and to defend his close friends, including Prime Minister Ehud Olmert, to the point of allegedly rewriting news items. Glazer and Yovel, on the other hand, hold opposite views (*Ha'aretz*, 11 October 2007).

Media insiders speculate that Glazer and Yovel have demanded that their contract guarantee complete journalistic freedom against any pressure from the shareholders, as well as "golden parachutes" in the event of their dismissal or forced resignation. Sources close to the two insisted that Nimrodi has "drawn the appropriate conclusions" from Dankner's tenure and will no longer interfere in the running of the newspaper, realizing that the new editors may be the only ones capable of saving his newspaper, which according to a TGI survey from June 2007 has dropped to less than 18 percent exposure on weekdays, 23 percent on weekends, (*Ha'ir*, 12 October 2007) and sustained operating losses of 45 million shekels in the first nine months of 2007 (*Ha'aretz*, 2 January).

Ma'ariv's print edition can be read online, by subscription only, at the paper's website at (www.nrg.co.il), which according to a TIM survey conducted between September 2006 and August 2007 is visited by over 100,000 Internet users daily and features unique material as well as constantly updated news (*Ha'aretz*, 9 September 2007).

3.7. *Ha'aretz*



Publisher Amos Schocken
(walla.co.il, 13 August 2006)

- Source Descriptor: left-of-center, independent daily-of-record
- Publisher/owner: Amos Schocken; Editor in Chief: Dov Alfon
- Circulation: Readership 7.5 percent on weekdays (73,000 copies) and 8.9 percent (97,000 copies) on Fridays; Published: Sunday to Friday
- Address: 21 Schocken St, Tel Aviv; Telephone: 972 -3-5121212

Key journalists: Aluf Ben, political correspondent; Yosi Verter, political parties correspondent; Avi Issacharoff, Amos Har'el, Yo'av Stern, Palestinian affairs correspondents; Shmu'el Rosner, chief US correspondent; Gid'on Levi, Israeli-Palestinian affairs commentator; Nadav Shragay, settler affairs correspondent.

Op-Ed writers: Uzi Benziman and Yo'el Marcus, political commentators; Aqiva Eldar, political writer; Amir Oren, defense and intelligence commentator.

Ha'aretz was founded in 1919 by a group of socialist-oriented Zionist immigrants, mainly from Russia. The Schocken family, who bought the paper in 1935, now own 75 percent of the newspaper, after having sold 25 percent to German publisher Dumont Shaugberg in August

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2006. It is Israel's oldest daily, enjoying a reputation for quality reporting. *Ha'aretz* identifies itself as an elitist newspaper. While discussing the paper's editorial policy, former Deputy Editor in Chief Yo'el Esteron said: "I think we are more similar to foreign newspapers, such as *The New York Times*, than *Yedi'ot Aharonot* and *Ma'ariv*" (Voice of Israel, 9 May 2000).

The editorial line is secular, strongly anti-trade union, dovish on foreign policy and security issues, and generally sympathetic to US policy. While in favor of free-market policies, it is also supportive of the weaker groups in Israeli society, featuring numerous articles over the years about the plight of foreign laborers, the exploitation of sex workers, and discrimination against Israeli Arabs and immigrants from the Commonwealth of Independent States and Ethiopia.

As with other elitist papers, its influence is much greater than its circulation suggests. "*Ha'aretz* is viewed as a media channel that is both produced and consumed by the highly educated and affluent Ashkenazim" (Sectorial Media in Israel, Tel Aviv University's Hayim Herzog Institute for Media, Society, and Politics, March 2005). It is read by policymakers, the business community, and intellectuals, and its English-language edition is read by the diplomatic corps.

More than other Israeli newspapers, it presents the Palestinian viewpoint, especially in pieces by Gid'on Levi and Amira Hass, who have won international recognition for their articles. The paper moved, however, closer to the center in the last three years of former Editor in Chief Hanokh Marmari's 16-year tenure. Marmari resigned as editor in chief on 15 April 2004 because he claimed the publisher undermined his editorial control. He was replaced by David Landau, editor of *Ha'aretz*'s English edition (*Ha'aretz*, 16 April 2004), who maintained its left-of-center line.

Landau, 56, was born in London and immigrated to Israel in 1970. In 1990, he led the mass resignation of some 30 senior journalists at *The Jerusalem Post* following its sale to Hollinger International and the subsequent shift to the right.

In February 2008 it was reported that Dov Alfon has been named as the new editor in chief of *Ha'aretz* newspaper. Alfon is expected to take up his new role on 15 April. He will replace David Landau, who is completing a four-year term in the post (www.haaretz.com, 13 February 2008).

As of publication date, no further information on this personnel change is available.

Ha'aretz's broadsheet format allows it to get on a single news page twice as much material as *Yedi'ot Aharonot* and *Ma'ariv*. Its pride used to be its op-ed page, but in 2005, it reduced this section and expanded its economic/business (*TheMarker* Supplement), arts and leisure, and sports sections to attract business people and younger readers. In the first two years after the launch of *TheMarker*, subscriptions reportedly grew more than 15 percent and advertising revenue rose by more than 50 percent (*Ha'aretz*, 14 May 2007). In May 2007, *TheMarker* founder and Editor in Chief Gay Rolnik, 38, was appointed deputy publisher of the entire *Ha'aretz* group, and on 1 January 2008, *TheMarker* began appearing as an independent daily newspaper.

An outside check of subscriptions and distribution conducted for the newspaper by the Somekh Haikin (KPMG) accounting firm estimates *Ha'aretz's* total print runs at an average of 73,000 copies on weekdays and 97,000 for the Friday weekend edition. Most of its readers are regular subscribers; newsstand sales account for a relatively small proportion of sales. *Ha'aretz* also reported an 8.8 percent rise in the number of its paid subscribers in 2007 as compared with 2006, bringing their number to 65,000. *Ha'aretz* has a journalistic staff of some 330 reporters, writers, and editors (*Ha'aretz*, 20, 24 January).

Ha'aretz has websites in both Hebrew (www.haaretz.co.il) and English (www.haaretz.com). Both sites carry online print editions as well as news updates.

3.8. *The Jerusalem Post*



Publisher Eli Azur
(www.ice.co.il, 5 August 2007)

- Source Descriptor: right-of-center, English-language independent
- Publisher and CEO: Eli Azur; Editor in Chief: David Horovitz
- Circulation: estimated 40,000 mid-week, 55,000 Fridays (figures provided by *The Jerusalem Post*); Published: Sunday to Friday
- Address: PO Box 81, Jerusalem 91000; Telephone: 972-2-5315666

Key journalists: Herb Keinon, political affairs correspondent, close to the prime minister's media adviser; Ya'akov Katz, military affairs correspondent; Gil Hoffman, political parties' correspondent; Matthew Wagner, settlements correspondent; Khalid Abu-Tu'amah, Palestinian affairs correspondent.

The Jerusalem Post, founded in 1932, supported the Labor Party for years but took a right-wing, pro-religious, and nationalist turn when it was bought by Canadian newspaper magnate Conrad Black's Hollinger Group in 1989. In the wake of the ownership change, many of the paper's most important editors and correspondents resigned over what they claimed was heavy-handed editorial intervention by the new publishers. The paper's orientation on the peace process and national security issues turned to the right, and it began advocating holding on to all Palestinian territories occupied in the 1967 war. It also opposed many of the US and Israeli peace initiatives with the Palestinians and Syrians. The newspaper was sold to Israeli businessman Eli Azur in 2004, which has resulted in a softening of its hard-line editorials.

While the paper describes itself as "politically independent" and its reporting does not generally reflect a clear political agenda, the paper's regular columnists offer a largely right-wing viewpoint. They include staunch security hawks, such as Deputy Managing Editors Caroline Glick and Michael Freund. The commentaries and analyses by academics, political figures, and others also largely reflect the views of Israel's right-wing.

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Like all mainstream Israeli dailies, *The Jerusalem Post* is a staunch supporter of free market policies. On issues of religion and state, although sympathetic to demands that the Orthodox establishment loosen its hold over religious and secular life, it remains keenly aware of religious sensitivities as many of its readers are religious. It carries articles on Jewish religious observance and holidays.

The Jerusalem Post is widely read by the diplomatic community and other English-speaking readers, especially settlers in the West Bank and Gaza, many of whom hail from the United States. It has a weekly international edition with an estimated 60,000 readers, mostly in the United States and Canada.

The Jerusalem Post, on 2 January 2008, began to print, distribute, and market copies of the *Wall Street Journal Europe* in Israel, both to individual and corporate subscribers, and via retail outlets.

The Jerusalem Post claims to be "the top-selling English daily in Israel," and says that "its Web site, www.jpost.com, which claims 2.5 million unique visitors per month, is the most-read English-language Israeli news Web site" (*The Jerusalem Post*, 20 November 2007). The website carries most of the articles that appear in the newspaper, but they are not always identical to the printed version. It also carries news updates, often from international news agencies. The paper's print edition, RSS feeds, narrations of articles, and instant machine translation into 10 languages are also available by subscription.

The Jerusalem Post also publishes a weekly French edition in Israel, with a readership of 15,000, and a monthly Christian edition, "tailored specifically to Christians who care deeply about the well-being of Israel and the Jewish people," with a circulation of 30,000 (figures provided by *The Jerusalem Post*).

3.9. *Globes*



Editor in Chief Hagay Golan
(www.walla.co.il, 1 January 2006)

- Source Descriptor: independent daily focusing on business and financial news
- Publisher: Globes Group; Editor in Chief: Hagay Golan
- Circulation: Readership 3.3 percent; Published: Monday to Friday
- Address: 53 Etzel Street, Rishon Leziyyon; Telephone: 972-3-9538787

Key journalists: Ze'ev Klein, Amir Keidan, and Shira Horesh.

Founded in 1983, *Globes* is influential within the financial and business community. It is fashioned after London's *The Financial Times* and is even printed on pink paper. It is published in the late afternoon and distributed to subscribers' homes or offices in the evening.

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Globes reports mainly on business and financial news both in Israel and abroad but also carries some general news. Newsstand sales account for only a small percentage of circulation. The primary owner is Eli'ezer Fishman (66 percent), who also has a 32 percent stake in *Yedi'ot Aharonot* (Tel Aviv Stock Exchange).

Globes maintains a Hebrew-language (www.globes.co.il) website with news updates and articles and also offers the print edition online by subscription. *Globes* maintains an English-language website (globes-online.com), which carries translations of some of the Hebrew version's material. The English-language version is available to anybody while the Hebrew-language site requires free registration. Both sites carry primarily economic and financial news, commentary, and analysis, as well as limited political news and commentary.

3.10. *Maqor Rishon*



Publisher Shlomo Ben-Tzvi
(www.walla.co.il, 17 February 2006)

- Source Descriptor: daily, right-of-center newspaper;
Publisher: Shlomo Ben-Tzvi
- Editor in Chief: Amnon Lord
- Circulation: newspaper claims 40,000 on weekdays;
Published: Sunday to Friday
- Address: Bet Qalqa, Derekh Menahem Begin 116,
Tel Aviv; Telephone: 972-3-6277700

Key journalists: Hagay Huberman, Gil'ad Katz, and Sofia Ron-Moriya, political affairs; Eran Bar-Tal, economic affairs.

Key commentators: Amnon Lord, Hagay Huberman, Me'ir Uzi'el, and Caroline Glick.

Maqor Rishon was founded in 1997 by Shmu'el Tal, rabbi of the Neve Deqalim settlement in the Gaza Strip, as Israel's most right-wing daily and "as an appropriate right-wing response to the hostile media" (*Ma'ariv*, 8 July 2002). The paper's limited appeal, serving the very narrow far-right-wing market, led to huge losses and ultimately to its closure in October 1999. Mikha'el Karish, a US immigrant who settled in the West Bank settlement of Qedumim, reopened the paper soon thereafter "to market Zionism" (*Ma'ariv*, 8 July 2002). In mid-2003, businessman Shlomo Ben-Tzvi added the paper to his media holdings.

The daily describes itself as the "right-wing alternative" to the three main dailies and now also includes *Hatzofe*, a 70-year-old newspaper affiliated with the National Religious Party and also owned by Hirsch media, as a weekly supplement. Both the daily and the weekly supplement share many of the same columnists and reporters. *Maqor Rishon*'s weekday editions are approximately 24 pages long, while the larger Friday and holiday editions are expanded to include political, economic, and cultural supplements.

The newspaper carries only right-wing views which support Jewish moral values and the Jewish people's right to the entire land of Israel, including all the Palestinian territories. News

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and opinion on Israel's domestic and foreign policies make up most of the newspaper's content; there are also daily sections on economics, culture, and sport, as well as political gossip, health, and science.

Maqor Rishon's Internet site at www.makor1.co.il says that it "cooperates with the printed edition's editors and journalists" and carries "some" of the daily's reports and commentaries, with other material being unique to the website. The website also has announced plans to add digital content such as blogs and video clips. *Maqor Rishon* sources say the newspaper sells 40,000 copies a day, 32,000 of which are sent to subscribers. Its weekly readership is 4.1 percent of Hebrew newspaper readers, according to TGI's January-December 2006 survey.

3.11. *Hatzofe*



- Source Descriptor: right-of-center, National Religious Party (NRP)-affiliated; Publisher: Shlomo Ben-Tzvi
- Editor in Chief: Shlomo Ben-Tzvi, Limor Grizim-Magen
- Circulation: distributed together with *Maqor Rishon* on Fridays
- Address: 116 Derekh Menahem Begin, Tel Aviv; Telephone: 972-3-5622951

Key journalists: Hagay Huberman, well-informed about settlement affairs; Tuli Firkash, political affairs.

Almost 70 years after its initial publication, *Hatzofe* ceased appearing as a daily newspaper on 25 April 2007 and now appears as a weekly insert distributed inside *Maqor Rishon* on Fridays. *Hatzofe* employees complained at the time that Shlomo Ben-Tzvi, who owns both *Hatzofe* and *Maqor Rishon*, wanted to publish a "completely secular newspaper, but with a nationalist slant." Sources at *Maqor Rishon*, on the other hand, expressed concern that *Hatzofe* would "swallow *Maqor Rishon*" and that "religion would set the tone" (www.inn.co.il, 2 May 2007).

The paper offers extensive coverage of religious issues and settlement affairs. Like the ultra-Orthodox newspapers, it makes no pretense of providing the normal range of services of a daily newspaper and serves primarily as a spokesman for the National Religious Party's political and religious leadership. It serves as an advocate for the rights of Israeli settlers in the West Bank, which it considers part of the historical land of Israel.

The newspaper has taken a sharply anti-Olmert editorial position because of his call for territorial compromise and the uprooting of settlements. It also rejects the right of the United States to intervene in Israeli affairs.

Hatzofe also has a Hebrew-language website (www.hazofe.co.il), which features many of the articles that appear in the weekly print edition.

3.12. *The Jerusalem Report*



- Source Descriptor: independent English-language biweekly magazine covering Israel, the Middle East, and the Jewish world
- Publisher: Eli Azur; Editor in Chief: Eeta Prince-Gibson
- Circulation: 55,000 with 90 percent sold in United States
- Address: PO Box 1805, Jerusalem; Telephone: 972-3-5315440

Key Journalists: David Horovitz, who also is the editor in chief; Ehud Ya'ari; Leslie Susser; Netty C. Gross; Isabel Kershner.

The Jerusalem Report covers Israeli political, social, and economic affairs, as well as the Jewish Diaspora in feature-length articles directed mainly at foreign readers who want an overview of local, regional, and international developments. *The Jerusalem Report's* masthead describes it as "an editorially independent biweekly newsmagazine that offers original journalism from Israel, the Middle East, and the Jewish world" and that "honestly" assesses "Israel's relations with its Arab neighbors." The format is similar to that of many US weekly magazines. It was founded in 1990 by former *Jerusalem Post* journalists who departed after Conrad Black's purchase of the daily. Black's Hollinger Group also bought *The Jerusalem Report* in 1999 and its editorial line moved from center-left to centrist. In 2004, it became part of the media empire of Israeli businessman Eli Azur, who also owns *The Jerusalem Post*. Its website, which mostly provides extracts of the magazine's articles, can be accessed through *The Jerusalem Post's* website at www.jpost.com.

3.13. Free Newspapers

3.13.1. 24 Daqot



- Publisher: Yedi'ot Internet
- Editor: Eran Tippenbron
- Telephone: 036082467; Fax: 03-6953950
- E-mail: 24dakot@yedioth.co.il

Yedi'ot Aharonot group distributed the first edition of its own free daily newspaper, called *24 Daqot*, on 1 January 2008 near train stations in Tel Aviv, Haifa, and Beersheba. The latest in a series of Israeli freebies, *24 Daqot* has 32 color pages and is mainly devoted to entertainment, gossip, sports, and fashion, with a light smattering of news. *24 Daqot* says that it is being offered for free as part of an "introductory campaign" and, in the future, will cost 2 shekels. Its editor is Eran Tippenburen, a former news desk editor at *Yedi'ot Aharonot*. According to the latest TGI survey for July 2007-June 2008, *24 Daqot* achieved a penetration rate of 5 percent in the first six months of 2008 (www.globes.co.il, 28 July 2008).

3.13.2. Yisra'el Hayom



Editor in Chief Amos Regev (www.scoop.co.il, 13 December 2007)

- Publisher: Asher Baharav; Editor in Chief: Amos Regev
- Circulation: Approximately 255,000 copies; Published: Sunday to Thursday
- Address: Derekh Hashalom 2, Tel Aviv, Telephone: 972-54-4000100

Yisra'el Hayom, which Editor in Chief Amos Regev described in the first edition as "not a 'freebie' handed out at public transportation hubs but a serious newspaper," began appearing on 30 July 2007. Its owner, US billionaire Sheldon Adelson, has shown a willingness to pay higher than average salaries to attract leading Israeli journalists to work at the newspaper.

Key journalists: Dan Margalit, Hemi Shalev, political commentators; Shlomo Tzezana, political affairs; Ya'aqov Amidror, military correspondent.

In the 32-page tabloid's opening editorial, Regev wrote that "not all opinions are given appropriate expression" and that "the Israeli public deserves a better press, a 'different kind of journalism'."

Ha'aretz has criticized *Yisra'el Hayom* for being "a newspaper with an agenda" noting that it has a "tone of sharp criticism of Olmert and that " Opposition leader MK Benjamin Netanyahu (Likud) is a crony of *Yisra'el Hayom*'s proprietor Adelson and also a close friend of editor Amos Regev."

Ha'aretz correspondent Asaf Carmel writes that "the inevitable question concerns whether and to what extent the newspaper will be harnessed to serve Netanyahu in his efforts to depose Olmert and re-conquer the premiership" (*Ha'aretz*, 31 July 2007).

The aforementioned *Ha'aretz* report quotes an unnamed source as saying that "there is no question about it, Bibi (Netanyahu) was involved up to his neck in the process of establishing the new newspaper." The sources goes on to claim that "he applied a lot of pressure on Adelson to buy *Ma'ariv*, but from the moment the purchase of *Ma'ariv* didn't work out, Bibi adjusted himself to the alternative plan of establishing *Yisra'el Hayom*, and he is very enthusiastic about it. He says that the difference between Noni Mozes (Arnon Mozes, the publisher of *Yedi'ot Aharonot*) and Adelson is that Mozes wants to influence the paper and make a profit at the same time, while Adelson just wants to influence the public with his newspaper" (*Ha'aretz*, 31 July 2007).

Ha'aretz also reports that after *Yisra'el Hayom*'s correspondent Shlomo Tzezena asked the prime minister's bureau whether US President George Bush's January visit was timed to divert the public's attention from the publication of the Winograd Commission's report on the failures of the second Lebanon war, Olmert's aides replied that "they have absolutely no expectations" from this newspaper, "which can go on publishing nonsense and lies." *Ha'aretz* notes that "since its initial publication four months ago, the paper's editorial line has been hostile to Olmert. This line is promoted by Dan Margalit, the paper's chief correspondent and a former friend of the prime minister who over the past year has become one of his harshest critics" (*Ha'aretz*, 21 December 2007).

Despite *Ha'aretz*'s criticism of *Yisra'el Hayom*, the Schocken publishing house will reportedly help distribute Adelson's paper, in exchange for a fee, as part of *Ha'aretz*'s competition against *Yedi'ot Aharonot*. *Ha'aretz* prints approximately 225,000 copies of *Yisra'el Hayom* daily, and (*The Jerusalem Post*'s) Eli Azur's publishing plant prints another 25,000 copies. The tabloid features news, 2 pages of op-ed, culture news, an economic page (in cooperation with *Ha'aretz*'s *TheMarker* supplement), entertainment, sports, and gossip (*Ha'aretz*, 8 October 2007). "Media sources" estimated that *Ha'aretz*'s decision to print *Yisra'el Hayom* is a "strategic decision" motivated, not solely by financial considerations, but also by a desire to ally itself with a strong new player against *Yedi'ot Aharonot* and *Ma'ariv* on the basis of the maxim that "the enemy of my enemy is my friend" (*Globes*, 5 September 2007).

Backed by the deep pockets of Sheldon Adelson, who reportedly plans to invest \$180 million in the newspaper over the next three years, *Yisra'el Hayom*, which is distributed in the mornings with an estimated daily circulation of 255,000 copies, is perceived as a serious threat

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by the established Israeli dailies, particularly the financially troubled *Ma'ariv*, but also by market leader *Yedi'ot Aharonot*. It was reported in July 2008, that *Yisra'el Hayom* had achieved a weekday penetration rate of 17.4 percent, overtaking *Ma'ariv* as the newspaper with the second-highest readership. Less concern has been reported at elitist *Ha'aretz*, which relies heavily on a long-standing subscriber base and targets a different readership.

The Seventh Eye writes that "*Yisra'el Hayom* has not been deterred from adding fuel to the fire and has used the tactic of issuing covert threats and fighting statements in the direction of *Yedi'ot* and *Ma'ariv*. In the weeks prior to its launch, anonymous sources identified as 'Adelson associates' were quoted in the morning press as saying that '*Yedi'ot* is afraid of *Yisra'el Hayom*, and it has reason to be'."

Yisra'el Hayom's website (www.israelhayom.co.il) carries the paper's full print edition but only in PDF format.

3.13.3. *Yisra'el Post (Metro Israel)*



- Publisher: Metro Israel Ltd. (Eli Azur)
- Editor in Chief: Golan Bar-Yosef
- Circulation: estimated at 200,000 copies;
Published: Sunday to Friday
- Address: Ha'ahim Meselvita 15, Tel Aviv

Owned by Dedi Weissman and Eli Azur (proprietor of *The Jerusalem Post*), the 24-page newspaper, which began appearing on 5 August 2007, is distributed in the early afternoon at the Weissman-owned Ribu'a Hakahol, AM PM supermarket chains, and the Dor Alon gas stations. Most of the stories are written by journalists already working for Azur's other papers and magazines, and the paper's masthead describes it as part of *The Jerusalem Post* group. Half of the paper is devoted to news, while the rest is op-ed, entertainment, sports, and gossip. On 30 September 2007, the owners decided to change the newspaper's name to *Yisra'el Post* after the international chain of *Metro* newspapers took them to court over their unauthorized use of the *Metro* trademark. According to the latest TGI survey for July 2007-June 2008, *Yisra'el Post* has achieved a penetration rate of 3.5 percent.

4. Ultra-Orthodox Press

Sixty-eight percent of the haredi (ultra-Orthodox) population in Israel read haredi newspapers, according to a survey commissioned by the McCann Erickson advertising group.

Three-quarters of those surveyed by Mutagim and Market Watch, the two polling companies that conducted the survey, said they read newspapers over the weekend.

Respondents said they devoted 20 minutes daily on average to newspaper reading, compared with seven minutes among secular Israelis.

Some 28 percent said they read *Hamodi'a*, a daily controlled by the Gerrer Hassidim, while 21 percent said they read *Yated Ne'eman*, a daily identified with the Lithuanian haredi community. *Mishpacha*, an apolitical weekly, garnered 16 percent of the haredi readership.

Half of those surveyed felt that *Yated Ne'eman* represented rabbinic opinion, while 42 percent felt that *Hamodi'a* did.

The size of the group polled and the study's margin of error were unavailable (*The Jerusalem Post*, 23 December 2007).

There are differences between the ultra-Orthodox and mainstream press, with the former devoting extensive coverage to religious topics, rabbinical decrees, and the internal politics of the ultra-Orthodox political parties. The main haredi newspapers occasionally publish articles strongly criticizing Zionism, naming it a "heretical movement." They sometimes refer to the country as "Israel" and, at other times, will only refer to the geographical entity as "Eretz Yisroel." News reports and commentaries about the Israeli-Arab conflict are almost exclusively right-of-center (en.wikipedia.org).

As opposed to the national-religious community, which perceives the creation of Israel and the 1967 reunification of Jerusalem as the beginning of the "Messianic Redemption," the ultra-Orthodox world views the creation of the modern state as "premature, a step that only the Messiah himself can undertake."

Assuming a more "relaxed stance" on the issue of territorial compromise with the Palestinians, haredi media commentators have expressed the view that "not the territory of Biblical Israel or the status of the Temple Mount will ensure our future, only Torah study -- the supreme value -- will" (Yo'el Kohen, *Palestinians and Israelis: Oh, Jerusalem! Religion in the News*, Spring 2001, www.trincoll.edu). At the same time, surveys consistently reveal that the overwhelming majority of haredi respondents hold strong nationalistic views and that although the leaders of the ultra-Orthodox community, who control the media, might consider territorial compromise on the basis of "pikuah nefesh" -- the Hebrew principle of the primacy of life and saving life -- their followers would staunchly oppose it (*Israel's First 50 Years*, edited by Robert Owen Freeman, University Press of Florida, 2000, books.google.co.il).

Haredi newspapers and Internet media, which are bound by strict religious laws regarding modesty, will not publish photos of women, even those in prominent positions. Spiritual committees composed of rabbis generally dictate what will appear in the haredi press (www.ynet.co.il, 2 February).

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Veteran media observers note that as opposed to its secular counterparts, the ultra-Orthodox press shies from reporting on drug abuse, sexual scandals, or crimes, and when forced to confront "unmentionable" issues such as homosexuality -- against the background of the haredi community's traditional and vehement opposition to Jerusalem's annual Gay Parade -- the newspapers employ euphemisms such as "abomination parade" to describe it (www.haaretz.com, 25 February).

Nevertheless, the ultra-Orthodox media "have gone through dramatic changes in recent years," and "are willing to tackle topics previously considered taboo," such as relationship advice for young couples, as well as mental health and child psychology issues (www.ynetnews.com, 22 June 2005).

4.1. *Hamodi'a*



- Source Descriptor: ultra-Orthodox, Agudat Yisra'el-affiliated
- Publisher: Agudat Yisra'el World Federation
- Executive Editor: Yisra'el Schneider, Yitzhaq Matetyahu Tennenbaum
- Circulation: estimated at 5,000 daily; Publication: Sunday to Friday
- Address: 5 Yehuda Hamaccabi St, Jerusalem; Telephone: 972-2-5389255

Key journalists: Tzvi Rosen, Knesset correspondent; Avraham Gross, economic issues; A. Pe'er, political correspondent; M. Carmeli, party affairs correspondent.

In December 2003, *Hamodi'a's* weekly US edition became a daily delivered to subscribers every morning. The new format included reports and news from the United States, Israel, and the rest of the world, along with commentaries, a business column, and columns on family issues. It was initially distributed in the Brooklyn, Lakewood, and Monsey areas of New York (*Hamodi'a*, 12 December 2003).

In April 2004, the English-language daily also began distribution in Israel. It is published on 28 pages compared with the six-page Hebrew-language paper. The 28 April paper carried on its front page the following statement under the headline "*Hamodi'a* Daily Draws Enthusiastic Response": "The English-language daily, put out by its own staff of editors, was launched in response to instructions of Gedolei Yisra'el [its sages] who fervently believe there is a need for a daily newspaper that is fit for the Jewish home. This also was the logic behind the establishment of the Hebrew-language *Hamodi'a* 54 years ago." A weekly edition is also published in the United Kingdom.

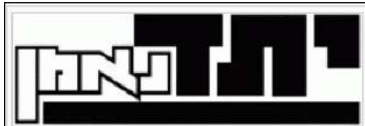
Hamodi'a's English-language website (www.hamodia) gives sparse information about the newspaper but does indicate that the newspaper has no plan to initiate a news website.

Globes reported on *Hamodi'a*'s intention to launch a 64-page weekly edition in French -- divided equally between news, current affairs, and feature articles -- at the end of 2007, with an initial circulation of 15,000. The paper expects circulation to increase to 30,000 copies within three years, most of which will be sold to subscribers.

Hamodi'a said it would invest 1 million shekels in the new weekly edition and sell it at 350 vendors in Paris, Marseilles, Lyon, and Strasbourg. It will also be distributed in residential areas in Israel that are home to French immigrants and speakers (*Globes*, 4 November 2007).

Hamodi'a's website reports that indeed "a French language of Hamodia was launched at the end of 2007," and *Wikipedia's* entry on Hamodi'a claims that the paper's French edition "enjoys a wide circulation both in the French speaking community in Israel and in France itself" (en.wikipedia.org).

4.2. *Yated Ne'eman*



- Source Descriptor: Degel Hatora-affiliated
- Publisher: Yetedot Publishing
- Editor in Chief: Natan Grossman, Y. Rot
- Circulation (Hebrew Edition): estimated at 20,000 on weekdays and 30,000 on Fridays; Published: Sunday to Friday
- Address: 108 Jabotinsky St, Bene Beraq; Telephone: 972-3-6170800

Key journalists: Eli'ezer Rauchenberg, Knesset correspondent; Gershon Lazar, political affairs; Arye Sussman, military affairs.

The TGI survey for January-June 2007 showed that after having begun distributing its expanded and free Wednesday editions in a new color format via direct mailing to 135,000 households in March 2006, *Yated Ne'eman* has increased its circulation noticeably, overtaking *Hamodi'a*, with its weekday Hebrew-language edition achieving an exposure rate of 40.9 percent among the ultra-Orthodox public and 5.2 percent -- the highest level of exposure for an ultra-Orthodox newspaper -- among the general public. The newspaper distributes approximately 20,000 copies to vendors and subscribers on weekdays and 30,000 on Fridays (www.nfc.co.il, 8 March 2006).

Yated Ne'eman also has two weekly English-language editions, both published on Wednesdays. One is published in Israel and distributed in Europe, South Africa, Australia, and

the Far East. The other is published in New York and distributed only in the United States. Some 80 percent of the material found in both papers is on Israeli and Jewish affairs. According to sources at the paper, some 4,000 copies of the English-language Israeli edition and some 30,000 copies of the American edition are sold weekly. The editor of the Israeli edition is Mordekhay Plaut. The editor and publisher of the American edition is Pinhas Lipschitz.

4.3. *Yom Leyom*



Editor in Chief Yitzhaq Kakun (Ynet, 21 May 2007)

- Source Descriptor: Sephardi Torah Guardians (SHAS) affiliated
- Publisher: Yom Leyom Communications 2003
- Director General: Ronen Peretz; Editor in Chief: Yitzhaq Kakun
- Circulation: Estimated between 12,000 and 16,000; Published: Fridays
- Address: 8 Granit Street, Petah Tiqva; POB 10310; Telephone: 972-3-9235216

Key journalists: No'am Zigman and Alon Nuri'el, political affairs; Ahuva Rosenwasser, family affairs; Efrayim Hadad, religious issues.

Businessman Qobi Maimon purchased *Yom Leyom*, formerly a daily, in May 2003 as it teetered on the brink of insolvency under the weight of \$2 million in debt.

Some 80 to 90 percent of the weekly is devoted to the SHAS (Sephardi Torah Guardians) movement led by Rabbi Ovadya Yosef and religious issues. The weekly, like most ultra-Orthodox press, is generally less hawkish than *Maqor Rishon* on the Palestinian conflict and more amenable to a territorial compromise with the Palestinians.

Yom Leyom offers subscriptions in South Africa, Europe, and Latin America. It does not publish an English-language paper. Its circulation is estimated at between 12,000 and 16,000 (www.netonews.co.il).

5. Broadcast Media

Israel's television and radio industry has evolved from a state-controlled monopoly into a highly competitive market offering viewers three public television channels, two commercial channels, and multichannel cable and satellite services, as well as two national radio stations, 14 regional stations, and hundreds of pirate stations. The government has closed down dozens of these pirate radio stations over the years.

Like the print media, the content of Israeli broadcast media is wide-ranging, with extensive domestic and international reporting and commentary spanning the entire political spectrum. Station content also is subject to military censorship and all material seen as potentially harmful to state security must be submitted for review to the military censor.

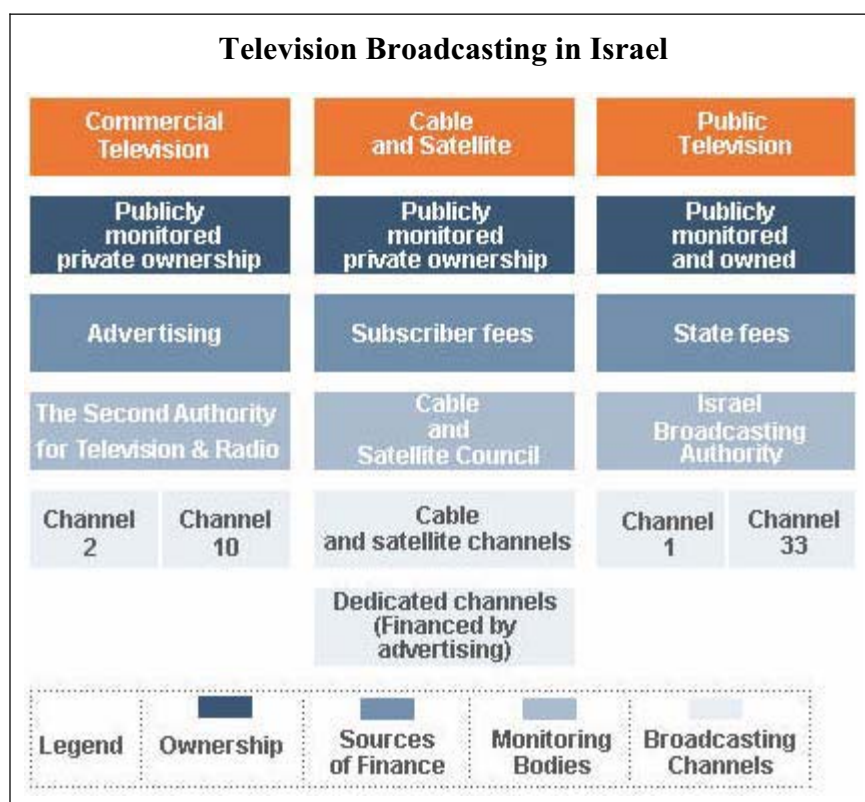
In the period leading up to, as well as after, the country's founding in 1948, radio served as the most important medium for national integration and for developing a common Israeli culture. Radio and now television both play an important role in Israel's continued social integration. In times of security crises, they are used to call up military reserves and carry open-ended programming interrupted by breaking news. Television also has served as an historical catalyst over the years. The live coverage of Egyptian President Anwar al-Sadat's visit to Jerusalem in 1977 played a crucial role in influencing Israeli public opinion. Israelis fell in love with Al-Sadat, thereby facilitating the return of the Sinai Peninsula to Egypt, according to D. Dayan and E. Katz in their book *Media Events: The Live Broadcasting of History*.

Oversight of Israel's television and radio broadcast market is complicated because there are three different regulating authorities: The Israel Broadcasting Authority (IBA) for state-run channels and radio stations; the Second Television and Radio Authority (STRA) for commercial channels and regional radio stations; and the Council for Cable TV and Satellite Broadcasting (CCTSB) for the cable, satellite, and special interest channels. Each body has different powers and legal status. Israeli media experts have pointed out that the rulings of these regulatory bodies occasionally overlap or even contradict each other, as in the case of "asymmetric regulations regarding cross-ownership" of media, "asymmetric regulations regarding cooperation between broadcast bodies," and "asymmetric operating regulations" ("National Communications Authority: Neither a Nightmare Nor a Panacea," by Dr Hillel Somer, Herzliyya Interdisciplinary Institute, 2004).

Israeli officials over the last few years have proposed to unify these regulating authorities, but while current Communications Minister Ari'el Atias, along with his predecessor Dalya Itzik, are in favor of amalgamating the STRA and CCTSB into a "Union of Councils," the Treasury and Justice Ministry prefer to close down the Communications Ministry altogether and replace it with an autonomous "National Communications Authority" similar to the United Kingdom's Ofcom, that will include the STRA, CCTSB, and IBA (*TheMarker*, 19 February).

5.1. Television Overview

Television was late in coming to Israel. It was introduced in 1968 in the wake of the Six-Day War when the government believed it would serve as a bridge to the Arab population in the newly occupied territories. For the next 25 years, Israel Television -- which became Channel 1 -- was the only available channel, dividing its time between educational and public programming. In 1993, Channel 2, the first commercial television channel was established, and a third channel, Channel 10, also commercial, was set up in 2002. Cable television arrived in 1990, and Israeli-owned satellite channels came on the air in 2000.



(Second Television and Radio Authority)

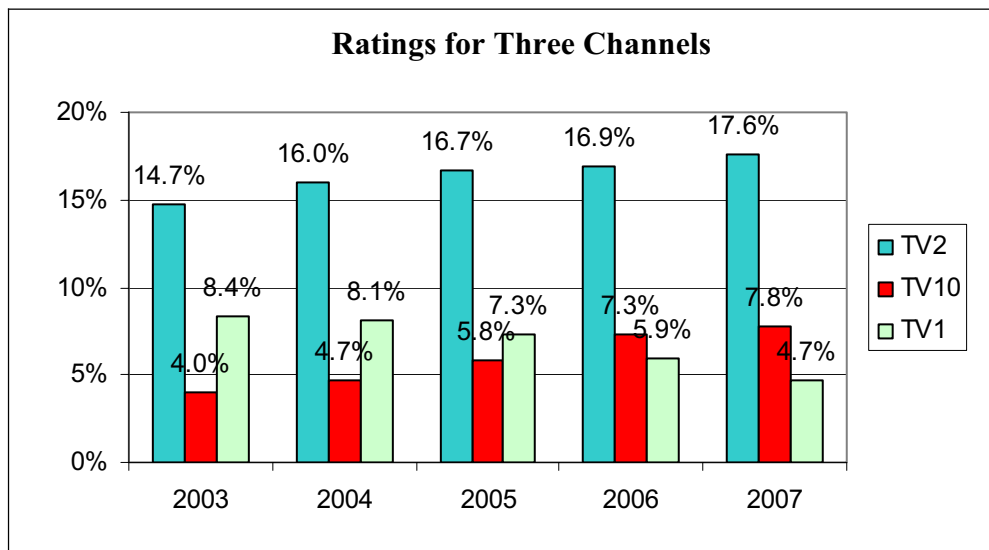
During television's early years, many British programs were aired, but in recent times, American programs have become pervasive. When airing foreign films, Israeli television keeps original soundtracks and uses Hebrew subtitles.

Approximately 92 percent of Israeli households have television. Israeli television has an audience of about 4.5 million out of a population of over 7 million. This audience does not include the Arab population who prefer foreign Arabic-language stations which they receive through private satellite service, the ultra-Orthodox Jews who do not watch television for religious reasons, and a large percentage of immigrants from the Commonwealth of Independent States who prefer to watch Russian-language stations.

Israeli youths watch television for an average of 3.4 hours a day, while 75 percent of adult viewers watch for 2.9 hours daily. On weekends, both adults and youths watch for an average of 3.5 hours a day (Second Channel Radio and TV Authority survey, 7 December 2006, *Yedi'ot Aharonot*, 11 February 2007).

The news remains the most-watched program, with rating surveys consistently showing over 40 percent of viewers tuning in daily to watch the evening newsreel on at least one of the three national channels. Television ratings for 10 March, for example, show Channel 2's evening newsreel with 21.5 percent; Channel 10's with 12.6 percent; and Channel 1's evening newsreel with 6.5 percent of viewers (walla.co.il, 10 March 2008).

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Average annual rating among Israeli households during 2000-2300 primetime (Ha'aretz, 24 December 2007; TGI)

While the cable and satellite companies' subscriber base continues to grow, Israeli television viewers apparently prefer to watch the three terrestrial channels via their cable and satellite packages. Unlike the trend in the West, where people are moving from network television to cable and satellite, the terrestrial channels in Israel have managed to increase their percentage of viewers. The ratings for multichannel television dropped from 53 percent in January 2004 to 44 percent in December 2006, while the overall ratings for Channels 1, 2, and 10 increased from 47 percent in January 2004 to 56 percent in December 2006, with 32 percent of the public preferring Channel 2, 18 percent opting for Channel 10, and only 6 percent watching Channel 1 (*Yedi'ot Aharonot*, 11 February 2007).

5.2. State-Run Television

5.2.1. Israel Broadcasting Authority



- Director General: Moti Shklar
- Address: 161 Yafo Street; Jerusalem;
Telephone: 02-5015522; Fax: 02-5015521
- E-mail: dover@iba.org.il

State-owned television is controlled by the IBA, which is an autonomous body modeled on Britain's BBC and mandated by law to "provide education and entertainment programming and to supply information in the fields of politics, society, economics, culture, and the arts to domestic and foreign audiences, including neighboring Arab countries and Diaspora Jewry (www.iba.org.il/). The IBA director general is appointed for a five-year term by the government and acts as editor in chief of all IBA television broadcasts.

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Some 75 percent of the IBA's overall budget comes from a users' license fee of \$90 a year for anybody owning at least one television set. The rest comes from public service announcements and state funds.

Over the past few years, the IBA has been suffering from financial difficulties. It was reported in *Ha'aretz* on 16 September 2007 that "the Finance Ministry will today present the chairman of the Israel Broadcasting Authority (IBA), Moshe Gavish, with an 860 million shekels plan to save the organization. The focus of the emergency plan is reducing the number of IBA employees by 850 -- almost half of the workforce -- accompanied by a 500-million shekel investment in upgrading the infrastructure and technology for television broadcasts."

The report stated that "the Finance Ministry's proposal requires the employees who remain at IBA after the cutbacks to sign a new collective bargaining agreement known as a 'second-generation agreement.' The new contracts will not include overtime, shift work, or fictitious expense reimbursement" and that the plan, "while leading to a steep drop in salaries, will reportedly be designed to protect employees' future pensions."

Ha'aretz adds that the Finance Ministry threatened that "if the IBA's management or its unions do not accept the plan, then it will cut off the flow of funds to the authority -- and Channel 1 is very likely to shut down as a result" (*Ha'aretz*, 16 September 2007).

After noting that the recovery plan had been approved by the IBA's institutions, the Israeli Government, and the Knesset's Finance and Economics Committees, the IBA's Executive Committee instructed management on 28 February 2008 to either sign the required agreements with the workers unions by 30 April 2008 or unilaterally implement a recovery plan through court order (www.iba.org.il).

5.2.2. Channel 1



- Source Descriptor: state-funded television, independent in content
- Address: 15 Tora Metziyyon, Jerusalem; POB 7139; Zip 91071; Telephone: 02-5301333

Key journalists: Oded Granot (Arab affairs) and Ayala Hason-Nesher (political).

The IBA's flagship television station, Channel 1, airs around-the-clock news and entertainment programming, including dramas and comedies, talk shows, variety shows, documentaries, and sporting events, 70 percent of which must be locally produced. Channel 1 does not air commercials but carries "public service announcements" from government-owned corporations and sponsorship screens by private sector companies.

What was Israel's first and for many years leading channel is now the least popular of the three national channels, both for news and general content.

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Channel 1 has not had a director since the resignation of Moti Eden in mid-2006. This position was traditionally held by Channel 1 insiders, but now IBA Chairman Moshe Gavish and IBA Director General Moti Shklar reportedly are looking outside the IBA for people to fill key positions (*The Jerusalem Post*, 23 September 2007).

Channel 1 carries a 7-minute English-language news broadcast Sunday through Thursday at 1650 (1450 GMT). (During Daylight Savings Time, Israeli local time is GMT +3; the rest of the year, it is GMT +2.)

5.2.3. Channel 33



- Address: Ulpaney Habira 206 Yafo Street, Jerusalem; Zip 91131
- Telephone: 02-5013800
- E-mail: arutz33@iba.org.il

The IBA also operates Channel 33, which is transmitted via cable and local satellite. Channel 33 is the sole producer of domestic Arabic-language TV programming, although a tender has been issued for a commercial Arabic-language TV channel. It airs three and a half hours of Arabic-language programming daily between 1600 and 2000 local time (1400 and 1800 GMT), as well as 30 minutes between 1300 and 1330 local time (1100 and 1130 GMT). On Fridays and Saturdays, Channel 33 increases its Arabic-language programming to approximately nine hours daily.

At the end of February, the IBA inaugurated an Arabic-language website (www.iba.org.il/arabic) for "Israeli Arab and Palestinian Internet surfers as well as people from neighboring countries." Surfers will be able to access the latest news online, as well as listen to live IBA broadcasts. The website's manager Shay Komoranik said that since going online, the site has received "encouraging feedback" from Egypt and parts of Iraq, Turkey, and Syria with large Kurdish populations (*NRG*, 2 March).

Channel 33 also carries 22 minutes of English-language news at 1700 local time (1500 GMT).

5.2.4. Israel Educational Television



- Address: 14 Klausner Street, Tel Aviv 69011, Israel
- Fax: 97236466164

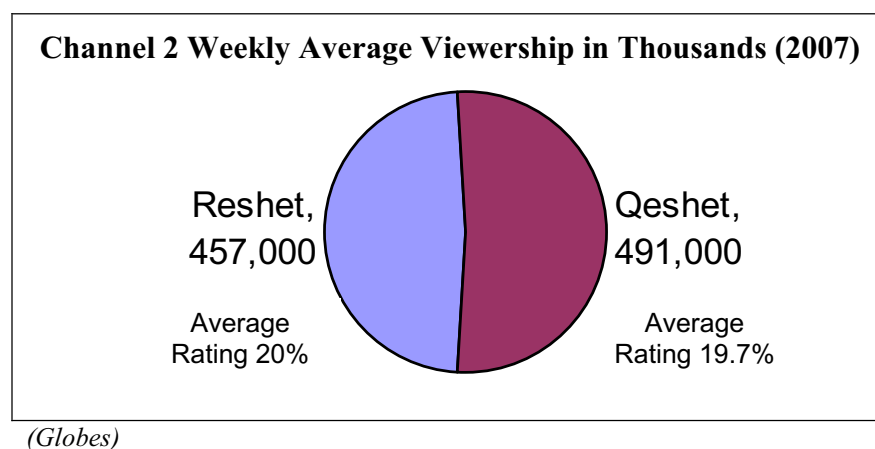
Channel 23 is an around-the-clock educational channel operated by the Ministry of Education with new daily broadcasts between 0800 and 2400 local time (0600 GMT-2200 GMT) and reruns of the same day's programs between 0000 and 0800 local time (2200-0600 GMT). The channel takes up 2 percent of Channel 1 and Channel 2's broadcast time.

Around 40 percent of the station's broadcasts are produced in-house, with the remaining 60 percent acquired from various Israeli sources and from abroad. While the channel's status has never officially been anchored in law, its original mandate was to broadcast daily educational programs to schools; over the years, however, Channel 23 has sought to target other audiences by hosting programs on topical affairs, consumer news, soap operas, and other shows. (www.moc.gov.il). Channel 23 carries a daily 30-minute newsmagazine at 1500 GMT which also is broadcast on Channel 1.


5.3. Commercial Television

Since 1990, the Second Television and Radio Authority has been the public authority responsible for supervising commercial networks in Israel. It is headed by a 15-member public council "reflecting the diversity of opinions held by the public," which "determines the authority's supervision and broadcasting policies and chooses the authority's director general, who is charged with carrying out these policies" (www.channel2.co.il). Some 40 percent of all programming must be local, and a certain amount geared toward children. Nurit Dabush is the Second Television and Radio Authority's current chairman. The STRA carries out tenders for television and regional radio broadcasts and grants broadcasting franchise licenses, which last for four to 10 years. Advertising provides most of the revenue for the channels, which must pay eight percent of their proceeds to the state in royalties. The STRA is currently responsible for Channel 2, Channel 10, Educational Television, and the regional radio stations.

5.3.1. Channel 2



Since 1 November 2005, Channel 2, which went on the air in November 1993, has two franchisees -- Qeshet and Reshet -- which are owned by several of Israel's richest families.

	Reshet-noga	
	✉ Address	23 Habarzel st. Ramat Hahyal Tel Aviv
	☎ Tel	972-3-7690000
	☎ Fax	972-3-7690060
	🌐 Internet	www.reshet.tv
	🗣 General Manager	Yohanan Zangan

(The Second Television and Radio Authority)

- Lyn-Or Communication Ltd. (controlled by Udi Engel and Idan Ofer) owns 51 percent of Reshet. Aviv Gil'adi and Udi Recanati's RGE Group own 20 percent of the shares. The Strauss family owns 16 percent, and the remaining 13 percent are held by Ogen Yam Holdings Ltd. (www.reshet.tv).

	Keshet Broadcasting Ltd.	
	✉ Address	12 Raul Vallenberg St. Tel Aviv 61580
	☎ Tel	972-3-7676000/1
	☎ Fax	972-3-7676007
	🌐 Internet	www.keshet-tv.com
	🗣 General Manager	Avi Nir

(The Second Television and Radio Authority)

- Qeshet is owned by Muzi Wertheim (51 percent), the Lemelbaum Group (15.32 percent), Bank Leumi (20 percent), US citizen Willy Nagel (7.76 percent), and Alex Gil'adi (5.92 percent) (www.rashut2.org.il, 4 March).

Qeshet currently broadcasts Sunday through Tuesday while Reshet broadcasts Wednesday through Saturday. They switch their broadcasting days each January.

	Israel News Company Ltd.	 Address	Neve Communication Center D.N. Harei Yehuda 90850	Ilan
		 Tel	972-2-5339900	
		 Fax	972-2-5339809	
		 General Manager	Avi Wiess	

(The Second Television and Radio Authority)

Both franchises finance and broadcast Israel's highest-rated television news show, which is produced by the Israeli News Company (www.rashut2.org.il).

Channel 2's leading news commentators are Amnon Abramovich, Ehud Ya'ari (Arab affairs), Roni Daniyel (military affairs), and Udi Segal (political).

Some observers have criticized the concentration of ownership in the Israeli media, suggesting that "Israel's press and television are controlled by a handful of families who aren't shy about wielding their clout as far as news is concerned" (*Ha'aretz*, 7 February 2003). This criticism was underscored by a number of issues involving Channel 2 in recent years.

- An example of these families influencing the news occurred in 2006, when Ilan Dayan's weekly investigative program, "feted as the most influential show in the country," faced pressure brought by shareholders in Qeshet, the company broadcasting her show, to suppress a piece dealing with the cover-up of a near-miss incident involving an Israir jetliner. The ensuing scandal eventually enabled Dayan to screen the segment, but it highlighted the fact that no journalist is immune to the limitations imposed by big business" (*The Jerusalem Post*, 21 September 2006).
- In May 2007, the STRA decided not to extend the tenure of Yitzhaq Livni as chairman of the board of Channel 2's news company. Livni later claimed in an interview that he was ousted from his position because he opposed Channel 2 franchisees' owners Muzi Wertheim's and Idan Ofer's pressure to appoint their friend, veteran journalist Rafi Ginat, as director general of Channel 2's news company (*Ha'aretz*, 31 May 2007). The move to appoint Ginat ultimately failed, and Avi Weiss -- who served as temporary director general following the May 2007 resignation of Shlomo Qital -- was appointed director general by the Channel 2 News Company's board of directors on 12 May 2008 (www.haaretz.co.il).

The yearly ratings data between September 2006 and August 2007 show that Channel 2 achieved an eight-year peak in its primetime viewership with an average daily audience of 480,000, making up 17.8 percent of Israeli households. Qeshet, which has been described as "the entertainment and game show channel," had more viewers than Reshet, averaging 18.2

percent of the primetime audience (over 490,000 viewers). Reshet, "the drama channel" had a 17.4 percent rating (approximately 469,000 viewers) (*Ha'aretz*, 4 September 2007).


The "grandiose" programming commitments made by the two Channel 2 franchisees, in which they promised to spend hundreds of millions of shekels annually on "content," including the 295 million shekels they jointly bid to win the broadcasting rights tender issued by STRA that reduced the number of Channel 2 franchisees from the original three to two in November 2005, initially weighed heavily on the shareholders. The extended news coverage of former Prime Minister Ari'el Sharon's collapse, the subsequent elections, and then the Lebanon war in August 2006 also required large financial outlays.

Ratings, however, rose on average by 5 percent in 2007, and both franchisees increased their income from advertising. The latest figures available indicate that Reshet was expected to generate \$105 million in income in 2007 with Qeshet generating \$125-130 million in income in 2007 (*TheMarker*, 24 December 2007).

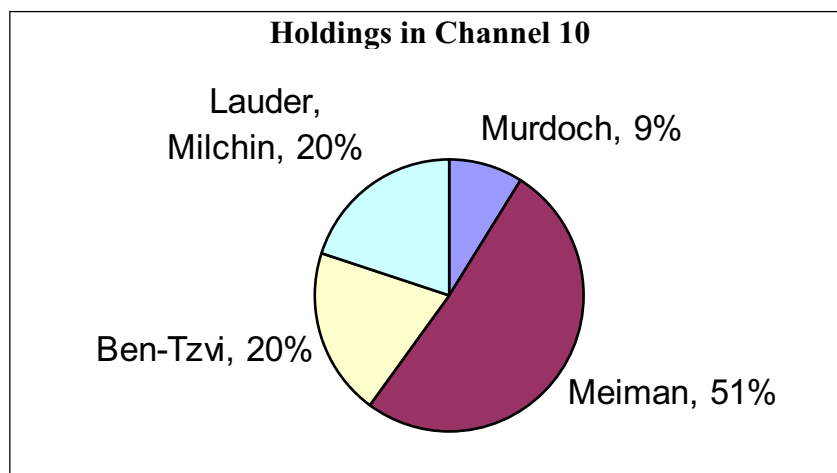
Qeshet and Reshet maintain websites (at www.keshet-tv.com and www.reshet.tv), which contain downloadable content, segments from television programs (including clips that were not broadcast), forums, blogs, interactive games, and live video feeds.

The Channel 2 News Company also produces the Knesset channel which has been on the air since 2004. The Knesset has given Channel 2 a budget of about \$3.3 million annually for the channel. It is modeled on the American C-SPAN network and does not carry advertising. The Knesset channel broadcasts from 0700 to midnight local time (0500 to 2200 GMT), five days a week. Viewers can receive the channel on cable and satellite (*Yedi'ot Aharonot*, 3 March 2004).

5.3.2. Channel 10

	Israel 10	Address	53 Derech Hashalom st. Givatayim 53454
		Tel	972-3-7331000
		Fax	972-3-7331040
		Internet	10tv.nana10.co.il
		General Manager	Modi Frydman

(The Second Television and Radio Authority)



(Ha'aretz)

The advent of Channel 10 in January 2002, with Israel 10 as its franchise, ended Channel 2's monopoly on commercial television.

Channel 10 lost money immediately after its founding, and many observers predicted its imminent closure. However, its largest shareholder, Israeli businessman Yosi Maiman, poured tens of millions of dollars of his private money into the station and initiated cost-cutting measures (*Ha'aretz*, 2 March 2004).

In January 2004, two new investors, US businessman Ron Lauder and Israeli businessman Shlomo Ben-Tzvi, bought a 60 percent stake in the cash-strapped network for \$15 million, leaving Maiman with 40 percent interest (*Ha'aretz*, 12 February 2004).

Maiman subsequently bought back some shares and now owns 51 percent of Channel 10. It is estimated that he has invested approximately 600 million shekels in Channel 10 since its establishment. US businessmen Ron Lauder and Arnon Milchin together own 20 percent of the channel, and Rupert Murdoch's News Corp. purchased 9 percent in November 2006 (*Ha'aretz*, 29 January 2007; www.allbusiness.com, 1 November 2006). Shlomo Ben-Tzvi owns the remaining 20 percent.

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Channel 10 lost approximately \$22 million dollars in 2005, \$30 million in 2006, and while official figures have not been released, the channel was expected to lose between \$20 and 25 million in 2007 (*Ha'aretz*, 6 September 2007). The channel's director general, Mudi Friedman, said he expected the channel to achieve profitability in 2008 or 2009 (*Ha'aretz*, 27 October 2006).

The channel is taking steps to increase its appeal to customers. It has taken star talent from Channel 1 and Channel 2 for its news programs and quiz shows and has significantly increased the number of primetime Hebrew-language programs it carries. As a result, Channel 10's primetime rating has grown steadily from 0.4 percent in January 2002 to a yearly average of 7.1 percent in 2006 and 7.6 percent in the first 10 months of 2007 (*Ha'aretz*, 6 September 2007, 4 November 2007).

In the second half of 2007, Channel 10 launched the Israeli versions of "Iron Chef" and "Survivor." In what was viewed by media observers as a "watershed moment," "Survivor" became the top-rated Israeli television program in early 2008, helping other Channel 10 programs broadcast on the same evenings challenge and even win more viewers than their Channel 2 rivals (www.ynet.co.il, 7 February; www.nrg.co.il, 20 March).

Despite expectations that Channel 10 would serve as a quality alternative to the "populistic tyranny" of Channel 2, critics have charged that the channels' competition for viewers and advertising has lowered the level of general programming to "the broadcast common denominator," with one writer describing the station as Channel 2's "slightly more polished but agenda-less little brother" (walla.co.il, 17 January).



(The Second Television and Radio Authority)

Key commentators: Alon Ben-David, military affairs; Raviv Drucker, political; and Tzvi Yehezqeli, Arab affairs.

Channel 10's evening political talk show -- London and Kirschenbaum -- and its news programs have become popular for their irreverent approach to politicians, their more critical approach to the IDF (which was most apparent during the second Lebanon war in 2006), and their exposes of corruption.

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Channel 10 appears to be seeking the "news channel" niche, providing an average five hours of news daily, compared with three hours on Channel 2 (*Ha'aretz*, 4 September 2007). Its evening newsreel ratings are constantly improving, rising from 7.3 percent in April-June 2006 to 9.3 percent in April-June 2007. During the second Lebanon war, Channel 10 news greatly improved its standing among viewers and, in September 2006, even briefly enjoyed higher ratings than Channel 2 (*Ha'aretz*, 12 July 2007).

In May 2007, Channel 10 bought 50 percent of the *Nana Internet* portal from Netvision for \$22.5 million. The portal was renamed *Nana 10* and now carries Channel 10 content (*Ha'aretz*, 8 June 2007).

5.4. Cable, Satellite Television

Communications Ministry representative Yoram Moqdi heads the 14-person Council for Cable TV and Satellite Broadcasting established by the 1982 Bezeq Telecom Law. The HOT cable company carries 147 television channels -- 54 of them produced in Israel -- portals, and interactive games. The YES satellite company has some 120 television channels of which 53 are locally produced. These channels are funded by subscriptions and are not permitted to carry commercials. They pay 3.5 percent of their revenue to the state for their licenses.

The CCTSB also oversees special interest commercial channels -- the Russian-language Israel Plus, which broadcasts 21 hours a day, and Music 24, which broadcasts Israeli music around the clock. These channels were established in 2002 and are funded through advertising. There are plans to establish a new Jewish and Israeli heritage channel to replace the defunct Tekhelet channel, which went off the air in April 2006; however so far, no investor has met the criteria set by the CCTSB (www.ice.co.il, 16 September 2006; www.moc.gov.il, 2006 report).

Both cable and satellite offer live foreign news channels. These include Fox News, CNN (on YES), BBC, Al-Jazirah, and Sky News, as well as channels from Egypt, France, Germany, Hungary, India, Italy, Jordan, Morocco, Romania, Russia, Spain, and Turkey. Some 80 percent of households (approximately 1.5 million subscribers) have multi-channel television. Of these, 67 percent are connected to cable television, and 33 percent are connected to satellite television (November 2006 report; *Ha'aretz*, 18 September 2007).

The HOT cable company complained in November 2007 that the stealing of cable television signals has "attained the dimensions of a national plague." HOT estimated that about 150,000 households, or the equivalent of nearly 20 percent of its subscriber base, are illegally tapping into its television signals, costing it tens of millions of shekels a year (*Ha'aretz*, 25 November 2007).

At the end of 2007, both HOT and YES began High Definition (HD) TV broadcasts on selected channels. Subscribers interested in receiving HDTV broadcasts are required to pay installation costs and an extra monthly fee.

Both the cable and satellite companies are concerned by the government's plan to introduce DTT (Digital Terrestrial Television) through a third provider at the end of 2008. If this plan is implemented, television viewers will be able to pay \$100 for a decoder box and receive a five channel package (Channels 1, 2, 10, 33, and the Knesset) at no cost. HOT Director General

David Kamenitz has expressed fear that between 7 and 10 percent of multi-channel subscribers may opt for DTT, causing both HOT and YES to lose over 330 million shekels in revenues a year.

Internet Protocol Television (IPTV) broadcasts, which have still not started in Israel, are seen as posing another threat to the multi-channel television industry (*Ha'aretz*, 18 September 2007).

5.5. Cable Television

5.5.1. HOT



Israel now has one national cable company, HOT, after the three regional companies Matav, Tevel, and Golden Channels completed their merger at the end of 2006. They united under the name HOT after sustaining heavy losses due to hefty infrastructure investment and bad management. The merger, a financing agreement reached between HOT and Israeli banks, and the weakening US dollar

slashed the company's financing costs from 344 million shekels in 2006 to 206 million in 2007, thus enabling HOT to register a net profit of 66 million shekels -- for the first time after seven years -- in 2007 (*TheMarker*, 20 March).

At this stage, only HOT is licensed to provide its customers with a triple play package (television, high-speed Internet with cable modem technology, and telephone service over cable), and by August 2007, 15 percent of its subscribers were receiving this service. HOT also maintains a big lead over its satellite rival YES as the main provider of Video On Demand (VOD) content since 2005, with over 350,000 subscribers as of October 2007. Internet and telephone services were HOT's main growth engines in 2006 and in the first half of 2007 (11 percent and 8 percent respectively). HOT had 288,000 telephone subscribers at the end of September 2007, and HOT's marketing director claimed that the numbers are growing by between 10,000 and 12,000 subscribers per month. At the end of the third quarter in 2007, HOT had 934,000 subscribers, 590,000 of which also were receiving high-speed Internet service (*Ha'aretz*, 28 May, 18 September, 17 October 2007; *Ynet*, 22 November 2007).

The US-based HDTV channel VOOM produces and broadcasts selected content from 15 original HD leisure and entertainment channels. HOT plans to air the channel 24 hours a day, seven days a week in English. Hebrew subtitles are expected to follow at a later stage (*Globes*, 30 October 2007).

HOT is owned by public shareholders (26.76 percent), Yedi'ot Communications (16.7 percent), Yitzhaq Tshuva's Delek Investments (15.92 percent), Bank Leumi (15.35 percent), Eli'ezer Fishman (11.1 percent), Bank Hapoalim (5.96 percent), Bank Habenleumi (5.07 percent), and Monitin Press Holdings (3.47 percent) (maya.tase.co.il, 19 March).

HOT has a Hebrew-language website at www.hot.net.il/hot.

5.6. Satellite Television

5.6.1. YES



The YES national satellite company began operating in July 2000 using Israel's Amos 1 communications satellite. In July 2001, an amendment to the Telecommunications Law opened the multichannel subscriber television market to full competition and separated content (broadcasting) from infrastructure. As a response to Direct Broadcasting Satellite (DBS) service operated by YES, the cable companies introduced program packages as well as digital transmission technology. The cable and DBS operator must carry Channel 1 and Channel 2 as well as the two existing special interest channels: the Israel 24 music channel and Channel 9 in Russian. Other special interest channels slated for establishment include an Israeli heritage Channel, a 24-hours-a-day news channel, and an Israeli Arabic-language station (www.rashut2.org.il).

Investors in Israel's satellite company include Bezeq with 49.8 percent interest, Sha'ul Elovitch's Eurocom (32.6 percent), Polar Communications (7.9 percent), Gilat Satellites (5 percent), and Lidan (4.7 percent). Since assuming its controlling interest in the company, Bezeq has invested 1.56 billion shekels in YES in an effort to strengthen the company's financial position. Despite this infusion of funds, YES was suffering from a deficit of nearly 3 billion shekels at the end of 2006, during which it suffered net losses of 320 million shekels. Conditions in 2007 improved, with YES's net losses shrinking by nearly 50 percent to 118 million shekels (*Ha'aretz*, 1 April, 18 September 2007; *TheMarker*, 26 March).

YES has steadily increased its customer base, reaching 549,000 subscribers at the end of 2007, up from 540,000 at the end of 2006, and increased its revenues of 1.415 billion shekels in 2007, as opposed to 1.356 billion shekels in 2006 (*TheMarker*, 26 March).

On 25 July 2007, the Knesset approved Amendment No 37 to the Bezeq and Telecommunications Law, in effect permitting YES, as well as other bodies, to provide VOD services via a fast Internet infrastructure. YES, however, has yet to overcome the technological difficulties because VOD needs a larger bandwidth than its mother company Bezeq's current ADSL infrastructure can support and upgrading this will require large investments. Bezeq says it is still examining the issue. Meanwhile, only 10,000 YES subscribers with YES Max decoder boxes can receive VOD broadcasts at fixed times (*Ynet*, 26 July 2007).

YES, in conjunction with the *Walla Internet* portal, maintains a video platform on its website (www.yes.co.il) that will have the capacity to carry 800 hours of video, mainly produced by YES. YES's managers "understand that the future generation of consumers is abandoning traditional television venues" and prefer to watch video content over the Internet rather than through a cable or satellite connection (*Ha'aretz*, 22 August 2007).

Unusual Power Outage

Between early September and mid-October 2007, YES subscribers experienced massive broadcast disruptions shortly after an Israeli air strike against what international media reports

said was a nuclear reactor in northern Syria on 6 September. On 15 October, Israeli media reported that the "electronic disturbances" "were caused by powerful radar equipment onboard a Dutch Navy vessel deployed off the Lebanese coast to collect as much information as possible about the military events" in northern Syria. Dutch defense officials later denied the charges, saying: "Our checks showed that we were 100 percent not responsible" and added that "Holland expected the Israeli Defense Ministry to issue a clarification concerning their earlier accusatory comment" (*The Jerusalem Post*, 15, 29 October 2007).

YES spent large sums of money unsuccessfully investigating the source of the disturbances, ultimately seeking the help of the Israeli Defense Ministry in stopping the disruptions. It also sustained a huge public relations blow, with Communications Minister Ari'el Atias calling it a "national crisis" and media experts going so far as to question the viability of satellite broadcasting. Disgruntled clients even presented a 122-million shekel class action lawsuit against YES.

By way of compensation for the disturbance, YES gave its clients free access to all of its channels, including premium content, for a period of three months. YES's director general estimated that the compensation package would cost the company over 20 million shekels. (*Ha'aretz*, 16 October 2007).

Satellite television, like cable television, offers viewers everything from religious to pornographic channels, sports, films, children's channels, and even a channel for children under one year of age, as well as foreign news channels picked up by satellite.

5.7. *Radio*

From July 2007 to June 2008, some 75.6 percent of Israelis listened to the radio regularly -- especially to the news -- with the data showing that overall listening time averaged 132 minutes per day (TGI Survey, July 2007-June 2008).

Most Israelis still listen to several newscasts a day, and many keep the radio on at all times for breaking news. Buses usually have the radio on either the Voice of Israel (VOI) or IDF Radio to help passengers stay abreast of current events (*Ha'aretz*, 4 December 2003).

Almost all of the national and regional radio stations have websites and can be listened to live online. The regional radio stations, especially those operating in the peripheries, achieve high rates of listening in their area, offering their listeners content such as local news, regional public information, coverage of entertainment and sporting events taking place in the area, and more (www.rashut2.org.il).

Electronic Media Map

<i>Regional Radio</i>	<i>Voice of Israel</i>	<i>IDF Radio</i>	<i>Pirate Stations</i>
<i>Privately owned Public supervision</i>	<i>Publicly owned</i>	<i>Publicly owned</i>	<i>Privately owned No supervision</i>
<i>Advertising Sale of services</i>	<i>License fee, advertising</i>	<i>State budget, advertising</i>	<i>Advertising, donations</i>
<i>Regional stations</i>	<i>National networks</i>	<i>Educational stations</i>	<i>IDF Radio</i>
		<i>Galgalatz</i>	<i>About 150 national and regional stations</i>

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- A TGI survey of 10,000 Israelis over the age of 18 found that VOI's share of the listening audience stood at 42.1 percent from July 2007 through June 2008. VOI's Network B was the single most popular station -- with a 28.3 percent audience share. Nearly 1.5 million Israelis regularly listen to VOI news, which is broadcast on the hour and half-hour on Network B.
- Between July 2007 and June 2008 regional radio stations maintained an audience share of 34.9 percent (TGI Israel).

5.7.1. *Voice of Israel*

Israel's oldest radio station, VOI began transmitting illegally during the last years of the British Mandate. When the state was founded in 1948, VOI was installed in the Prime Minister's Office to serve the government. In 1965, VOI became a public radio network modeled after the BBC, administered by a largely independent IBA, and financed by user fees. In 1968, it added a light channel for young listeners and a classical music network, while reserving Network B for news and current affairs. VOI now has nine stations, each tailored to a different audience. The stations can be accessed from the IBA's website at www.iba.org.il.

VOI's nine stations broadcast in aggregate over 200 hours daily in 15 languages over its domestic networks and international service. They are:

- **Network A:** 97.2 FM (greater Tel Aviv and Haifa areas), 102.8 FM (northern and upper Galilee), 98.4 FM (Jerusalem and the central region), and 1458 AM (Eilat) -- operates 24 hours a day and carries short programs in English (45 minutes in three daily casts), French (45 minutes in three daily casts), and Spanish (15 minutes, once a day), in addition to its Hebrew-language programs on such topics as literature, science, Israeli heritage, and education.
- **Network B:** 95.5 FM (Tel Aviv), 103.7 FM (Haifa), and 90.7 FM (Eilat) -- is the main source of news and current affairs for Hebrew-speaking Israelis. It transmits on the AM and FM bands around the clock. Apart from news on the hour and half hour, it carries current affairs, sports, social, economic and entertainment programs. During a security crisis, the station drops its normal programming and switches to live coverage of the event. Its website at www.iba.org.il/bet features breaking headlines, news on various topics and forums, as well as recorded and live broadcasts.
- **Network C:** 89.7 FM, 97.8 FM (Tel Aviv), and 97.7 FM (Galilee) -- carries 24 hours of nonstop Israeli music and entertainment programs directed at young audiences, as well as relaying Network B's newscasts on the hour between 0600 and 0100.
- **Network D:** 90.3, 92.4 FM (Haifa region), and 99.3 FM (Safed area) -- is a 24-hour-a-day Arabic-language channel that transmits in Israel and throughout the Arab world. Content includes 17 news bulletins and a wide variety of current affairs, entertainment, religious, musical, and phone-in programs.

- **The Voice of Music:** 91.3 FM, 94.4 FM, and 97 FM (Eilat) -- transmits classical and modern music as well as jazz from Israel and abroad 24 hours a day on the FM band.
- **International Service:** On 31 March 2008, VOI discontinued its daily International Service shortwave and medium wave broadcasts in 14 foreign languages to Russia, Western Europe, North/Central/Latin America, the Middle East, Asia and the Pacific. These broadcasts, which serve as the main link between Israel and Jewish communities abroad, are now carried live on the following website: www.intkolisrael.com. Apart from news, the website features documentaries on Judaism, culture, and immigrant absorption.



- **REQA:** 954 AM, 101.2 FM, and 101.3 FM -- a Hebrew acronym for the Immigrant Absorption Channel, transmits 24 hours a day in the following 15 languages: English, French, Spanish, Ladino, Hungarian, Yiddish, Tat (Dagestan and Azerbaijan), Bukhori (Indo-Iranian), Georgian, Amharic, Persian, Romanian, Maghrebian, Russian, and Tigre. Russian-language broadcasts are heard for 10.5 hours daily. REQA's programs are aimed at helping immigrants understand what is happening in the country. It broadcasts news and current affairs, a survey of the Hebrew-language press, interviews,

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and Hebrew lessons. Its website, www.iba.org.il/reka, provides live broadcasts of the station's programs, selected links to media sites, and news updates.

- **Tradition Network:** 97.2 FM, 100.7 FM (Tel Aviv), and 98.4 FM (Jerusalem) as well as on 531 and 1,458 kHz -- transmits around eight hours daily of Hassidic music, programs on Jewish issues, and Bible studies.
- **Network 88:** 88 FM and 87.6 FM (northern Israel) -- takes pride in playing "quality" music from all genres as well as round the clock traffic news.

The Voice of Israel, together with the Education and Communication Ministries, also manages an "Education Radio Project" in which students from approximately 80 educational institutions such as schools, colleges, and universities man approximately 30 local radio stations throughout the country, all broadcasting on the bandwidth 106 FM. The stated aim of this project, according to the IBA website, is to attract young Israelis from the periphery to join the media industry.

VOI's website at www.iba.org.il offers a selection of the day's news divided into categories, live (only in Hebrew) and recorded (in Hebrew, English, French, Spanish) radio and television programs, links to and broadcasting schedules of all networks and frequencies, biographies of journalistic and production staff, forums, contact e-mail address, and a site search engine.

5.7.2. IDF Radio

Military radio, established in 1950, has two stations Gazley Tzahal and Galgalatz, both of which operate around the clock and provide news on the hour and half hour. Galey Tzahal broadcasts news, current affairs, music, and talk shows on 104 FM, 1287 AM (Tel Aviv) and 102.3 (Haifa). It also transmits on shortwave to Europe on 15785 between 0600 and 2000 (0400-1800 GMT) and on 6973 between 2000 and 0600 (1800-0400 GMT) during daylight savings time. In winter, its hours are 0800-1800 (0600-1600 GMT) and 1800-0800 (1600-0600 GMT) respectively.

Galgalatz broadcasts music and traffic updates on 91.8 FM (Tel Aviv) and 107 FM (Haifa). Having a song selected for the station's playlist virtually guarantees its success. The radio is operated mainly by conscripts, who work alongside veteran journalists called up to the military reserves, which creates "reliable and professional broadcasting by veteran correspondents with the fresh and energetic spirit of the soldiers," according to the station's website at www.glz.msn.co.il. The defense minister appoints the station's editor in chief to a three- or four-year term. Yitzhaq Tuniq, a former journalist who also worked at the IDF Spokesman's Office, is the current editor.

Some 45.3 percent of Israelis over the age of 18 listen to one or both IDF Radio stations, according to a survey by TGI Israel between July 2007 and June 2008. Although IDF Radio is a military entity, it is run like a commercial station and does not face additional military censorship.

The station is, however, often under threat of closure because of budget constraints and sentiment among government officials that soldiers should not be tasked to run a radio station

for civilians. Pressure to close the station swelled in the 1980's, but officials yielded to public demand to keep the popular station on the air. The station's budget is estimated at 33 million shekels, roughly half of which is funded by the IDF, with another 14 million shekels coming from outside sources such as infomercials and public service broadcasts (www.nfc.co.il, 26 April 2007).

The station's website at www.glz.msn.co.il offers a selection of the same day's news and interviews, a link to live IDF Radio programs, live video transmissions from the station's studio, traffic updates, broadcasting schedules and frequencies, site search engines, ad hoc Internet polls, links to army information sites for soldiers, links to IDF spokesman's site, university schedules, information on cinema and music, and names of the journalistic and production staff and their e-mail addresses.

5.7.3. Regional Radio Stations

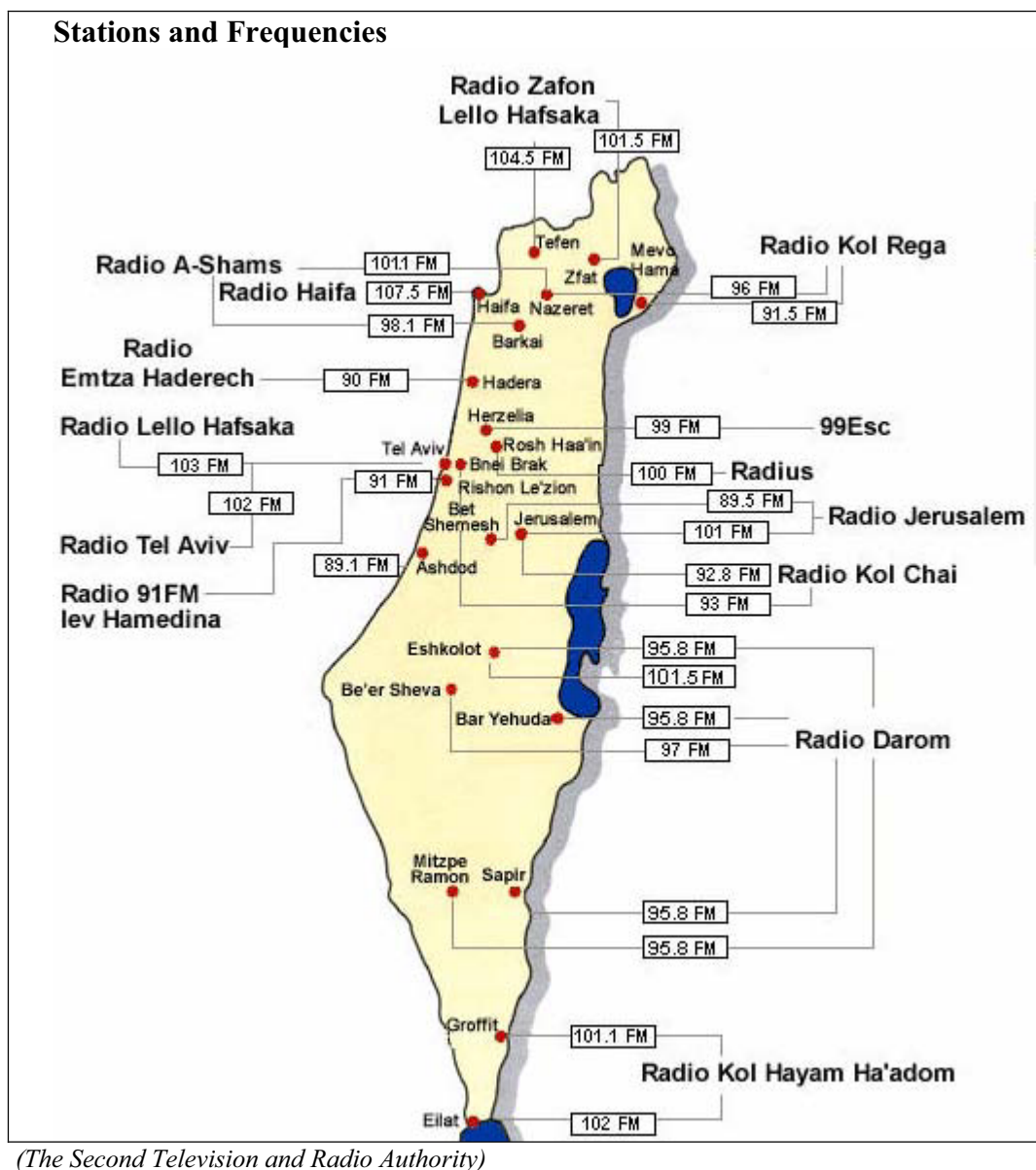
The Second Television and Radio Authority (STRA) Law of 1990 served as the basis for the establishment of 14 regional FM stations in 1996, many of which now also have websites. Of the 14 stations, 13 are in Hebrew, and one is in Arabic in the Galilee. The stations are private franchises financed by the owners' start-up money and subsequently funded through advertising. They provide regional news and information, consumer programs, current affairs, entertainment, and information on local events. Licenses are granted for four-year terms. The STRA can extend the license for another four years without a new tender. In practice, however, the franchisees' licenses were automatically extended until the beginning of 2008, when the STRA, despite opposition by the regional radio stations and some politicians, insisted on issuing new tenders (*TheMarker*, 16 March). The frequencies are allocated by the Ministry of Communications.

After 12 years of broadcasting, most of the regional radio stations reportedly have been able to balance their budgets and return the owners' initial investment. They were able to accomplish this despite the fact that regional radio's share of the media advertising pie dropped to 2.3 percent in 2006, with an income of 120 million shekels (*Ha'aretz*, 16 October 2007).

STRA issued new tenders for six regional radio stations at the beginning of 2008. All bidders were required to deposit a 4-million shekel bank guarantee, to pledge that the station's ownership would remain at least 51 percent Israeli, and to prove that they had never been convicted of a crime of moral turpitude. It is estimated that setting up a regional radio station requires an investment of 4-15 million shekels (*Ha'aretz*, 16 October 2007; *TheMarker*, 15 December 2007).

Despite modest net profits associated with owning a regional radio station, estimated at an average of 1 million shekels a year, the tenders had no shortage of applicants because control of a mass media outlet is a source of political influence, and many Israeli politicians -- both on the local and national level -- view the regional radio stations as an effective way to maintain contact with their constituents (*TheMarker*, 16 March).

An STRA survey for 2006 noted that on an average weekday in December 2006, approximately 1.365 million Israelis over the age of 10 listened to one or more regional radio stations at least once a day (www.rashut2.org.il).



5.7.4. *Pirate Radios*

A prevalent phenomenon in Israel is the proliferation of radio stations operating without a license. In June 2007, there were estimated to be more than 200 unlicensed stations operating in Israel, especially in the Jerusalem and Netanya areas. Under the 1993 Oslo Accords, Israel gave several radio frequencies to the Palestinian Authority. The Palestinians, however, also operate an unknown number of pirate stations whose broadcasts are also received in Israel (www.israelnationalnews.com, 7 June 2007; www.haaretz.com, 21 June 2007).

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In the summer of 2007, the Israeli Communications, Justice, and Public Security Ministries decided to step up their activity against pirate radio stations, after broadcasts (originating from a pirate Palestinian radio station in Ramallah) jammed communications between aircraft and Ben-Gurion Airport's control tower on several occasions, requiring a temporary suspension of flights. Approximately 130 pirate radio stations were closed in 2006, and 50 others were closed in the first six months of 2007 (www.moc.gov.il). In December 2007, the Israeli Government passed a draft resolution defining pirate radio as an "economic crime" and "aerial terrorism" that endangers passengers' security. The communications minister noted "a drastic decline" in pirate radio broadcasts' interference with airport communications following the crackdown and vowed that if the government implemented its plan, the "criminal pirate radio infrastructure could be eradicated within 2 years" (news.walla.co.il, 16 December 2007).

Many of the pirate stations operate out of private homes and provide ethnic and religious programming, while others are commercial and funded by advertising. A very prominent pirate station, Arutz 7, which represented the interests of the Jewish settlers in the territories, was closed on 20 October 2007 for operating without a license. However, the Arutz 7 website in Hebrew, English, Russian, and French is found at www.inn.co.il (the English-language version is found at www.israelnationalnews.com) and continues to operate.

The website carries online live and recorded radio programs and video clips, including news, interviews, commentaries, music, consumer news, RSS feeds, and sports in the four languages. Everything is reported and commented on from the settlers' unique viewpoint. There is a detailed daily broadcast schedule on the website.

The IDF did approve the issuing of a tender for a regional radio station in the West Bank and Gaza Strip. The deadline for submitting applications for the tender was mid-November 2007. Israeli left-wing groups filed suit with the Supreme Court, demanding that the tender be withdrawn and contending that its sole goal was to enable Arutz 7, or other pirate radio stations, to get back on the air (www.israelnationalnews.com, 14 October 2007).

Despite the lawsuit, the STRA chose Radiyosh, controlled by Amihay Zivan Zissholtz (25 percent) and Hevrat Galey Darom (75 percent), as the tender's winner (they were the only applicant) but ruled that its decision is conditional on the security assessment of the IDF's commander in Judea and Samaria and on the Supreme Court's ruling (www.inn.co.il, 28 January). The STRA also ruled that although the broadcasts are aimed at the Jewish settlers, there is no room for the kind of "extremist political preaching" that characterized the Arutz 7 pirate station (www.news-israel.net, 28 January).

6. Market Liberalization of Israeli Telecommunications

In 1984, the regulatory and operational functions in Israeli telecommunications were separated. All telecommunications facilities, which had until that time been government-operated, were transferred to the newly established Bezeq Company. Bezeq was granted a tightly regulated monopoly for the provision of telecommunications services.

In 1994, the first significant step toward a competitive telecommunications market was taken when the incumbent, Bezeq, was required to form subsidiary companies in order to provide services in market sectors other than domestic, fixed wire line telephone service, such as the

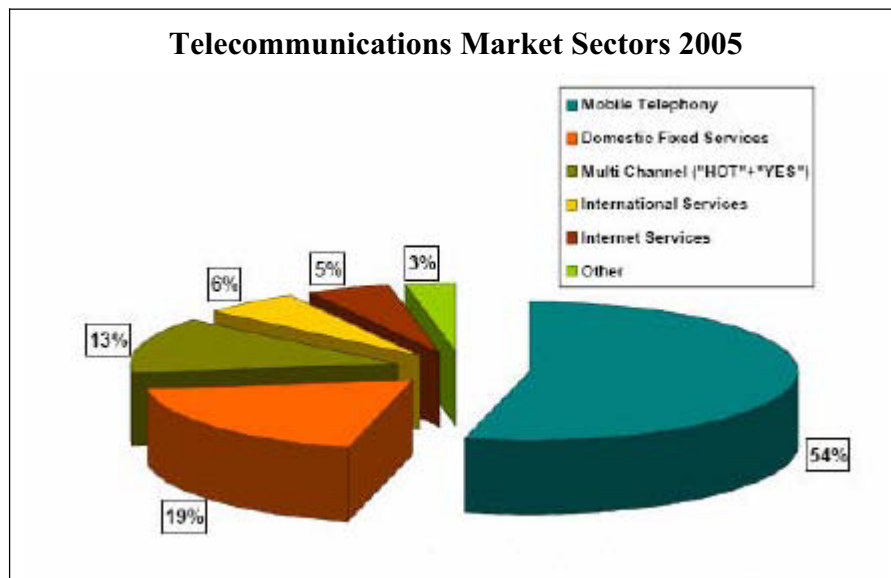
<p>This OSC product is based exclusively on the content and behavior of selected media and has not been coordinated with other US Government components.</p>
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cellular (Pelephone Ltd.) and international (Bezeq International Ltd.) market sectors. By the end of 1994, the cellular market sector became competitive, when Cellcom, the second cellular company in Israel, began operations, after winning a tender issued by the Ministry of Communications. Competition levels increased in 1998, as Partner stepped in (again through a public tender) and in 2001 when MIRS was granted a cellular license. The international telephony and data market saw the entry of competition in 1997 when Barak and Golden Lines began operation. An amendment to the Telecommunications Act in 1997 enabled the licensing of DBS satellite TV service provider, which began operation on July 2000 and competes with the cable corporations in the multi-channel broadcasting market.

Bezeq's exclusive monopoly-by-law on fixed telephone services ended in June 1999. Subsequently, in September 2000, the minister of communications enacted regulations for the licensing of new operators in the fixed services market -- any entity meeting the licensing criteria may receive a license. In February 2001, the ministry issued a tender for the assignment of additional 2G and 3G cellular frequencies. The tender for additional cellular services using 2G or 3G frequencies was concluded successfully, and frequency bands were allocated for future use by the three major mobile telephone operators. Currently, the mobile companies are intensively marketing advanced 3G services which enable, among other things, faster Internet surfing, video chats, and much more.

From Monopoly to Competition: 1994-2006		
Market Sectors	1994	2006
Domestic Fixed Services	Bezeq	Bezeq Hot (the cable companies) 012 Telecom Cellcom Fixed Telecommunications Services Globcall
Mobile Telephony	Pelephone	Pelephone Cellcom Partner Mirs
International Services	Bezeq	Internet Gold Golden Lines Netvision Barak Bezek International Xphone
Multi-Channels TV	Cable companies (Golden channels, Tevel, Matav, Gvanim, Idan)	Hot (cable companies) Yes (satellite company)
Internet Service	Only university networks	Internet Gold Netvision Bezeq International Barak Golden Lines Over 50 smaller ISPs

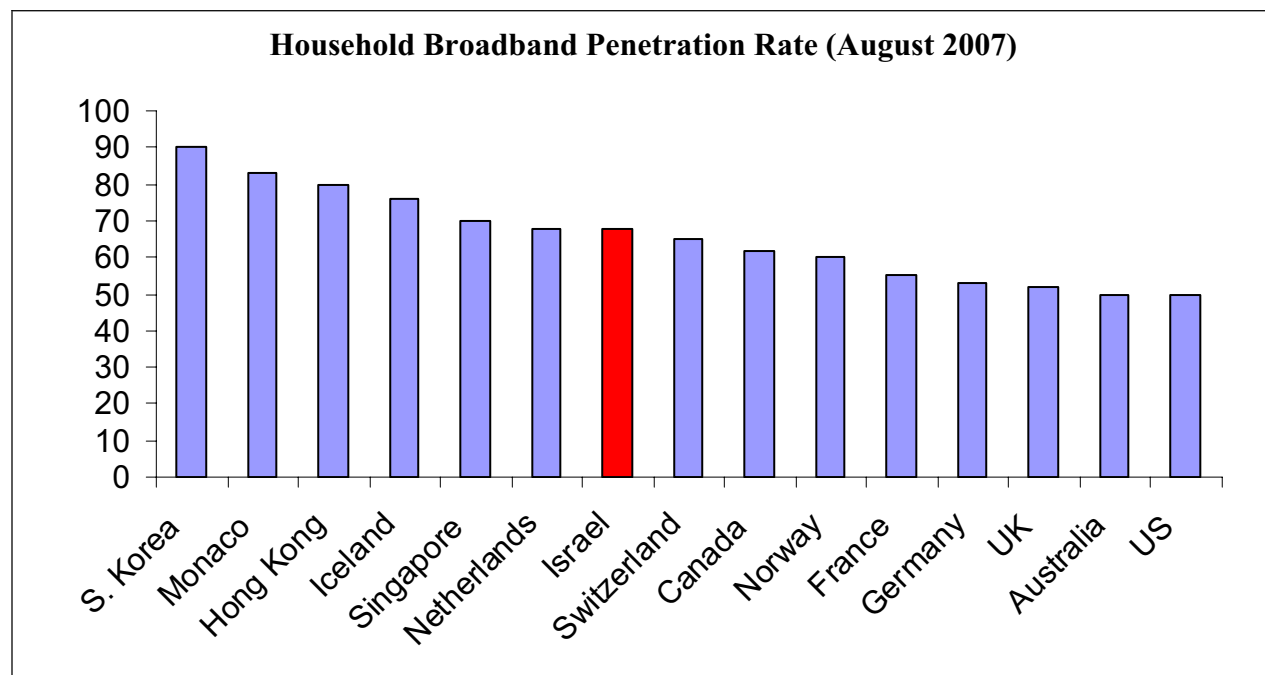
(Israel Ministry of Communications)



(Israel Ministry of Communications)

7. Internet

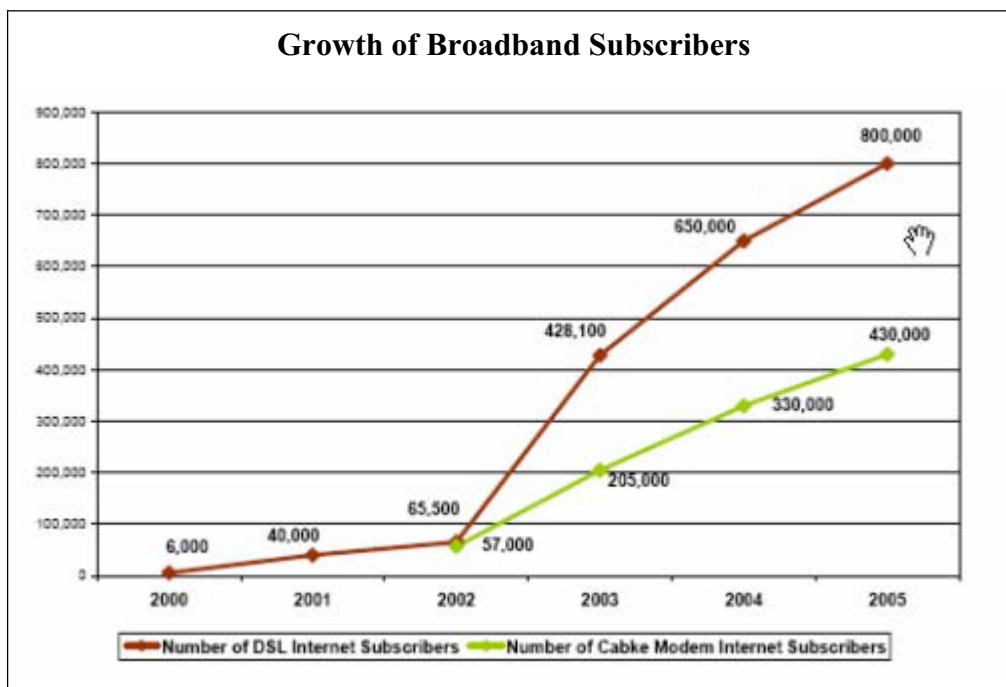
A poll conducted by TNS-Teleseq, which describes itself as "the leading market research and information organization in Israel" (www.tnsglobal.com/global), indicates that there were 4.4 million Internet users over the age of five in Israel -- or over 60 percent of the total population -- as of June 2007. Of these, 900,000 are children and youths between the ages of 5 and 17, with 91 percent of Israeli youths between the ages of 13 and 17 surfing the Internet. The Internet penetration rate is 79 percent between the ages of 18 and 29, 68 percent between 30 and 49, and 45 percent over the age of 50 (www.ice.co.il, 17 July 2007).



(Wall Street Journal)

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Over 60 percent of households and 80 percent of businesses are served by five large and about 70 small Internet Service Providers (ISPs). Some 72 percent of Jewish households are connected to the World Wide Web (compared with 27.8 percent in 2002), and 95 percent of these have either cable or asymmetric digital subscriber line (ADSL) high-speed Internet access (TSN-Teleser survey, June 2007).



(www.moc.gov.il, November 2006)

At the end of 2006, approximately 55 percent of the population (and 72 percent of the over-13 population) was surfing the Internet regularly, with 77 percent of all Israeli Internet users surfing on a daily or almost daily basis, compared with 74 percent in November 2003 (*Ma'ariv* 18 January 2007). This means that three million Israelis over the age of 13 are on the Internet daily. According to a Dun & Bradstreet Israel survey, at the end of 2006, Israel was ranked eighth worldwide in the Internet penetration rate (*Ha'aretz*, 6 December 2007).

A survey carried out by comScore Networks, which describes itself as a "global Internet information provider" to "which leading companies turn for consumer behavior insight" (www.comscore.com), found that Israelis were second only to Canadians in the number of hours they spent on the Internet in 2006. Adult Israeli surfers (over the age of 15) spent an average of 37.4 hours a month on the Internet. In 2005, Israelis spent even more time on the World Wide Web with an average of 57.5 hours a month (www.ynet.co.il, 12 March 2007).

Surveys show that 7 percent of all surfing occurs at home. Some 64 percent surf from work, schools or other academic institutions, and cafes (TIM Survey, June 2007).

When asked which medium they would miss most if deprived of it for a month, 54.1 percent of young Israelis between the ages of 18 and 24 chose the Internet. Among older Israelis over the

age of 55, 20 percent said that the Internet is more important to them than television or radio (*Ha'aretz*, 19 September 2006).

Officially, high-speed Internet in Israel started in 2000, and by 2003 the number of users had tripled and turned the service from a luxury into a mass market commodity. In 2000, Israel was a country in economic recession, with widespread unemployment and zero growth, but was still behind only Hong Kong and South Korea in high-speed Internet penetration, according to an Ernst and Young International survey cited by the Ministry of Communications.

The 2006 Statistics	
The Revenue figures are of 2005	
The Israeli telecommunication service providers market	
General information	
Population	7,707,000
Land area	20,770 sq.k"m
Fixed Services	
Number of domestic telephony operators	2 + 3 (unique domestic operator licenses)
Number of fixed phone lines	2.9 million
Total revenues	\$1,125 million
Percentage of digital telephone network	100%
Home-pass	99%
Number of broadband infrastructure operators	2 (Bezeq and a cable operator, in each region)
Market share of new broadband infrastructure entrants	40% (Bezeq market share- 60%)
Internet & Broadband	
Number of ISP	73 (5 major players)
Number of broadband subscribers	1,230,000 (800,000 ADSL, 430,000 CM)
Broadband penetration	62% of households
Broadband home-pass	99%
Cellular Telephony	
Opening of competition	1995
Number of operators	4
Country coverage	99% of the Israeli population
Total revenues	\$3,130 million
Number of subscribers	7.7 million
Penetration rate	106%
Average ARPU	\$34
Average MOU	320
Date of UMTS spectrum auction	December 2001
Number of UMTS licenses	2
UMTS frequencies band price	\$45 million (per operator)
International telecommunications Services	
Opening of competition	1997
Number of operators	6
Total number of minutes	2.5 Billion (Incoming & Outgoing)
VoIP	Permitted only for licensed operators
Multi-channel TV	
Opening of competition	2000
Number of operators	2
Total revenues	\$800 million
Cable companies home-pass	97%
Number of subscribers	1.4 million
Digital subscribers	89%
Market share of new entrant	39% ("YES"- the DBS operator)

(Israel Ministry of Communications, November 2006)

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The cable companies' recovery from the economic recession and the increased competition among ISPs were part of the fuel feeding this rapid spurt in broadband Internet penetration (*Ha'aretz*, 24 December 2003).

Other factors encouraging this growth include the competition between Bezeq and the cable companies (both are under universal service obligation), competition between five major ISPs, widespread use of computers in businesses and at home -- which cost about the same as in the United States -- advanced telecommunications infrastructure, and a regulatory policy of minimal intervention. Several sophisticated Hebrew-language portals, more than 60,000 web pages, and the online availability of all major local print media also contribute to ubiquitous Internet use in Israel (www.moc.gov.il).

In the competition between Internet line providers, Bezeq International -- a subsidiary of the domestic telecommunications monopoly -- has a sizable lead over the competing cable television firms: approximately 1.1 million ADSL subscribers compared with 590,000 cable modem connections at the end of September 2007 (*Ynet*, 22 November 2007).

7.1. Cost

After a shaky start and high prices, intense competition between the five leading ISPs -- Netvision, Bezeq International, Internet Zahav, Golden Lines, and Baraq (the last four also offer long-distance telephone service) sharply cut monthly rates for high-speed Internet. A standard 1.5 mb connection (with a six-month to one year commitment) offering unlimited access is now available for about \$10 a month. For just a few more dollars each month, the customer doesn't have to sign a contract. Higher-speed connections, reaching up to 5 mb, are more expensive, at around \$40.

Bezeq International, co-owner of Israel's only satellite television company, YES, also offers access to a combined satellite television package and ADSL Internet connection for \$60 a month. The HOT cable company offers its customers similarly priced deals, and for another \$5 dollars a month, it provides a triple play package of television, Internet, and telephone services.

7.2. Israeli Internet Activities

A poll by TNS-Teleseker that was conducted between January and June 2006 shows that Israelis over the age of 13 use the web primarily to send and receive e-mail (99 percent); search for information (96 percent); read political, entertainment, and sporting news online (86 percent); download files or software (76 percent); watch videos (74 percent); use instant messaging services (62 percent); order products and services (60 percent); and play online games (57 percent).

A subsequent TNS-Teleseker poll conducted between July and December 2006 shows an increase in surfers' use of Web 2.0 applications. See the chart below for a breakdown of online activities performed by Israeli web surfers (*Ynet*, 18 December 2006, 23 January 2007):

Israeli Web Surfing Activities

41%	Read talkbacks (readers' or viewers' comments)
22 %	Write talkbacks
38%	Watch user-generated videos
3%	Upload videos
34%	Listen to online radio stations
28%	Participate in Internet forums
26%	Use VoIP (Voice-over-Internet Protocol) services
20%	Watch television online
18%	Read blogs
5%	Write blogs
10%	Upload photos to filesharing sites
7%	Visit online social networks

Ha'aretz reported on the basis of TGI's annual survey between July 2006 and July 2007 that the Internet is continuing to grow as a source of information that rivals the old media, with 47 percent of Israelis saying that the Internet is the first place they seek information, as compared with 39.1 percent who said so between July and December 2005 (*Ha'aretz*, 26 July 2007).

The July-December 2006 survey also does a comparison between the Israeli public's surfing habits in 2005 and 2006, noting the rise in the use of instant messaging services (from 55 percent to 62 percent), e-commerce (41 percent to 55 percent), financial transactions (47 percent to 54 percent), online radio (30 percent to 41 percent), participation in forums/discussion groups (28 percent to 36 percent), and VoIP calls (22 percent to 32 percent).

TNS-Teleseger's Internet survey's semiannual report for June-December 2007 shows that 39 percent of all surfers who are 13-years-old and above are signed up on at least one social network. An analysis of the phenomenon among different population groups shows that the percentage of those who are registered (with a profile) is the same among both men and women -- approximately 39 percent in each gender. The proportion of those who are registered on social networks shows that although most are young and concentrated in the 13-29 age group (52 percent of the surfers in this age group are registered), the phenomenon also exists among surfers aged 50 and above -- 27 percent of this group reported personal profile registration on a social network. The proportion of secular surfers registered is 43 percent; while among those who describe themselves as religious, 26 percent are registered with a personal profile on a social network (*Ha'aretz*, 3 January 2008).

A survey conducted by the Symantec Company, regarding Internet security threats in the first half of 2007, disclosed that Israel is ranked first in the world as a source of malicious activity, with 11 percent of Israeli surfers being directly responsible for web-based attacks or hacker-related activities. Israel is also ranked ninth in the world in the number of "bot computers" or computers that are remotely controlled by hackers (*Ha'aretz*, 24 September 2007).

7.3. *Demographic Profile of Adult Internet Users*

According to a TNS Internet survey conducted between 20 December 2006 and 11 January 2007, the typical Internet user under the age of 50 is still more likely to be a man (54.7 percent) than a woman (45.3 percent), has more years of education than the national average (55.1 percent), and 42.9 percent enjoy a higher than average income.

The ongoing semi-annual surveys by TNS, however, show that the increasing trend for Internet use is gradually blurring the difference between the demographic profile of the average surfer and that of the general population. More women and older people are using the Internet now, as well as 40.3 percent of Israelis with a high school education compared with 39 percent in May 2004 (*Ynet*, 17 January 2007).

A TNS Internet survey conducted between January-June 2008 indicated that the fastest growing sector of Israeli Internet surfers is the over-50 age group, who now make up 29 percent of Internet users, as compared with only 11 percent in 2001 (*globes-online.com*, 9 July 2008).

There are, however, differences in the scope of Internet use between affluent and poorer Israelis, the highly educated and less educated, as well as between Jews and Arabs.

- A Haifa University study found that the percent of Internet users in the Israeli Jewish population increased among income groups earning more per month. See the following chart for details.

Income Per Month	Percentage of Internet Users Among Israeli Jews
< 4,000 shekels	20%
4,000-6,500 shekels	28%
6,500-8,000 shekels	40%
8,000-10,000 shekels	51%
10,000-13,000 shekels	59%
>13,000 shekels	80%

- An Israeli offshoot of the American Internet-2 project, which describes itself as "the foremost US advanced networking consortium" notes the strong correlation between higher education levels, openness to new technology, and use of the Internet. Among Israelis with up to 11 years of education, only 23 percent use the Internet. This percentage rises to 64 percent among Israelis with a full high school education and to 79 percent of Israelis with college-level education and above (www.internet-2.org.il).

- There are different estimates regarding the Internet penetration rate in the Arab sector. Some sources estimate it at between 14-30 percent (*Ma'ariv*, 8 November 2007, 14 January 2006) while others place it as closer to 55 percent (Ifat Business Information Group). The Israeli Internet-2 project estimates the Internet exposure rate among Israeli Arabs as approximately 20 percent less than the exposure rate among Jews (www.internet-2.org.il).

A study conducted by Hadid Communication discovered that as opposed to Jews, Israeli Arabs hardly look for news updates on the Internet, attributing low credibility to Internet news sites and preferring to use it instead for fun, music, or studies. When they do seek out the latest news, they go to Hebrew-language news sites or to *Kull Al-Arab's Panet* website at www.panet.co.il (*The Seventh Eye*).

There are also differences in Internet use between central Israel and peripheral areas. In central Israel, 51 percent of the residents use the Internet as opposed to 46 percent in northern Israel and only 40 percent in the south.

7.4. Educating Israelis on the Internet

Israel has several projects aimed at bridging the digital gap between rich and poor.

1. Tapuah (Apple) is a nonprofit project financed by the leading companies in the business sector, including Bezeq, Baraq, and Netvision. Tapuah operates international technological-educational programs in dozens of communities aimed at developing residents' life skills and reducing the "digital divide" between the residents of central Israel and its periphery. It has established 51 computer knowledge centers in the peripheral areas to provide elementary school children with basic Internet training during the day and remain open in the evening for adult training. Tapuah also operates programs in over 300 schools and community centers and has already provided training to hundreds of thousands of people. Tapuah works together with government ministries, the Jewish Agency which encourages immigration to Israel and strengthens ties between Israelis and world Jewry, and technology companies such as Microsoft, Intel, and Cisco (muni.tik-tak.co.il; www.haaretz.com, 29 March 2007).

2. Lehava (which means "flame" and is also an acronym for "Narrowing the Digital Gap in Israeli Society") is a government project designed to decrease the technological gap in Israel by providing the poorer, less educated, and peripheral population of Israel -- especially those who do not own a computer -- with the basic knowledge needed to operate a computer and to receive information through the Internet. It deploys online experts to improve government and public services by guiding and assisting people in the use of information resources and by establishing a national digital library in Hebrew. Over 40,000 Israeli adults and over 60,000 Israeli children have received free computer and Internet training in the 14 Lehava centers throughout Israel since the project began (linmagazine.co.il, 10 July 2007; ict-hanoi.gov.vn/Israel-Lehava; *Ha'aretz*, 13 July 2004).

3. The Israeli Education Ministry, in conjunction with Bezeq and the HOT cable company, are engaged in a three-year project aimed at connecting Israeli elementary and high schools to high-speed Internet via either ADSL lines going up to a speed of 5 Mbps or cable modem technology offering speeds of up to 6 Mbps, at a discounted monthly cost for the school

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ranging between 68.5 and 95 shekels, excluding installation costs. The project started on 1 July 2007, and any school can decide to join until 30 June 2009. Both Bezeq and HOT are obligated to link any interested school to the Internet within 3 years from the date of their application (cms.education.gov.il).

7.5. *Opposition to the Internet*

Israel's ultra-Orthodox rabbis historically have strongly opposed the Internet because it "leads impressionable young people astray" (*The Jerusalem Post*, 2000). Things appear to be changing, however, in the religious communities. *Ynetnews* has reported that "cracks are beginning to form in the high wall of Haredi Internet-phobia" after the Rabbinical Commission for Media Affairs, established by leading haredi rabbis, published an announcement permitting the use of the Internet "solely for business purposes." The rabbis explained that the need to solve the problem presented by the Internet came from the growing use of computer information systems, e-mail, and the Internet in the business world (*Ynetnews*, 17 December 2007).

People familiar with media consumption trends among the Jewish ultra-Orthodox in Israel say that despite rabbinical prohibitions, tens of thousands of ultra-Orthodox -- approximately 30 percent of households in the sector -- regularly surf Internet forums and news sites (*Ha'aretz*, 2 January 2007). A survey carried out by Dun & Bradstreet showed that at the end of 2006, 25.1 percent of all households in the predominantly ultra-Orthodox city of Bene Beraq were connected to the Internet -- the lowest Internet penetration rate of any Israeli Jewish city (*Ha'aretz*, 6 December 2007).

7.6. *Popular Websites*

The TNS/Teleseker Company carries out biannual as well as monthly surveys of the leading Israeli websites. Its list of the 21 most popular websites in Israel for January-June 2008 shows that international sites such as *Facebook* and *YouTube* have increased their penetration rate at the expense of Israeli sites. The most popular website in Israel is *Google Israel* at google.co.il, which introduced a Hebrew-language version in 2003 and was visited by 90.2 percent of surfers over the age of 13 (news.walla.co.il, 16 July 2008).

The top purely local Israeli site remains the Hebrew-language *Walla Communications Ltd.* portal at www.walla.co.il/, partly owned (27.3 percent) by the Schocken Group, which also publishes the influential daily *Ha'aretz*. Some 67.4 percent of surfers visit the site.

On 14 January 2008, the portal *Walla Communications Ltd.* portal announced the signing of a strategic cooperation agreement with *Yahoo!* on Internet search engines. The agreement will allow the companies to challenge *Google Israel's* three-year domination of the market and provide an alternative to advertisers in the targeted advertising market.

As part of the agreement, "*Walla* will now be able to use *Yahoo's* search engine, giving *Walla* access to one of the world's largest online databases, including searches in Hebrew, English and other languages" (*The Jerusalem Post*, 15 January).

Ynet.co.il, a news site operated by the largest circulation newspaper group *Yedi'ot Aharonot*, is the most popular news site and the third most popular website altogether (59.7 percent); fourth

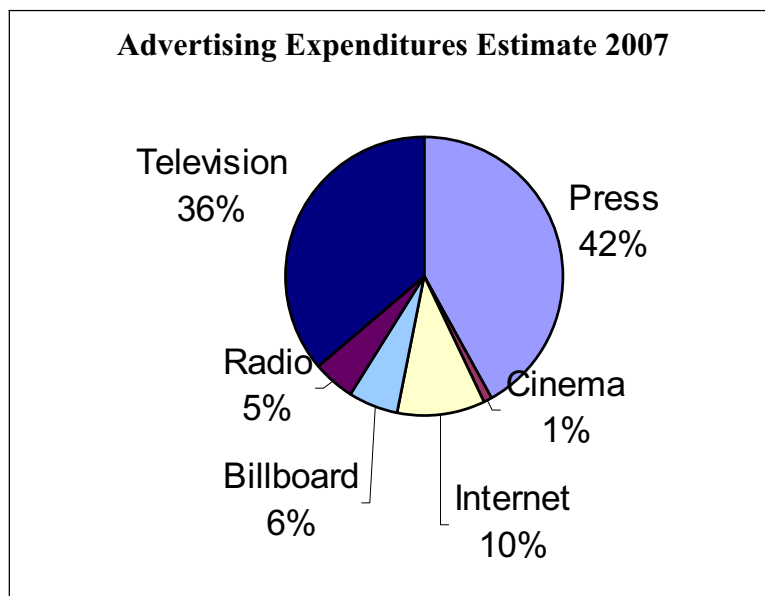
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is *YouTube* (34.1 percent); fifth is the Hebrew portal at Nana10.co.il (32.7 percent); msn.co.il is sixth (29.9 percent). Nrg.maariv.co.il, which belongs to *Ma'ariv*, Israel's second largest independent daily newspaper, is the second most popular news site and the seventh most popular site altogether (26.6 percent). See the chart below for the most popular websites among Israeli web surfers.

Most Popular Websites	Percent of Surfers Viewing the Site
Google Israel	90.2%
www.walla.co.il/ <i>Local Israeli, Hebrew-language portal for Walla Communications Ltd., partly owned by the Schocken group</i>	67.4%
Ynet <i>News site operated by the largest circulation newspaper group Yedi'ot Aharonot</i>	59.7%
YouTube	34.1%
Nana10 <i>Hebrew portal</i>	32.7%
msn.co.il	29.9%
Nrg.maariv <i>Website of Israel's second largest independent daily newspaper</i>	26.6%
yad2.co.il	24.8%
Facebook	24.7%
zap.co.il	24.0%
d.co.il	21.6%
tapuz.co.il	20.4%
one <i>Sports site</i>	17.1%
Yahoo	14.2%
orange <i>Cellular phone company website</i>	14.1%
themarket <i>Schocken group's online business paper</i>	13.6%
sport5.co.il	13.3%
haaretz.online <i>Website of the daily newspaper Ha'aretz</i>	12.8%
keshet <i>Website of the Channel 2 franchise</i>	12.8%
Globes [online] <i>Website of the Globes business daily</i>	12.4%
reshet <i>Second website of the Channel 2 franchise</i>	10.7%

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7.7. Internet Advertising



(Advertisers Association and Ifat)

Online advertising expenditures totaled approximately \$90 million in 2007, a 38.5 percent rise over 2006, and are expected to reach \$160 million in 2008, according to figures compiled by the Advertisers Association of Israel and the Ifat Information Company.

Google took the largest slice of the online advertising expenditure with \$42 million, and *Walla* was second with \$25 million. The growth of online advertising dovetailed with an 8.3 percent rise in overall advertising expenditure in 2007, the highest growth in recent years. For the first time, the Internet accounted for 10 percent of all advertising expenditure in 2007 (*Ha'aretz*, 8 January).

7.8. Political Websites

Most major Israeli parties, such as Qadima, Likud, Labor, SHAS, Yisra'el Beytenu, Meretz, and the NRP maintain websites. Israeli MKs, including President Shim'on Peres, Likud Chairman Binyamin Netanyahu, Minister Avigdor Lieberman, Qadima MK Tzahi Hanegbi, National Union MK Beni Elon, and Labor Party MK Efrayim Sne, among others, have personal websites or blogs, some hosted by major Israeli Internet portals. Other sites occasionally appear before Knesset elections but die out soon afterward.

7.9. Domain Names

Israel's country code in top-level domains is ".il." Until 2007, the Israeli Internet Association (IIA) was exclusively responsible for registering domain names. Today, there are four other accredited registrars: Interspace Ltd.; Domain, The Net Technologies; LiveDns Ltd.; and Communigal Communication Ltd. In January 2008, there were 113,948 registered domain names, according to the IIA. The allocation of a domain name by the IIA costs \$60 for two years, while the other accredited registrars charge between \$16.95 and \$17.99 a year. Most domain names end in co.il, which are reserved for commercial applications, or org.il. Certain

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domain names are granted only by the IIA: the net.il extension, which also requires a license from the Ministry of Communications; the k12.il extension, reserved for primary and secondary schools; and the ac.il extension, which is reserved for universities.

7.10. Internet Technology

Israel ranked 25th in the first global Digital Access Index (DAI) on Information and Telecommunication Technology (ICT) carried out by the International Telecommunication Union in 178 countries in 2002. The DAI "combines eight variables, covering five areas, to provide an overall country score. The areas are availability of infrastructure, affordability of access, education level, quality of ICT services, and Internet usage" (www.itu.int/home/index.html). Israel ranked third in the world in mobile cell phone subscriptions with 95.5 per 100 inhabitants.

The World Economic Forum ranked Israel 18th out of the 122 countries in its 2005 Networked Readiness Index, a comparative and benchmarking framework developed at Institut Européen d'Administration des Affaires (INSEAD) to capture the state of technology readiness in 122 countries worldwide (GITR-Home).

Israel is considered a world leader in developing Internet technologies and applications. This international reputation is also evident in the domestic market and influences local interest and use. The country's strong tradition of academic inquiry and research has placed Israel on the global research network for the NGI (Next Generation Internet), linking Israel to the "world's seekers of scientific and industrial knowledge such as the US-Internet 2 Network, the EU GEANT Network, and Q-Med (Mediterranean Consortium Quantum Extension)" (www.moc.gov.il).

7.11. Internet-Related Laws, Regulations

7.11.1. Copyright Act of 1911

This law applies to the protection of the ownership of an original work. Israel, which inherited the British tradition of "Crown" copyright, adjusted to "State" copyright when it became independent in 1948. State copyright gives the government ownership rights to all its publications. The International Federation of Library Associations and Institutions notes that "in spite of many recommendations over the years to cancel or at least restrict state copyright by Israelis as well as by interest groups abroad, it still exists in Israel for both print and electronic formats." As a result, all Israeli Government websites carry copyright warnings. The issue of State copyright was also addressed in a report of the Subcommittee for Computerized Communication and Information, better known as the Eitan Report. Section 7(1) of the Eitan Report recommends establishing government databases for the dissemination of information, which will allow citizens free access to information and effectively revoke State copyright (www.ifla.org).

The Israeli Knesset is still discussing a draft copyright law that attempts to address many current issues, especially digital copyright.

Section 3 of Israel's Commercial Torts Law deals with the relationship between trademarks and Internet domain names, and Israeli courts have on a number of occasions ruled in favor of the

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registered trademark owners against individuals who have purchased identical domain names, notably in the case of the Domino's Pizza chain and Amdocs.

7.11.2. Defamation Law 1965

In November 2001 an Israeli court ruled that Internet publishers are liable under the Defamation Law because it considered an Internet site to be a newspaper, despite the fact that the original law defines a newspaper as printed matter reproduced on a printing press (www.law.co.il/).

The Ministry of Justice set up a special committee to look into the legal problems associated with the Internet and issued an interim report in March 2003. The committee reviewed the issues of consumer protection, responsibility of ISPs for content by a third party, protection of privacy on the Internet, and protection of privacy of minors using the net. In most cases, the committee found that the existing laws were sufficient and that there was no need for special legislation to cover the Internet (www.justice.gov.il/mojeng).

7.11.3. Pending Legislation To Reveal Talkbackers' Identities, Limit Access to Adult Content

On 13 January 2008, the Ministerial Committee on Legislation approved a bill holding website owners or editors legally responsible for any content on their site, including comments made in talkbacks and message boards. According to the bill, websites could be absolved of liability for such comments if they agree to make the posters' details available to authorities upon request. While the bill still needs to be approved in three readings in the Knesset plenum, receiving the support of the Ministerial Committee on Legislation gives it a much higher chance of passing into law.

According to the bill, Internet websites would be defined as a newspaper, and all those who wish to respond would be exposed to lawsuits and even criminal prosecution. While the website's editor and owners would also be legally responsible, they would be absolved of liability if they agree to provide the poster's details to authorities, as well as to plaintiffs in civil suits. Israeli courts can already order websites and Internet service providers to reveal posters' technical details, such as their IP address (www.haaretz.com, 13 January; www.jpost.com, 13 January).

On 28 February 2008, the Knesset approved the preliminary reading of a draft law that would require that ISPs filter pornographic content unless a user specifically requests to not have such content filtered. Such a request would require identification of the user and proof that he/she is over the age of 18 (www.ynet.co.il, 28 February). Much concern has been expressed regarding privacy issues for those who would give such information in order to enjoy unfettered use of the Internet (www.ifla.org).

8. News Sites/Publications



www.iaf.org.il -- *Bit'on Heyl Ha'avir*, Israel Air Force magazine published in Tel Aviv; in Hebrew.



www.debka.com -- Jerusalem-based independent, sensationalist, electronic newsletter focusing on international terrorism, security affairs, and espionage. Includes a weekly supplement (*DEBKA-Net-Weekly*) that is e-mailed to subscribers only; in English and Hebrew.



www.globes.co.il -- Rishon Leziyyon-based independent daily focusing on business and financial news; in Hebrew and English.



www.haaretz.com/ -- Tel Aviv left-of-center, independent daily of record; in Hebrew and English.



www.hazofe.co.il -- Tel Aviv-based daily organ of the right-of-center National Religious Party (NRP); in Hebrew.



glz.msn.co.il/ -- IDF Radio's site, carrying breaking news, sports, music, and other programs; in Hebrew.



www.imra.org.il -- Kefar Saba-based organization, providing news updates on Israel with a right-of-center slant; in English.



www.news-israel.net -- Website of Inyan Merkazi, an independent online newspaper with a secular, sensationalist slant, published in Rishon Leziyyon; in Hebrew.



www.jpost.com/ -- Right-of-center, independent daily published in Jerusalem; in English.

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www.jrep.com -- Independent bi-weekly magazine published in Jerusalem covering Israel, the Middle East, and the Jewish world; in English.



makorrishon.co.il -- *Maqor Rishon*, a right-of-center weekly published in Petah Tiqva; in Hebrew.



www.menewslines.com -- Independent subscription-based daily news service in Jerusalem focusing on strategic issues in the Middle East; in English.



meria.idc.ac.il -- Publication of the Global Research in International Affairs (GLORIA) Center, affiliated with the Lauder School of Government, Diplomacy, and Strategy at the Herzliyya Interdisciplinary Center, a privately funded university; in English.



www.nrg.co.il/online/HP_0.html -- News portal launched in June 2004 by the Ma'ariv Group as a counterweight to *Ynet*, Israel's leading news portal owned by Yedi'ot Aharonot. Content on the website is slightly different than hardcopy version, with an additional independent set of journalists; in Hebrew.



www.themarker.com -- Tel Aviv-based online magazine published by the Schoken Group focusing on hi-tech, Internet, and financial issues; in Hebrew and English.



www.ynet.co.il/ -- Israel's most popular Hebrew-language news portal operated by the Yedi'ot Media Group.



www.ynetnews.com/ -- Israeli news portal run by Yedi'ot Media Group; in English.



www.nfc.co.il/ -- Petah Tiqva-based website run by prominent investigative journalist Yo'av Yitzhaq.



news.google.com/news?ned=iw_il -- Website constantly searching and updating news from 100 news sites; in Hebrew.

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rotter.net/ -- Website offering RSS news feeds; famous for its forums on which private citizens have posted breaking news and exposes; in Hebrew.

9. Commercial Television Stations



10tv.nana10.co.il/ -- Website of Tel Aviv Israel 10 Television -- commercial television, independent in content; also serves as the nana portal for news, business, tourism, shopping, sports, culture -- in Hebrew.



www.keshet-tv.com/ -- Website of Tel Aviv-based Channel 2 Television franchisee Qeshet -- commercial, independent in content -- in Hebrew.



www.reshet.tv// -- Website of Tel Aviv-based Channel 2 Television franchisee Reshet -- commercial, independent in content -- in Hebrew.



www.omedia.co.il/ -- Right-leaning news site with international, regional, and domestic news as well as analyses; in Hebrew. *Omedia* runs an English-language version at www.omedia.org/.

10. Portals



www.d.co.il -- *Yellow Pages*, price comparisons, shops, shopping tips; in Hebrew and English.



www.Goop.co.il -- Chat rooms, forums, blogs, shopping, computer programs, dating services, weather, and links to numerous browsers; in Hebrew.



www.IOL.co.il -- News, sports, business, culture, forums, shopping; in Hebrew.



www.nana.10.co.il -- News, business, tourism, shopping, sports, culture; also serves as the website of Israel 10 Television -- in Hebrew



www.one.co.il -- Self-proclaimed "Israel's sports portal"; in Hebrew.



www.start.co.il -- News, sports, business, tourism, links to numerous browsers; in Hebrew.



www.tapuz.co.il -- News, sports, blogs, chat rooms, computer programs, books, travel, shopping; in Hebrew.



www.walla.co.il/ -- News, sports, culture, business, food, tourism; in Hebrew.



www.msn.co.il/ -- News, sports, culture, business, food, tourism; in Hebrew.



www.bizportal.co.il/ -- Hebrew-language website focusing on local and international business news.

11. Government Sites



www.mof.gov.il -- Official site of the Finance Ministry in Jerusalem; in Hebrew and English.



www.mfa.gov.il -- Official site of the Foreign Ministry in Jerusalem; in Hebrew and English.

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www.pmo.gov.il -- Official press releases of Israeli Government Press Office (GPO); in Hebrew and English.



www.iba.org.il -- Official site of the Israel Broadcasting Authority (IBA) carrying newsflashes, weekly radio and television programs, frequencies; in Hebrew.



dover.idf.il -- Official site of the IDF spokesman's office in Tel Aviv; in Hebrew and English.



www.knesset.gov.il/ -- Official site of the Knesset, Israel's parliament in Jerusalem, providing information on latest legislation, discussions of committees; in Hebrew, English, and Arabic. Live broadcasts of Knesset proceedings can be viewed at www.knesset.gov.il/broadcast/heb/BroadcastScreen.aspx.



www.pmo.gov.il -- Official website of the Israeli Prime Minister's Office in Jerusalem; in English.



www.seamzone.mod.gov.il/ -- Defense Ministry site describing purpose, route, and concept behind the security fence project; in Hebrew.

12. Right-Wing/Settlers' Sites



go.ariel.muni.il/ariel/en/ -- Website of Ari'el Radio, broadcasts from Ari'el in the West Bank; in Hebrew and English.



www.a7.org -- Arutz 7, settler news service based in Bet El; in Hebrew, English, and Russian.



www.ateret.org.il/ -- Official Website of Ateret Kohanim Yeshiva headed by Rabbi Shlomo Aviner and founded in 1978 by Jewish settlers to create a presence in Jerusalem's Muslim Quarter; in English, Hebrew, German, and French.



www.gamla.org.il/english/ -- Gamla, Jerusalem-based right-wing settler organization site dedicated to Israeli retention of the West Bank and Golan Heights; in Hebrew and English.



www.hebron.org.il -- Hebron Press Office, news service of the Hebron settlers; in English.



www.kahane.org -- Self-proclaimed "official Kahane website" with links to host of right-wing sites (carries "terror designated website" caption); in English, Hebrew, and Russian.



www.manhigut.org -- Jewish Leadership: website operated by right-wing activist Moshe Feiglin, leader of the Jewish Leadership and Zo Artzenu movements; in English, Hebrew, and Russian.



www.pmw.org.il/ -- Right-wing Israeli organization monitoring the Palestinian media for incitement; in English.



www.professors.org.il/ -- Professors for a Strong Israel, Jerusalem-based right-wing organization of academics opposed to the Oslo process; in English, Hebrew, and Russian.



www.templeinstitute.org/main.htm -- Jerusalem-based right-wing, religious organization dedicated to the building of the Third Temple; in English.



www.templemountfaithful.org/ -- Jerusalem-based right-wing Jewish organization dedicated to the building of the Third Temple and "the liberation of the Temple Mount from Arab (Islamic) occupation"; in English.



www.projectshofar.org/ -- Voice From Hebron, website operated by spokesman of Qiryat Arba Yeshiva, representing right-wing settler views; in English.



www.womeningreen.org/ -- Jerusalem-based right-wing women's organization "dedicated to the security and Jewish heritage of historic Israel"; in English.



www.yesha-israel.com/index/home/ -- YeshaNews: news and commentary from a pro-settler perspective; in Hebrew.



samsonblinded.org/blog/ -- website operated by "Obadiah Shoher," a pen name for a USSR-born "veteran politician," calling for action against Arabs and the Israeli left and citing Rabbi Kahane as a model; in English, Russian, and Hebrew.

13. Left-Wing Sites



www.bitterlemons.org -- Website hosted by Palestinian and Israeli peace process proponents to provide a platform for the exchange of ideas on key issues of concern; in English, Hebrew, and Arabic.



zope.gush-shalom.org/index_en.html -- Tel Aviv-based nonpartisan, left-wing organization founded by peace activist Uri Avneri; in English, Hebrew, and Arabic.



[/icf.org.il](http://icf.org.il) -- Tel Aviv-based website, founded in August 1999 as an alternative to the Communist Party of Israel; in English, Hebrew, and Arabic.



www.peacenow.org.il/ -- Website of the left-wing Peace Now movement; in English and Hebrew.

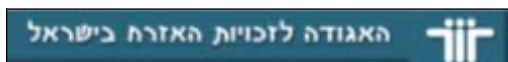


www.ariga.com/peacewatch -- Op-Ed pages of the Rehovot-based PEACE Mid-East Dialog Group, a nonpartisan Palestinian-Israeli group "committed to peace and neighborly relations;" in English.



www.yeshgvul.org/ -- Yesh Gvul, Jerusalem-based peace movement supporting IDF soldiers who refuse assignments or orders for reasons of conscience; in English, Hebrew, Arabic, French, German, Italian, and Japanese.

14. Human Rights Sites



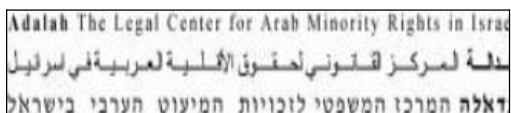
www.acri.org.il/ -- ACRI (Association for Civil Rights in Israel), Jerusalem-based nonpartisan organization dedicated to protecting human and civil rights in Israel and the territories; in English, Hebrew, and Arabic.



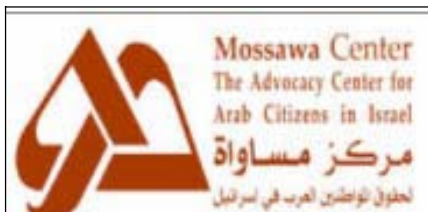
www.adva.org/ -- Tel Aviv-based Adva is a non-partisan, action-oriented Israeli policy analysis center founded in 1991 advocating policy changes that favor disadvantaged groups in Israel; in English, Hebrew, and Arabic.



www.btselem.org -- Jerusalem Betzelem -- independent Israeli information center for human rights in the "occupied territories"; in English, Hebrew, and Arabic.



www.adalah.org -- Shefar'am Adalah in English -- official website of Adalah, the legal center for Arab minority rights in Israel; in English.



www.mossawacenter.org/ -- Haifa Musawah -- independent, nongovernmental organization advocating the civil and minority rights of Israeli Arabs; in English, Hebrew, and Arabic.



www.phr.org.il/phr/ -- Tel Aviv-based Physicians For Human Rights-Israel was founded in 1988 with the goal of struggling for human rights, in particular the right to health in Israel and the occupied territories; in English, Hebrew, and Arabic.



www.bimkom.org -- Jerusalem-based Bimkom-Planners for Planning Rights was established in May 1999 to strengthen the connection between human rights and spatial planning in Israel; in English, Arabic, and Hebrew.



www.yesh-din.org -- Tel Aviv-based volunteers who have organized to oppose the continuing violation of Palestinian human rights in the occupied Palestinian territory; in English, Arabic, and Hebrew.



www.kavlaoved.org.il -- Kav LaOved (Worker's Hotline) is a nonprofit nongovernmental organization committed to protecting the rights of disadvantaged workers employed in Israel and by Israelis in the occupied territories, including Palestinians, migrant workers, subcontracted workers, and new immigrants; in English, Arabic, and Hebrew.

15. Political Parties



www.avoda.org.il -- The Labor Party's Knesset members, political platform, history; in Hebrew.



www.maki.org.il -- Official site of the Israeli Communist Party, MAKI-HADASH; in Hebrew and English.



www.likud.org.il -- General information about the Likud, its chairman, and institutions; in Hebrew and Russian.



www.kadima.org.il/index -- General information about the Qadima Party, its institutions and MKs; in Hebrew.



www.shasnet.org.il -- General information about the SHAS movement and religious issues; in Hebrew.



www.yachadparty.org.il -- Yahad's party news, activities, and political platform; in Hebrew.



www.beytenu.org.il/ -- Yisra'el Beitenu party news, activities, and platform; in Hebrew, English, and Russian.



www.leumi.org.il -- National Union-NRP news; in Hebrew, English, French, and Russian.



www.balad.org -- National Democratic Assembly website; in Arabic, Hebrew, and English.



www.moledet.org.il/ -- News about and political platform of the Moledet Party; in Hebrew, English, and Russian.