



A QUIET OPENING

North Koreans in a Changing Media Environment

Nat Kretchun
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ABOUT INTERMEDIA

InterMedia (www.intermedia.org) is a consulting group with expertise in applied research and evaluation. We help clients understand, inform and engage people worldwide – especially in challenging environments. InterMedia has offices in Washington, D.C., London, U.K. and Nairobi, Kenya.

We work with clients active in international development, global media and strategic communication to understand how people gather, interpret, share, and use information from all sources and on all platforms.

We provide actionable data, analysis, guidance and impact assessments for strategies focused on:

- engagement
- behavior change
- content delivery to target audiences
- the use of communication technologies for social good

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EXECUTIVE SUMMARY

[North Korea] has changed a lot. The level of consciousness has increased, about everything from what we eat to what we think.... Media from outside is definitely causing things to change.

– 26, Female, Pyongyang, Left NK January 2010

NORTH KOREA'S MEDIA ENVIRONMENT IS CHANGING

North Korea is consistently ranked by Freedom House and Reporters Without Borders as the country with the least free media in the world. This ranking reflects the country's complete lack of an independent domestic media, its legal restrictions against accessing foreign media and the harsh punishments it metes out against citizens who violate those restrictions. Yet, since the late 1990s the information environment in North Korea has undergone significant changes. Although the media environment remains extremely restricted by international standards, North Koreans' access to outside media has grown considerably over the past two decades. Many inside the country continue to develop new ways to access information while avoiding the ever-present risk of detection and punishment.

As this research report will show, North Koreans today are learning more about the outside world than at any time since the founding of the country. As the information environment opens, the North Korean government no longer maintains a total monopoly over the information available to the population and, as a result, North Koreans' understanding of the world is changing. This report examines the changes occurring in the North Korean information environment today and the significant effects these changes are beginning to have on the North Korean people. This study systematically demonstrates the relationship between North Koreans' outside media exposure and more positive perceptions of the outside world.

EXAMINING THE FINDINGS

An assessment of the current state of the media environment in North Korea suggests that substantial numbers of North Koreans are able to access various forms of outside media. This includes foreign TV, foreign radio, and most prevalently, foreign DVDs, which are brought into the country from China by cross-border traders and smugglers. Each of these media types has a unique set of characteristics, from foreign radio broadcasts, which deliver "real-time" content to listeners in North Korea every evening, to South Korean DVDs, which provide compelling and credible portrayals of South Korea's material affluence and personal freedoms. While there are still many North Koreans without direct access to foreign media, the number of North Koreans who do have access appears to be steadily increasing and those with the greatest ability to access outside information, such as elites and border residents, boast an increasingly well-informed and nuanced understanding of the outside world based on multiple sources.

In addition, the increase in direct media access has been accompanied by an increasing willingness among North Koreans to share information with those they trust – for the majority of North Koreans word of mouth is the most important source of information. While punishments for accessing outside media or talking about sensitive information remain severe, enforcement is irregular, bribes often allow one to avoid punishment and far fewer North Koreans appear to be reporting on each other than before.

IMPACT OF MEDIA EXPOSURE

One of this study's key findings – that a strong relationship exists between outside media exposure and positive perceptions of the outside world – is clear evidence that the influx of outside media is contributing to a more aware North Korean citizenry.

Positive perceptions of the outside world can call into question many of the North Korean regime's most central propaganda narratives, which legitimate the regime by portraying it as the country's protector from hostile outside forces. While the analysis did not reveal a strong correlation between outside media access and perceptions of the North Korean regime directly, qualitative research findings suggest that North Koreans make natural comparisons between their own lives and their perceptions of the outside world, particularly South Korea. The robust relationship between outside media exposure and improving views of the outside world is compelling evidence of a cycle through which exposure to outside information reinforces changing views about the outside world, which in turn leads North Koreans to seek out more outside information.

These findings suggest there is a role for outsiders to play in encouraging and catalyzing the changes naturally occurring in the media environment by promoting greater access to information for North Korean citizens. While the fine points of strategy can and should be debated, the potential influence of programs designed to equip North Koreans with more sources of useful, objective information is clear.

FOREIGN RADIO BROADCASTING

In addition to analyzing the general media environment, this report places special attention on foreign radio broadcasting, as the U.S. government both directly and indirectly sponsors multiple radio broadcasts targeting North Korean audiences.

Radio is not the most widely consumed source of foreign media, nor does access appear to be growing at the rate of newer media such as DVDs. However, radio occupies a unique space in the North Korean media environment, as the only real-time, direct source of sensitive outside news available nationwide. From the perspective of those attempting to deliver outside information, the relative speed and ease of disseminating content into North Korea from abroad, via radio, gives broadcasting a distinct distribution advantage over other media types that must be smuggled into the country.

Furthermore, there appears to be little substitution among radio users who begin using other forms of foreign media such as DVDs. Radio listeners by and large continue to listen to the radio even after they begin consuming other types of foreign media.

This study also finds that North Koreans appear to be expressing more media content preference than in the past. As North Korea is a highly stratified society and qualitative research findings suggest significant differences in the radio content preferences of elites and non-elites, the radio market appears sufficiently developed to support some niche broadcasts that target specific segments of the North Korean population. Although likely to remain limited in its potential reach, radio remains a strategically important tool for delivering information to North Korea.

THE “ELITE” AND INFORMATION TECHNOLOGY

This report also examines North Korea’s “elite” and the entrance of new technologies into the North Korean media landscape. While the elite can be difficult to define in North Korea, those with political and economic influence are obvious targets for programs promoting media freedom. Due to their better political standing and greater financial means, elites generally enjoy access to more types of media and often have more time and freedom to devote to obtaining outside information. Elites also are generally more discriminating content consumers, however, and attempts to reach them will most likely require a greater degree of targeting.

Advanced media technologies such as mobile phones, computers, MP3 players and USB drives, have begun to make their way into North Korea in substantial numbers, particularly among the elites. The spread of illegal Chinese mobile phones along the North Korean border has made direct person-to-person contact with the outside world possible, and has greatly increased the efficiency of cross-border trade and person-to-person information flow. While still limited to those with financial means, computers and USB drives have made foreign content easier to conceal and share. These devices are difficult for authorities to monitor and allow those who possess them access to new forms of outside information.

WHAT NOW? OPPORTUNITIES GOING FORWARD

What do the changes occurring on the ground in North Korea mean both for those in the country experiencing the changes firsthand and for those outside the country with an interest in the future of North Korea?

The information North Koreans are receiving is in itself important. The more vital and more interesting transformation, however, is occurring in the country’s overall information environment. The significance of these wide-angle developments surpasses the particularities of the specific information exchanges that they allow.

These changes are creating greater space between North Korean citizens and their leaders, and between the regime’s portrayal of North Korea and the prevailing reality on the ground. The activities through which North Koreans access outside information – watching foreign DVDs, listening to foreign radio, talking to one another about information they have heard, buying sensitive media devices in the market – are all illegal and thus done away from the watch of the state. These behaviors are becoming more widespread and more normalized. While the letter of the law has actually become stricter with regard to accessing outside information, North Koreans are increasingly finding ways to negotiate around these restrictions and obtain outside information. The act of accessing information contributes to the normalization of prohibited behaviors in North Korea.

Outside information and the activities North Koreans engage in to access it also are fostering the creation of horizontal connections between North Korean citizens. These horizontal bonds, facilitated by shared implication in prohibited behaviors, economic interactions, or simply curiosity about the outside world, and created outside the watch of the state, are a breeding ground for ideas that go beyond or run counter to the regime’s espoused reality. In these most nascent seeds of civil society lies the potential for continued change on the ground level in the lives of ordinary North Koreans.

While the changes in the information environment documented in this report remain very small by international standards, and there is little hope of any significant pushback against the regime from the ground up in the short term, they are illustrative of a potential long-term trajectory for change. Although the regime can and will likely continue to crack down on the influx of outside information, it seems true retrenchment is not possible. South Korean entertainment

media will continue to enter through traders moving back and forth across the border, and the U.S. government and others will have the opportunity to provide important information about the outside world not supplied by the market. Even the modest de facto liberalization in the information environment occurring in North Korea currently, in tandem with other developments such as increasing marketization, is improving the lives of ordinary North Koreans while at the same time laying the groundwork for a more open North Korea.

FOCUS OF THIS REPORT

This study assesses levels of access to outside information within North Korea based on research conducted among North Korean defectors, refugees and travelers, as well as outside media content analysis and expert interviews. Survey samples of refugees and defectors are not statistically representative of the home population of North Korea and generally contain a disproportionate number of respondents from the provinces bordering China. Interpretation of all statistics contained within this report should be undertaken only with these caveats firmly in mind. The primary focus of the study was on the ability of North Koreans to access outside information from foreign sources through a variety of media, communication technologies and personal sources. The relationship between information exposure on North Koreans' perceptions of the outside world and their own country was also analyzed.

INTRODUCTION

For more than half a century, North Korea has relied on an information blockade as one of its most important control mechanisms. Great efforts have been made by the Democratic People's Republic of Korea (DPRK) regime to control exactly what information North Koreans have access to and how narratives around that information are constructed. This gives the North Korean leadership the ability to present their people with the picture of the outside world and their own country's place in it that most suits their ruling needs. A sense of fear and distrust of the outside world, against which the regime is the only protection, has been used as a form of control by many repressive regimes, and North Korea has proven expert at wielding this tool. In this environment, the North Korean leadership created one of the most powerful personality cults the world has ever seen. This strategy of fear, isolation and unquestioning subservience has contributed to the regime's ability to remain in power against all odds and long beyond what most experts believed possible.

North Korea remained effectively sealed even as most similarly isolated regimes fell or began processes of opening and reform. It was only in the late 1990s, when famine impaired the authorities' ability to enforce the blockade and the people's hunger drove them to search for ways to survive outside the public distribution system, that the sterile information environment in North Korea began to erode. The process continues today. In 2012, North Koreans can get more outside information, through more types of media, from more sources, than ever before – and they are less fearful of sharing that information than ever before. Despite the incredibly low starting point, important changes in the information environment in North Korean society are underway.

The vast majority of research on North Korea, however, is focused on the political leadership at the pinnacle of North Korean society. When analyzing a society as centrally managed and hermetically sealed as North Korea's, it is natural and necessary to speculate about the political calculations of the ruling few. But North Korea is far more than the ruling elite in Pyongyang. As a result of rapidly developing informational and social trends, the regime's attempts to survive will have to be made amid the calculus of an evolving domestic environment. Yet, with the notable exception of work by a select few U.S.-based scholars such as Marcus Noland and Stephan Haggard,¹ and a handful of South Korea researchers, surprisingly little systematic research on the evolution of conditions on the ground in North Korea is publically available.

This study, and InterMedia's research more broadly, addresses this void. The research examines the transformation of the North Korean information environment across all levels of society, as well as what information North Koreans can gain access to and what effect that information has on those who access it.

In an effort to better understand the current state and future prospects of the North Korean information environment, the U.S. Department of State's Bureau of Democracy, Human Rights, and Labor commissioned InterMedia to conduct a DPRK media assessment. "A Quiet Opening: North Koreans in a Changing Media Environment" is the result of this assesment.

This report quantifies the changes occurring in the North Korean media landscape and describes the dynamics and processes that enable and influence them. Although primarily designed to serve as a current and comprehensive examination of the inflow and effects of foreign media in the North Korean information environment for interested policy-makers, the study also pays special attention to the media freedom initiatives sponsored by the U.S. government.

RESEARCH CONDUCTED BY INTERMEDIA USED IN THIS ASSESSMENT

In order to construct as complete and accurate a picture of the North Korean media landscape as possible, this media assessment relies on a number of research inputs, each designed to shed light on certain areas or dynamics within the information environment. The primary research inputs to the assessment include:

2010 U.S. Broadcasting Board of Governors (BBG) North Korean Refugee and Traveler Survey; n=250; PRC.² An annual survey of North Korean travelers and refugees from which most quantitative statistics in this report are drawn.

2011 Recent Defector Survey; n=420; ROK

A survey of recent North Korean defectors to South Korea (ROK) with differing levels of outside media exposure used primarily to analyze the effects of outside media exposure on North Koreans.

2011 Qualitative Interviews with Recent Defectors; n=100; ROK

Qualitative interviews with recent North Korean defectors designed and recruited around the four themes of the report.

2011 Expert Content Analysis; U.S., ROK, Japan

Three experts with differing backgrounds and nationalities conducted content analysis of independent radio broadcasts.

2011 Expert Interviews; U.S., ROK, Japan, PRC

International experts were interviewed on specific elements of the media environment in North Korea.

CAVEATS

Much of the research conducted for this assessment was based on interviews with North Korean defectors, refugees and travelers. These individuals represent some of the best sources of current information about North Korea. In addition, increasing numbers of refugees and defectors, who are able to leave North Korea relatively quickly and with less planning, provide researchers with a larger, fresher pool of interviewees, who are more likely to be strong proxies for North Koreans in-country. However, refugees and defectors do not necessarily reflect in equal measure, proportion or intensity the thoughts, opinions and behaviors of those still in the country. Furthermore, like all studies of North Korea, quantitative findings presented in this report are not statistically representative of the North Korean population as a whole. Drawing broad national implications from this research should not be done without these caveats firmly in mind.

A note about the format of this report:

This report has been arranged thematically. Rather than presenting the findings from each research input individually, the findings have been synthesized and will be reported together as they shed light on a particular topic or theme.

GENERAL MEDIA ENVIRONMENT IN NORTH KOREA

At first I watched outside media purely out of curiosity. However, as time went by, I began to believe in the contents. It was an addictive experience. Once you start watching, you simply cannot stop.

– 27, Female, Yanggangdo, Left NK January 2010

KEY FINDINGS

- While it remains the most closed media environment in the world, North Korea has, to a significant extent, opened unofficially since the late 1990s. North Koreans today have significantly greater access to outside information than they did 20 years ago.
- A substantial, consistently measurable portion of the population has direct access to outside media.
- Despite access to an increasing variety of media devices, including many that can be used to carry or access outside information, word of mouth (WOM) is the most important source of information for most people inside North Korea.
- Nearly half of the study's sample reported having watched a foreign DVD while in North Korea.
- The motivations for accessing outside media are diverse, ranging from curiosity and boredom, to a desire for practical business information.
- Despite geographic restrictions on its reach, foreign TV viewing is popular along the Chinese and South Korean borders.
- Close to one-third of TV viewers claimed to have watched foreign television content while in North Korea.
- DVDs have quickly grown to become the most commonly accessed form of outside media in North Korea. Social norms around foreign DVD viewing appear to be shifting. There is substantial evidence of North Koreans gathering together to watch illegal DVDs.
- Foreign media consumption appears to be an additive process in which people exposed to one form of outside media are more likely to seek out additional sources.
- Foreign radio broadcasts remain important as a source of real-time, sensitive outside news.
- There appears to be relatively little substitution between media sources as demand for outside media still greatly outpaces supply.
- Generally, those with greater financial means have greater access to outside media.
- Except for in a few international hotels and among some of the top North Korean leadership, there is no satellite TV penetration in North Korea.
- In recent years, advanced media devices such as computers, USB drives and illegal Chinese mobile phones have begun entering North Korea in substantial numbers, especially among the elite.

By international standards, the information environment in North Korea is still extremely restricted. Freedom House and Reporters Without Borders routinely rate the DPRK as the least free media environment in the world.³ Yet, on the ground, things are changing and the near complete information blockade the regime once maintained has begun to erode.⁴ An influx of inexpensive media devices, content, and human traffic from China have increased North Koreans' exposure to outside information. In addition, the proliferation of Chinese mobile phones along the Sino-DPRK border, an increase in the number of organizations sending content into North Korea, less regular and strict enforcement of restrictions against accessing outside information, less fear and greater willingness to share information all have combined to allow North Koreans greater access to outside information than ever before.

During the famine period of the late 1990s, the DPRK's state-controlled system of distributing goods and services to its citizens broke down throughout most of the country, and North Koreans had to return to the market in order to survive.

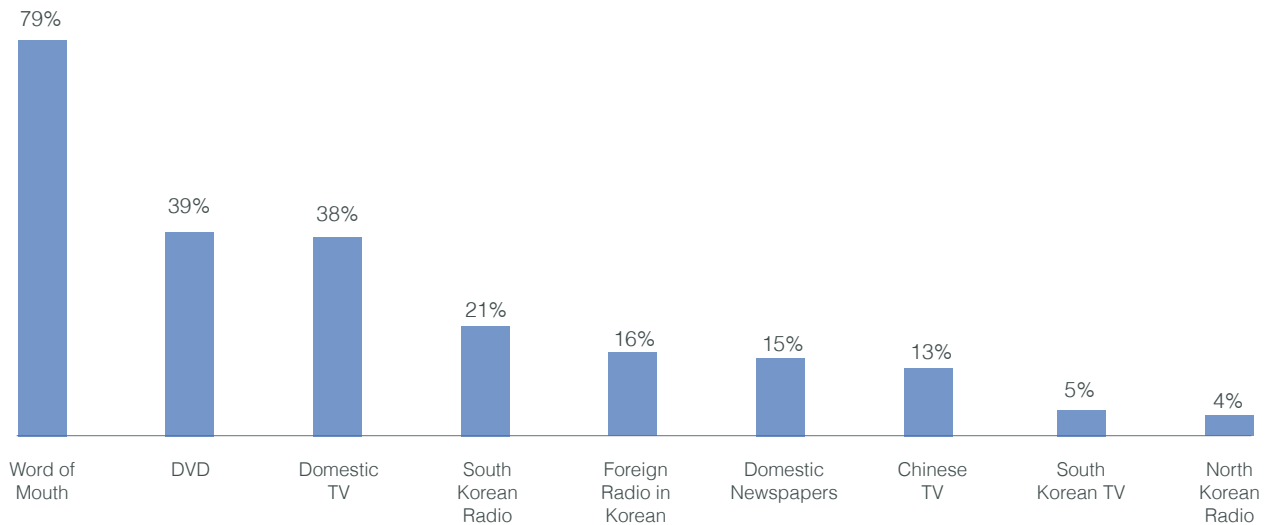
Marketization is the most important [change in North Korea] as it has become the core of life in the DPRK. New networks of transactions have arisen both within the DPRK and with the outside world. The market has brought with it a decrease in control and an increase in mobility and has spurred the creation of human and information networks.

*- Lee Soo-Jung, Professor at the Graduate School of North Korean Studies,
Kyungnam University, Seoul, South Korea*

Marketization combined with the North Korean authorities' inability to enforce laws and regulations are perhaps the most important dynamics driving a steadily opening media environment.

Figure 1, which presents what respondents cited as their most important sources of information in the DPRK, shows North Koreans are now able to rely on a range of information sources outside those officially sanctioned by the regime.

Figure 1
Important Sources of Information
(Percentage of respondents who identified this source)



BBG Survey of North Korean refugees/travelers (2010 n=250) carried out by InterMedia

WORD OF MOUTH

Consistent with expectations in any tightly controlled media environment, word-of-mouth sources – people sharing with those they trust – are the most common sources of information for the majority of North Koreans. North Koreans commonly cite “rumors” as the most important source of non-official information available to them. Word-of-mouth communications can also make information from sensitive sources such as cross-border traders and international radio available to those who do not have direct access to those sources. Information first received via outside media sources and then spread via word of mouth is a phenomenon common to all across all types of outside information.

Based on the results of the 2010 BBG North Korea Refugee and Traveler Survey, 98 percent of North Koreans surveyed claimed to have received information that was not available in the domestic media via word of mouth.

Many interviewees referred to the importance of knowledgeable friends and trusted acquaintances from whom they received otherwise unavailable information. Nearly every survey respondent claimed to know someone who routinely shared information that was not publically or officially available. When respondents were asked about where knowledgeable friends and acquaintances received their information, most believed that they were simply part of a larger word-of-mouth network. Some were able to identify their contacts' primary information sources, which consisted mostly of privileged materials accessible to those in high social positions, access to some form of non-DPRK media, or direct contact with foreigners.

Figure 2: Many North Koreans Obtain Unsanctioned Information from Personal Contacts

Where did the contacts source their own information?

(Percentage of respondents identifying this source was used by their personal contacts)

Word of mouth	84%
DVD	39%
Party / Security Apparatus Member & had Access to Privileged Materials	30%
International Radio	18%
International TV	17%
Traveled to China	3%
Contact with Outsiders	2%
Other	5%

BBG Survey of North Korean refugees/travelers (2010 n=250)
carried out by InterMedia
Base: 246 who know someone with special knowledge

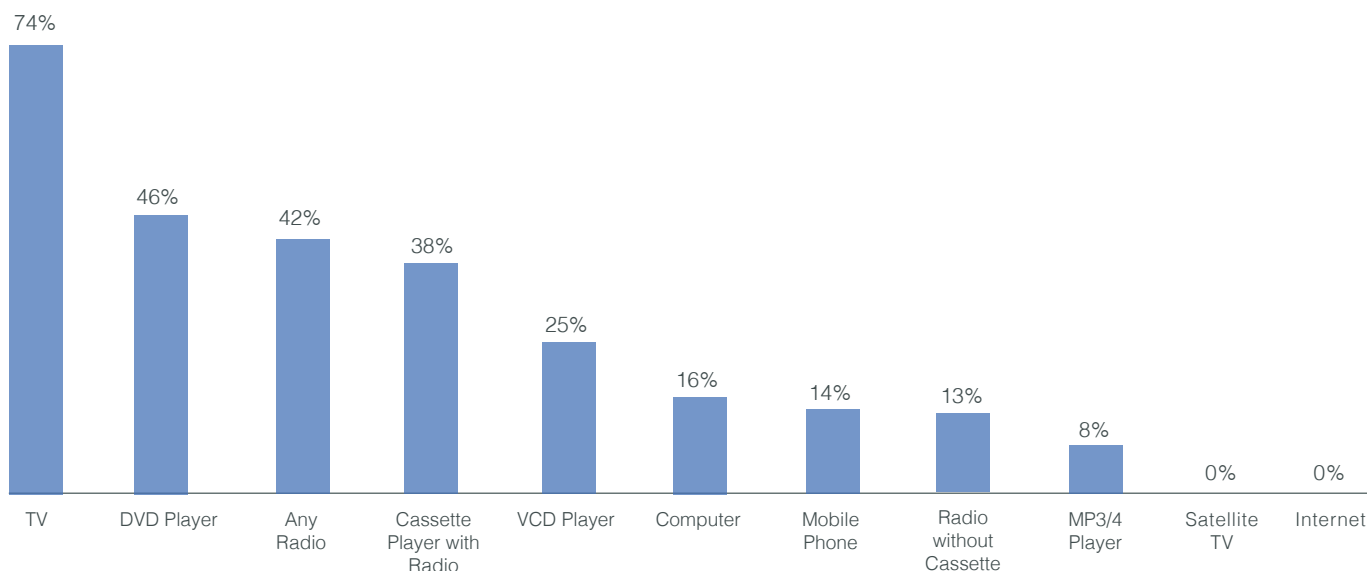
MEDIA DEVICES

As shown in Figure 3, North Koreans today have access to a variety of media devices. Many of these devices are relatively new to North Korea, entering only as inexpensive Chinese models became available. A larger proportion of the North Korean people now also have access to devices that were once only available to the elite.⁵

Figure 3

Access to Media Platforms in North Korea

(Percentage of total sample with access to the following media platforms)



BBG Survey of North Korean refugees/travelers (2010 n=250) carried out by InterMedia

TV was the most readily accessible media device among the 2010 BBG survey respondents. Once considered luxury items available only to the elite, inexpensive Chinese-made and secondhand television sets are within the financial reach of many North Koreans today.

DVD players have grown quickly in popularity with the increasing availability of DVDs inside North Korea. In the 2010 BBG survey and in all subsequent InterMedia quantitative studies, DVDs were found to be the most commonly accessed form of outside media in North Korea.

Forty-two percent of the sample reported access to a radio. Since many North Koreans are unaware of the technical differences between wavebands, the most reliable proxy for whether or not a radio is shortwave capable is whether or not it has a cassette player attached. While it is not a perfect metric and possibly underestimates the percentage of shortwave capable radios, in general, radios without cassette players are more likely to be shortwave capable than radios with cassette players.

The adoption of media devices in North Korea has not occurred evenly across geographic and social divides. Elites and border residents, especially those with relatively substantial financial means, are the first groups in North Korea to acquire new technologies. This large gap in adoption rates as well as other geographic and legal barriers to access makes constructing a coherent timeline of media device adoption in North Korea very difficult. However, in a general and impressionistic way, it is possible to chart the entrance of media devices into the information environment in North Korea. Although many North Koreans had radios under Kim Il-sung, qualitative research indicates that during the famine period of the late 1990s many more North Koreans began to seek out foreign broadcasts via their radios. Televisions have been available to political elites for quite some time. But, after the Arduous March period, the severe famine of the late 1990s, secondhand and inexpensively produced Chinese televisions entered the DPRK in greater numbers and became more widely available, to the point where most North Koreans appear to have access to televisions. The early to mid 2000s saw the beginning of what has become a substantial influx of DVDs and DVD players into North Korea. More recently, and still disproportionately among elites and border residents, newer media devices are being used in increasing numbers by those with the economic means to acquire such items.

Figure 4
When Various Media Devices Became Commonly Available in North Korea



While still substantial purchases for most North Koreans, these commonly accessed media devices are now within the economic reach of many people.⁶

Access to media devices is obviously a necessary condition for accessing information through these platforms. Appendix 1 provides a breakdown of the demographic profiles of respondents who had access to each media device.

FOREIGN MEDIA

Although official media remain an important source of information for many North Koreans, the inflow of outside information into North Korea is of primary concern to this study. Official media function as mouthpieces for the regime and North Koreans' access to it is nothing new. Since the late 1990s, however, foreign media access has been growing substantially in North Korea.

TV, DVDs and radio are the primary means through which some North Koreans are able to access outside information. Keeping in mind the caveats of the Refugee and Traveler Survey, nearly one-half of the study's sample reported having watched a foreign DVD while in North Korea, while around one-quarter of the sample claimed to have listened to foreign radio or watched foreign TV. Although the media environment continues to develop, these figures are in line with many previous and subsequent InterMedia studies of North Korean refugees and defectors. Even considered with the appropriate caveats, these figures are a clear sign that foreign media is making significant inroads into North Korea.

Foreign media-use patterns vary depending on a range of factors including class, economic means, geography, personal risk tolerance and content preferences. People who access outside information via one method are more likely to access outside media in multiple ways. However, the frequency, means and motivation for access vary.

I watched TV almost every day and listened to the tape recorder-radio once or twice a week. I saw one CD per week...I liked following the news, usually on the radio. I used MP3 and MP4 to listen to music and the tape recorder to watch dramas and movies.

– 31, Male, Hyesan City, Left NK January 2010

I listened to South Korean radio broadcasts, but just for fun, not necessarily to gain helpful information. I listened to music on the MP3 and DVD as well. CDs were used for listening to music and playing video games. We had this small video game player and also CD and DVD players.

– 27, Female, Yanggangdo, Left NK January 2010

Foreign media content preferences among qualitative interviewees shed light on the diverse motivations North Koreans have for accessing outside information, from mere curiosity to entertainment, psychological comfort, and more utilitarian motivations such as collecting business information or preparing to defect.

Figure 5: Prices at Kangdong Market in Pyongyang, July 2011⁷

TV (29 inch)	USD 300
DVD Player	USD 13
MP3 Player (2 gig)	USD 8
Laptop Computer	USD 300
DVD	USD 0.5

Figure 6: Foreign Media Reach in North Korea by Media Type
(Percentage of total sample who accessed the following platforms)

Platform	Reach
Foreign DVDs	48%
Foreign Radio	27%
Foreign TV	24%

BBG Survey of North Korean refugees/travelers (2010 n=250) carried out by InterMedia

After making up my mind to run away, I wanted to learn more about the South Korean society. Information I needed to prepare for defection caught my attention the most.
– 40, Male, Hyesan City, Left NK July 2010

I was keenly interested in information that was helpful for my business. I also had to keep a close eye on news on food aid to North Korea since it affects exchange rates.
– 27, Female, Yanggangdo, Left NK January 2010

I would listen to music on the radio...I enjoyed listening to that and watching South Korean TV dramas.
– 25, Female, Hamkyongbukdo, Left NK January 2010

Social norms related to outside media access appear to be changing. Even in the relatively recent past, many defectors who had accessed foreign media in North Korea reported feeling as though there were very few other North Koreans who did so. In interviews conducted for this project however, interviewees generally expressed the belief that accessing outside media is quite common in North Korea, though many believed the behavior may be disproportionately distributed among various classes and acknowledged that it is done in secret. Foreign media is still too dangerous a topic to be discussed in public and is discussed explicitly with trusted friends and family, if at all. However, several interviewees referred to signals that underlie their belief that others were tuning in.

I think now, almost all citizens listen or watch. You can tell when you talk to them...they will use [South] Korean words. In North Korea there is no such phrase as “no doubt” (당연하지). When they use a word like that, you think, “that person watches too.”
– 45, Female, Hamkyongnamdo, Left NK May 2010

The remainder of this section of the report will focus on TV, DVD and radio individually in order to assess the audience for each device and the ability of each device to deliver outside information within the context of the North Korean media landscape. Discussion of newer media devices such as USBs, mobile phones and MP3 players will be reserved for the New Information Technologies section of this report.

TELEVISION

Television is the most accessed media platform in North Korea. Seventy-three percent of survey respondents watched TV in North Korea and 51 percent personally owned a television. While a majority of television viewers reported watching only domestic content, about one-third of television viewers (24 percent of the total sample) claimed to have watched foreign television content while in North Korea. The percentage of foreign TV viewers in the 2010 survey is actually down somewhat from previous years, primarily because recruitment for the 2010 study focused on identifying respondents from inland provinces where foreign TV signals are not accessible.

Figure 7: Was the TV you usually watched fixed channel or tunable?

(Percentage of television viewers)

Fixed number of channels	72%
Tunable across the dial	3%
Had both	25%

BBG Survey of North Korean refugees/travelers (2010 n=250)
carried out by InterMedia
Base: 183 television viewers

Despite official regulations that stipulate televisions must be fixed to official channels only, increasingly North Koreans appear to have access to television sets capable of capturing outside broadcasts. Of those who usually watched

fixed-dial televisions, 31 percent reported having modified their televisions in order to capture stations aside from those pre-selected. About half of those who modified their television sets claimed they purchased the equipment to do so in the market.

Television electricians earn a lot of money because they modify people's TVs [to get foreign stations].

*–26, Female, Pyongyang, Left NK
January 2010*

I bought a Chinese TV from a private electronics store – individuals place electronics in their own homes and bring customers there to sell them to.

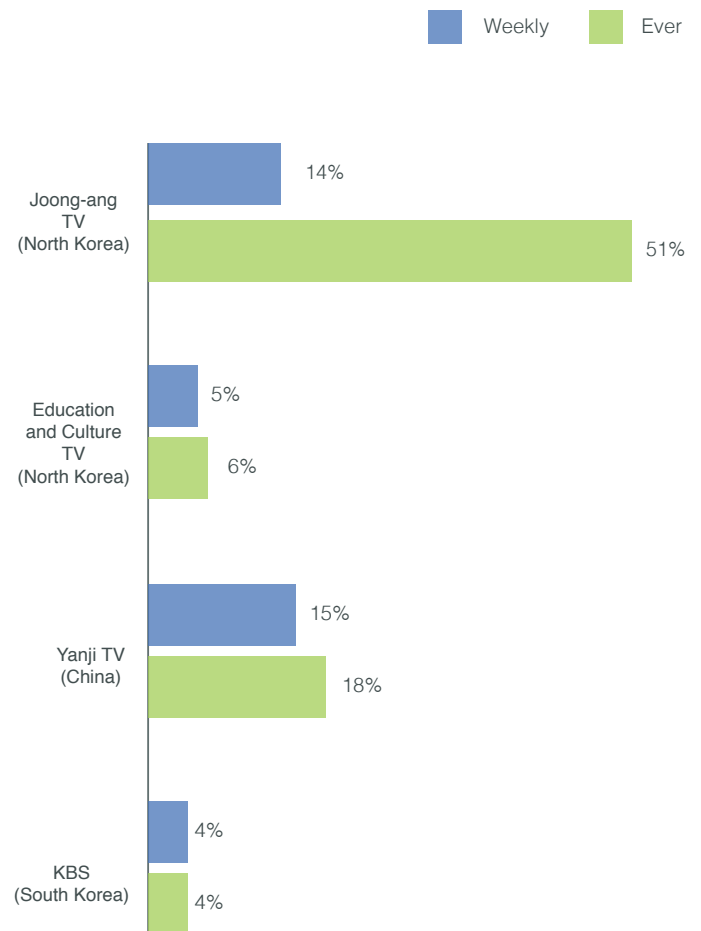
*– 39, Female, Hyesan City, Left NK
June 2010*

Except for in a few international hotels and among some of the top North Korean leadership, there is no satellite television penetration in North Korea. This means that North Koreans who are able to view foreign TV do so via terrestrial broadcasts either from China or South Korea. Foreign television viewing is therefore geographically limited to the areas within television signal range (usually 50 to 75 miles) of the Chinese or South Korean border. Both survey data and qualitative research suggest that among people in areas within reach of foreign broadcasts, outside television viewing is relatively more common than the overall survey findings suggest.

Chinese broadcasts such as Yanji TV were the most commonly viewed foreign broadcasts among the respondents. This is a partial product of the geographic distribution of the sample, as a high proportion of survey respondents hail from the Chinese border region. Some respondents from the southern part of North Korea also reported watching KBS and other South Korean broadcasts directly.

Twenty-three percent of respondents watched South Korean television programming in some

Figure 8
TV Viewing in North Korea by Station
(Percentage of total sample)



BBG Survey of North Korean refugees/travelers (2010 n=250)
carried out by InterMedia

Figure 9: How did you watch South Korean TV broadcasts?
(Percentage of viewers of South Korean TV)

Carried on Chinese television	78%
On DVD	73%
Directly from South Korea	21%

BBG Survey of North Korean refugees/travelers (2010 n=250)
carried out by InterMedia
Base: 58 South Korean broadcast viewers

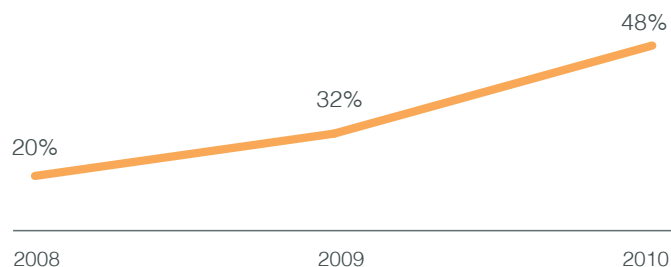
form, either directly, via Chinese TV, or on DVD. People who view South Korean television directly are able to access a wide range of programs including South Korean news. However, South Korean television rebroadcast on Chinese television or burned onto DVDs consists almost entirely of dramas and other entertainment programs.

There is significant evidence that people in the southern regions of North Korea are able to get around compatibility problems between PAL-D and NTSC broadcasts in order to view South Korean broadcasts directly, by purchasing conversion equipment, obtaining NTSC or multisystem televisions, or simply by watching the programs in degraded quality. Anecdotal reports suggest that relatively inexpensive Chinese-produced multisystem televisions may be available in southern North Korea, though it is not clear whether that is the result of consumer demand or simply a fortunate production coincidence.

DVDs

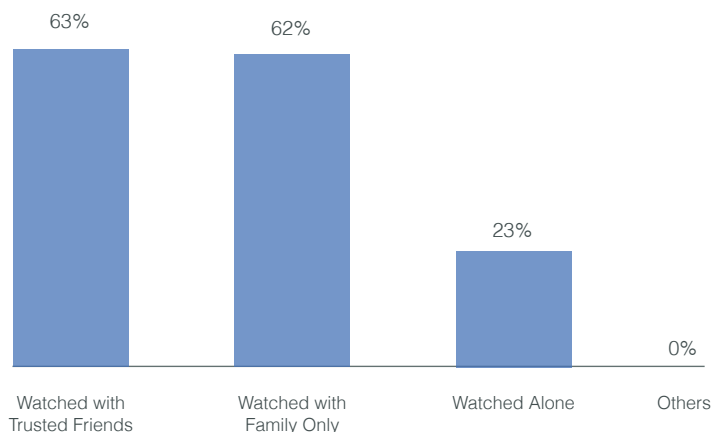
DVDs are the most common means through which North Koreans access outside media. Nearly half of the 2010 survey respondents reported having watched foreign DVDs while in North Korea. Subsequent InterMedia studies suggest that DVD viewership continues to grow. Figure 10 presents the reach of foreign DVDs from 2008 through 2010.

Figure 10
Foreign DVD Viewers
(Percentage of total sample)



BBG Survey of North Korean refugees/travelers (2010 n=250)
carried out by InterMedia

Figure 11
With whom did you watch foreign DVDs?
(Percentage of DVD viewers)



BBG Survey of North Korean refugees/travelers (2010 n=250)
carried out by InterMedia
Base: 120 DVD Viewers

DVDs ARE THE MOST POPULAR FORM OF OUTSIDE MEDIA

Qualitative interviews with recent North Korean defectors indicate that foreign DVD viewing has come to be viewed by many North Koreans as normal behavior rather than exceptional or abhorrent. While foreign radio listening may remain largely the purview of more experienced outside news consumers or of North Koreans with higher risk tolerance and a greater desire for outside information, foreign DVDs are viewed by much broader audiences in North Korea, many of whom do not conform to the previous profile of typical outside media users.

Social norms around foreign DVD viewing appear to have evolved to the point where many North Koreans no longer feel the need to conceal the behavior from those they trust. Most of the respondents who reported watching foreign DVDs in North Korea said that they watched the DVDs with others – either friends or family members.

I usually watch them with my family and neighbors who think alike. At most I've watched [foreign DVDs] with about six people, which is just one more person plus my family.

–53, Female, Pyongyang, Left NK January 2010

While South Korean and many other foreign DVDs are illegal and serious punishment can be levied on those caught viewing them, DVD players are not illegal and there are DVDs that can be legally viewed in North Korea. Foreign radio and TV broadcasts require listeners and viewers to have access to illegal freely tuning radios or illegally modified fixed-dial sets. Since DVD players are not illegal, it is not dangerous to have the player but simply the content, which is relatively easier to hide. Therefore, bans on foreign films are nearly impossible to enforce.

DVDs most often contain soap operas, movies or other forms of entertainment and are viewed as such by the authorities. Qualitative research suggests that it is often easier to avoid punishment or that punishments are less severe for those caught watching foreign DVDs than for other media types.

However, accessing any foreign media in North Korea, DVDs included, is a dangerous action for which precautions must be taken.

To be honest, watching an episode of a Korean drama is a psychological war. First, I need to completely guard the place where I'm watching the show; I have to block the windows with curtains and closely guard the entrance door. Then I lock the door and listen with an earphone on a low volume so that no one outside can hear what I'm watching. Because there are frequent inspections, I make sure I can move the moment the inspectors come. The whole scene of me watching drama is worthy of a real drama show. Nonetheless, there is the additional excitement that comes from watching in secret

– 25, Male, Pyongyang, Left NK June 2010

DVDs ARE COMMON GATEWAYS TO FURTHER OUTSIDE MEDIA CONSUMPTION

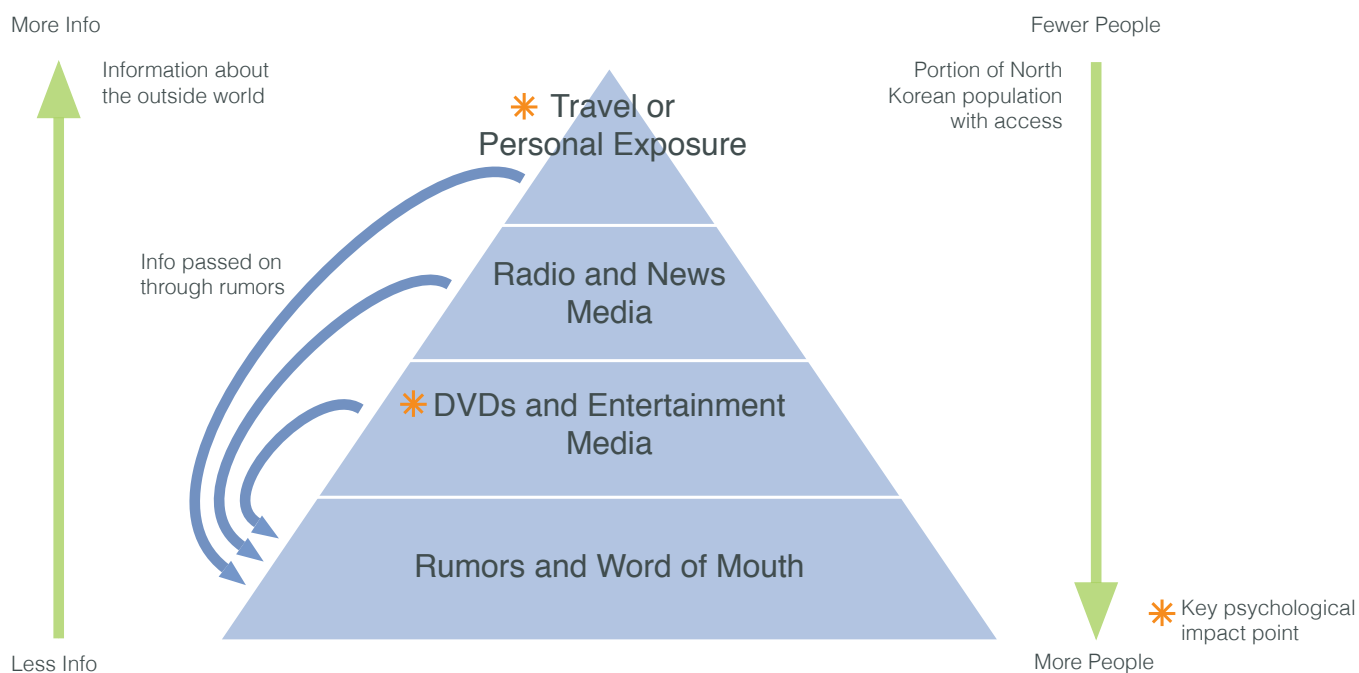
By continuing to expand, it appears that DVD viewership may now constitute an important psychological impact point for many North Koreans. DVDs give many North Koreans their first and most credible glance of the outside world, particularly South Korea.

Interviews and survey analysis indicate that North Koreans' specific knowledge and particular beliefs about the outside world are most affected by the relatively greater quantity of information broadcast through outside radio or TV news. However, South Korean and other foreign films and dramas have much higher production values than North Korean media and provide viewers in the North with exposure to a powerful and easily comprehensible reality beyond that of North Korea. When looked at in terms of broad reach, in a relatively short period of time, DVDs have grown to become the most common and perhaps most impactful form of outside media in North Korea. As information about South Korea has spread, the North Korean government backed away from its stance that South Korea was economically worse off than North Korea, as it was unable to sustain that claim in the presence of clear evidence of South Korean economic prosperity.

Outside media consumption seems to be an additive process. North Koreans who are most intrigued by the outside world or most disenchanted with their own circumstances often supplement their entertainment DVD viewing with outside news media in the form of radio or TV.

As Figure 12 illustrates, the media environment can be thought of as a pyramid. Those at the top have access to the greatest quantity and most detailed outside information, while those at the bottom are limited to rumors and information passed via word of mouth. Survey findings suggest that an increasing number of North Koreans are willing and able to move up the information pyramid.

Figure 12
Outside Information Hierarchy in North Korea



CREDIBLE BECAUSE THEY ARE NOT PROPAGANDA

Some South Korean and international groups are making attempts to send documentaries and other forms of news content into North Korea via DVD. However, only one respondent in our 2010 survey had seen a documentary in North Korea. The vast majority of the DVDs circulating in North Korea contain entertainment content such as movies or soap operas. South Korean dramas and films were by far the most commonly viewed foreign DVDs, followed by Chinese then Western films and dramas.

In qualitative interviews, refugees and defectors have claimed that one of the most appealing elements of South Korean films and dramas circulating in the North is that they are clearly not produced with North Koreans in mind as the target audience. North Koreans are well-practiced consumers of heavy-handed propaganda and the absence of such propaganda in South Korean dramas increases their credibility in the minds of many North Korean viewers. The sophistication of North Korean viewers when it came to identifying propaganda was clear in many interviewees' comments.

[When I started watching South Korean movies and dramas] I noticed that there were a lot of movies that focused on the daily lives of South Koreans and that there were no themes that condemned North Korea.

– 39, Female, Yanggangdo, Left NK June 2010

I think the South Korean dramas are realistic. North Korea only shows beautiful images. But in the South Korean dramas, there is fighting and I think that is realistic. There is also poverty, but in North Korea they only show you good things, so it does not seem real.

– 26, Female, Pyongyang, Left NK January 2010

While the content of South Korean dramas may be less overtly political, other messages are picked up by North Korean viewers. Comparisons between the lives of the characters in the dramas and their own reality in North Korea are natural and often produce stark contrasts.

I like dramas that depict everyday life [in South Korea]. Not because I'm curious but because you can see how much South Korea has developed. It is easy to compare the living standards of North and South Korea when watching these dramas. There are a lot of things that I see in the dramas that we were not exposed to or had no access to while growing up.

– 39, Male, Hyesan City, Left NK April 2010

ACQUIRING FOREIGN DVD_s IN NORTH KOREA

Foreign DVDs can be acquired a number of ways. They are traded at least as often as they are purchased, and because DVDs have permanent and limited content, they are often shared between friends and family members.

DVD dealers are often those with some degree of protection from punishment, such as well connected elites or wealthy traders. For these individuals the profit from sales is worth the risk.

We placed orders to Chinese merchants and also bought them by ourselves at downtown stores...We purchased those movies at a store in Hyesan that specializes in making pirate versions. The owner of the store called me whenever a new movie was released. Then I would go pick it up and sell it to my customers. Only those confident about escaping crackdowns have the guts to do business like that. Ordinary people don't dare to do so. State officials or rich people usually do those things.

– 27, Female, Yanggangdo, Left NK January 2010

Figure 13: How did you obtain foreign DVDs?

(Percentage of foreign DVD viewers)

Borrowed from friends and family for free	60%
Purchased from someone I trust for a fee	57%
Purchased in the market	10%

BBG Survey of North Korean refugees/travelers (2010 n=250) carried out by InterMedia
Base: 120 foreign DVD viewers

Many of the qualitative interview respondents mentioned the important role that ethnic Chinese living in North Korea and ethnic Koreans living in China play in circulating prohibited goods, particularly DVDs.

In North Korea, most of the DVDs circulate through the Korean Chinese people. In reality, it is very difficult for North Koreans to get DVDs that contain South Korean content. People near the border may find them easily but there are virtually none inland. It was also the overseas Chinese who brought the "Korean Wave" to North Korea. Even now, people send money into

North Korea through the overseas Chinese people. The North Korean government told the overseas Chinese they do not care what they do – whether they watch a Chinese movie, a South Korean movie, or an American movie – in their household. But the government did add that when the DVD leaves the house, it is subject to North Korean law. However, people who are close to the overseas Chinese sneak the DVDs out. Then they are copied and circulated throughout the market. Not even 100 men can stop a person who decides to steal. No matter how many people die, the sensational popularity doesn't die. That is the power of culture.

– 25, Male, Pyongyang, Left NK June 2010

RADIO

Foreign radio occupies a unique space in the North Korean media environment. Due to the often more political and directly critical nature of broadcasts, listening to foreign radio is more sensitive and dangerous an activity than viewing outside TV or DVDs. From a production standpoint, scratchy shortwave and AM radio broadcasts are also far less compelling than professionally produced South Korean dramas on DVD.

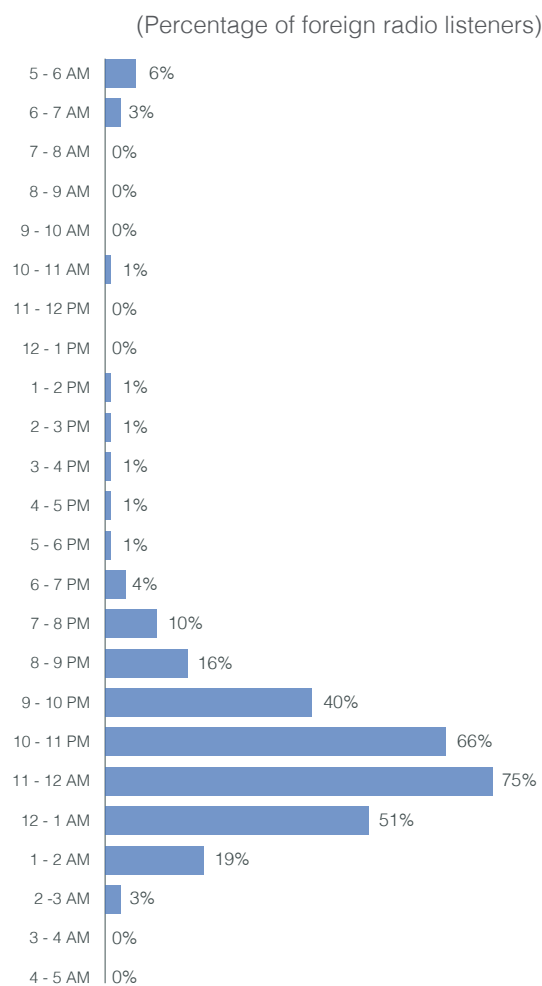
However, foreign radio is the only nationwide source of real-time outside media in North Korea and the only source of outside news to those who are unable to receive TV broadcasts from South Korea or China. Foreign radio is also the only form of outside media produced specifically with North Korean audiences in mind, in some cases by North Korean defectors.

There is a consistently measureable foreign radio listening audience in North Korea. The 2010 BBG Refugee and Traveler Survey found that 27 percent of respondents had listened to foreign radio in North Korea. This finding has been relatively consistent across the years. InterMedia surveys consistently identify foreign radio listeners from throughout North Korea. They have a more distinct demographic profile than audiences of other types of foreign media: they tend to be more male and somewhat older than audiences of other forms of media. Appendix 1 provides a complete demographic breakdown.

Qualitative interviews revealed many instances in which interviewees or people they knew were able to pay a bribe to avoid punishment for listening to foreign radio. Yet despite these instances, listening to foreign radio remains a dangerous activity. Most foreign radio listening is done in the relative security and seclusion of night.

In order to listen to outside radio broadcasts North Koreans must modify their fixed dial radio or purchase an illegal free-tuning radio.

Figure 14
Listening Times Among Foreign
Radio Listeners



BBG Survey of North Korean refugees/travelers (2010 n=250)
carried out by InterMedia
Base: 68 foreign radio listeners

As inexpensive, easily concealable, and mobile free-tuning radios have made their way into North Korea in greater numbers from China, an increasing number of foreign radio listeners appear to be using free-tuning radios to listen to outside broadcasts. However, many radio listeners still modify fixed-dial radios in order to receive unsanctioned channels.

Many free-tuning radios also are shortwave capable, unlike the majority of fixed-dial radios. If more radio listeners turn to free-tuning radios the proportion of listeners using shortwave capable radios will continue to increase.

IS REAL-TIME NEWS CONTENT DIRECTLY USEFUL TO NORTH KOREANS?

One of the advantages of radio over other forms of outside media for North Koreans is that it is the only credible source of real-time news that can be broadcast to the whole of North Korea. This naturally begs the question of the degree to which news content is important to people in North Korea, a question that will be taken up again in the Impact of Media Exposure section.

While many North Koreans probably access outside media out of curiosity, for entertainment purposes, or for psychological comfort, there are some types of information that are extremely useful to North Koreans, particularly those heavily engaged in market activities.

People were interested in international politics including U.S.-North Korea relations and inter-Korean relationships, since they influence contraband trading. When U.S.-North Korea relations deteriorate or when the South Korean army begins military drills, security checks at the border become very rigid. We have to prepare for those situations. During tense periods there are certain categories that we avoid purchasing. We also have to keep a close eye on the fluctuations in exchange rates. When the border shuts down, exchange rates soar and mineral prices go down. In contrast, imported products become more expensive. It works like a market economy. Many people in the North are aware of the system but there is still a large majority who don't know.

– 31, Male, Hyesan City, Left NK January 2010

An understanding of the implications of international politics on trading is most likely limited to certain classes in North Korea. However, for these classes, such information is important to their livelihoods. Other InterMedia studies have suggested that the economic implications of news items are spread more quickly than other types of stories beyond direct listeners to others via word of mouth.

Figure 15: What kind of radio did you have in North Korea?

(Percentage of radio listeners)

Fixed channels	22%
Tunable across the dial	28%
Owned both	49%

BBG Survey of North Korean refugees/travelers
(2010 n=250) carried out by InterMedia
Base: 86 radio listeners

Figure 16 : Where did you get your tunable radio?

(Percentage of tunable radio users)

Market	45%
Chinese merchants	43%
Relatives in China or South Korea	8%

BBG Survey of North Korean refugees/travelers
(2010 n=250) carried out by InterMedia
Base: 66 tunable radio users

SUBSTITUTION EFFECTS

The survey data indicate that a rapid increase in DVD viewing has not reduced the number of foreign radio listeners. It is possible that greater access to entertainment media such as DVDs may mean that some people no longer wish to take the risk of listening to foreign radio. These might be people who listened to foreign radio primarily out of curiosity or the desire for entertainment – in other words, those for whom the risks outweigh the advantages. However, in general, North Koreans' demand for foreign media is far greater than the supply. It is difficult to obtain a new DVD every day, but fresh content is available on the radio.

Of course I prefer DVDs to the radio, although I didn't stop listening to radio programs. The number of people who wish to listen doesn't decline; it only grows. As time goes by, people want to own more DVDs and gain access to more radio programs.

– 27, Female, Yanggangdo, Left NK January 2010

More basic limitations also result from infrequent power supplies.

I listen to the radio when I'm bored and there isn't any electricity; I use batteries and listen as much as I want. When there is electricity I watch DVDs.

– 40, Female, Pyongyang, Left NK January 2010

Perhaps even more importantly, access to one type of media often seems to lead to the desire to access others. As noted above, rather than a strong substitution effect, entertainment media access may be functioning as a gateway to other media.

FINANCIAL MEANS AND ACCESS TO INFORMATION

All the respondents in the general media environment subgroup of the qualitative interviews acknowledged the existence of large economic gaps between different strata of North Korean society. Many of the interviewees believed that those with greater economic means had significantly more access to outside information than those with fewer economic means. Interviewees mentioned several reasons for this connection, including:

- Freedom from worrying about basic needs, such as food and clothing, allows those with economic means more time and energy to devote to obtaining outside information.
- Many media devices are available through the market and those with greater economic means are simply able to purchase more media devices and content.
- Greater economic means translates into the ability to pay bribes, affording the wealthy greater protection from punishment were they discovered accessing foreign media.
- For those with greater economic means (and often also good political standing) international travel is sometimes possible, allowing them one of the most powerful forms of exposure to outside information.
- While the causality is not always clear, those with greater economic means tend to reside in cities or near the Chinese border where it is often easier to obtain outside information.

In a quantitative study conducted primarily with North Korean defectors who were receiving remittances in North Korea and therefore had relatively greater financial means, access to outside information was found to be substantially higher than in studies in which respondents were generally not receiving remittances.⁸

A NOTE ON PUNISHMENTS

Appendix 2 reviews in detail the North Korean legal framework through which the authorities attempt to prohibit the spread and consumption of foreign media within North Korea. It is worth noting that since the mid-2000s, legal restrictions against outside media consumption have actually become more stringent. However, this may be a reaction to the reality on the ground in which punishments for outside media consumption are enforced less often and less strictly than before. Under normal circumstances, security personnel now often choose to take a bribe to overlook illegal media behaviors or the possession of illegal media goods.

Severe and often arbitrary punishments are still handed down for accessing outside media. The regime sometimes enacts particularly harsh punishments on scapegoats when it decides to crack down on illegal media consumption. On the whole, however, punishments have become less severe and less regular.

Another important dynamic that has allowed for a greater degree of opening in the media environment is a significant drop in the amount of people reporting on each other. While North Koreans who access outside media must still be wary of inspection teams dispatched to search for evidence of such behaviors, fewer citizens appear to be reporting on each other. Many North Koreans had to conceal their illegal behaviors from even their own families, as stories of children reporting on parents and spouses reporting on each other for illegal behaviors were common. Recently, however, it appears that the reach of the state no longer extends as much into the closest social bonds. The sharing of sensitive information and evidence of North Koreans gathering together to engage in illegal activities is further evidence of this phenomenon.

All quantitative figures in this overview of the media environment are taken from the 2010 BBG North Korea Refugee and Traveler Survey.^{9,10} Additional findings and quotations are taken from qualitative interviews with recent North Korean defectors in Seoul conducted on behalf of DRL. All findings reflect the interviewees' behaviors and attitudes when they were in North Korea.

IMPACT OF MEDIA EXPOSURE

*[Accessing foreign media] didn't change my life, but it changed how I analyzed my life.
– 39, Male, Hyesan City, Left NK April 2010.*

KEY FINDINGS

- There is a direct and significant relationship between exposure to outside media and positive beliefs and attitudes about South Korea and the U.S.
- Conversely, there is not a significant direct relationship between exposure to outside media and beliefs and attitudes about the North Korean regime. Exposure to outside media does not appear to be a primary direct determinant of North Koreans' beliefs and attitudes about their own regime.
- Both outside entertainment media and outside news media demonstrate significant relationships to beliefs and attitudes about South Korea and the U.S.
- The impact of entertainment media on beliefs and attitudes about the outside world is reduced when the effect of news media is controlled for statistically.
- Discussion of sensitive topics and knowledge of sensitive topics have an amplifying effect on the relationship between outside media exposure and beliefs and attitudes about the outside world.
- Discussion of sensitive topics has a significant relationship to negative perceptions of the North Korean regime.
- North Korean people distinguish between South Korean people and the South Korean government and its policies, but group together Americans and the U.S. government and its policies.



Photo by Walter Callens

SO WHAT? A MODEL OF THE EFFECTS OF OUTSIDE MEDIA EXPOSURE

This section looks more broadly at the potential effects of outside media exposure to attempt to answer the question, “So What?” If, as the research suggests, an increasing number of North Koreans have exposure to some form of outside media what, if any, are the systematic effects of such exposure?

This question is addressed by exploring and attempting to quantify the impact of outside media access on the beliefs and perceptions of North Koreans. Before explaining the findings and their implication, however, it is important to understand the modeling method used to conduct the analysis.

METHOD

Structural equation modeling (SEM) was chosen for this analysis because it allows complex relational hypotheses to be modeled and empirically tested. Although this technique is methodologically ambitious given the challenges of collecting data on North Korea, SEM analysis allows the impact of outside media exposure to be explored more robustly than ever before. The data used in this analysis was collected through a face-to-face survey of recent defectors in South Korea (n=420) commissioned for this assessment.¹¹

It should be reiterated that these results are based on survey data collected from recent North Korean defectors in South Korea, and therefore are not necessarily representative of those still in North Korea. Despite these caveats, great efforts were made when recruiting participants to ensure as diverse a survey sample as possible from within this population.

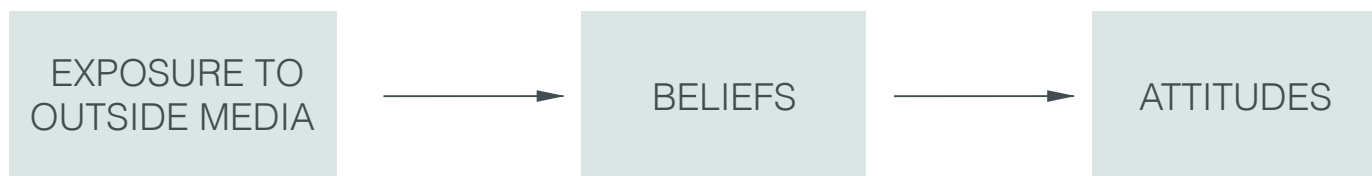
SEM analysis allows us to look at direct and indirect pathways, and quantify the strength of these relationships. However, because of the limitations of data collection among North Koreans, the relationships explored in this analysis cannot be asserted to be causal.

The external validity or the applicability of these findings to all North Koreans, like all research on North Korea, is unknown and burdened with the caveats mentioned above. However, the internal validity of the SEM analysis, the fit of the models and the strength of the relationships explored within the survey sample are generally strong and can be reported confidently.

RELATING OUTSIDE MEDIA EXPOSURE TO BELIEFS AND ATTITUDES

SEM analysis is often used to assess the effects of media exposure on behavioral change. However, due to the extremely repressive nature of the regime, it was not feasible to assess the relationship between outside media exposure and behaviors in North Korea. North Koreans' range of behavior is simply too restricted to be meaningfully measured for this type of analysis. Therefore, beliefs and attitudes of North Koreans were chosen as metrics through which the impact of foreign media exposure might be assessed. While North Koreans might not be able to safely modify their behavior to reflect changing beliefs about the outside world or their own regime, a significant relationship between outside media exposure and beliefs and attitudes would indicate that outside media has a meaningful impact on those who received it.

As the General Media Environment section revealed, North Koreans live in the most restricted media environment in the world. Denying its citizens access to free media has long been one of the North Korean regime's most proven methods of control. Those who seek to provide North Koreans with access to outside information generally do so on the assumption that exposure to outside media will change the beliefs and attitudes of North Koreans and eventually have an effect on the nature of the country. This section seeks to examine this underlying assumption. Our starting hypothesis is that exposure to outside media positively influences beliefs, which in turn positively influences North Koreans' normative attitudes.



THE SAMPLE

The survey sampled recent North Korean defectors who had had different levels of outside media exposure when they lived in North Korea. Participants were asked about their beliefs and attitudes regarding a range of subjects when they were in North Korea. Given the analysis was based on behaviors, beliefs and attitudes of the interviewees while in North Korea, identifying the most recent defectors was key. Respondents were also put through a series of exercises designed to ensure their answers were related to their life prior to defecting and relevant to the question asked.

DIFFERENT FORMS OF MEDIA

From a content perspective there are two basic types of outside media currently entering North Korea. The first is entertainment media, primarily in the form of movies or dramas on DVD. The second is news media, which is receivable by those along the Chinese and South Korean borders via TV, and nationwide via radio broadcasts.

Due to differing policy implications, it is important to understand the degree to which news media and entertainment media may impact North Koreans' perceptions. Currently, market mechanisms naturally supply most outside entertainment media via traders moving back and forth between China and capitalizing on North Korean demand for

foreign dramas and films. Outside news media, however, must generally be supplied to North Koreans through the purposeful efforts of governments or NGOs. Therefore, in the analysis that follows, news media and entertainment media are examined separately.

DIFFERENT BELIEFS AND ATTITUDES

Throughout this analysis, beliefs refer to objective beliefs respondents could agree or disagree with, while attitudes refer to the normative attitudes respondents held toward the constructs. The construct breakdown in Figure 17 gives examples of the beliefs and attitudes surveyed. Broadly speaking, the two most important sets of beliefs and attitudes among North Koreans that could potentially be influenced by exposure to outside media are those about the outside world and those about their own nation's regime.

The North Korean authorities have traditionally gone to great lengths to portray the outside world as an impoverished and dangerous place focused on the destruction of North Korea and its citizens. This version of the outside world is essential to the propaganda narratives with which the state seeks to legitimize its rule. The erosion of such perceptions among North Koreans could call into question this self-proclaimed legitimacy.

Given their clear strategic importance and their prominence in North Korean propaganda narratives, the U.S. and South Korea were chosen to test North Koreans' beliefs and attitudes about the outside world. Due to the very unique relationship between North and South Korea, North Koreans' beliefs and attitudes toward South Korea and the U.S. were examined separately.

THE ROLE OF INTERPERSONAL DISCUSSION AND KNOWLEDGE

The broader literature on the relationship of media exposure and perceptions indicates that there are often other intermediate factors that can amplify the effects of media on those who are exposed to it. Two common intermediate influences on beliefs and attitudes are interpersonal discussion and perceived knowledge of a topic.

This is certainly true in North Korea where the most important source of news for most people is person-to-person word of mouth and knowledge about sensitive topics that can be both practically useful and a form of social currency with trusted others.

...When we're talking among friends, you need to have [foreign information] to hold a conversation. It's an unspoken understanding that you need to know what is going on abroad to be considered sensitive to trends. If one person starts talking about them, everyone chimes in.

– 43, Female, Pyongyang, Left NK February 2010

Perceived knowledge about sensitive topics and discussion of sensitive topics were also tested to assess their relationship with North Koreans' outside media exposure and their beliefs and attitudes.

DEFINING THE CONSTRUCTS

In order to measure outside media exposure, discussion, knowledge, beliefs and attitudes among North Korean defectors, the concepts were transformed into a series of questions that could be asked in a survey. Reliability tests and factor analyses were then conducted to ensure that the questions included in each construct were all measuring the same underlying concept.

Figure 17 presents the questions that make up each of the constructs presented in the SEM model.¹² While additional questions related to each concept were asked, analysis indicated that those presented here provided the best and most consistent measures for each construct to be included in the SEM analysis.

Figure 17: Breakdown of SEM Constructs by Individual Variables

Construct: Items Included in Construct:

Outside News Media Exposure	How often did you listen to news reports on foreign/international radio?	How often did you watch news reports on foreign/international TV?	How important a factor in your decision to defect was information you gathered via international radio or TV?		
Outside Entertainment Media Exposure	How often did you watch South Korean/foreign dramas on DVD or a computer?	How often did you seek out South Korean/foreign entertainment content?	How often did you watch South Korean/foreign dramas or movies with others?	How important a factor in your decision to defect was information you gathered via foreign dramas or movies?	
Knowledge of Sensitive Topics	When an important event happened those around me often looked to me as a source of information?	Compared to those close to you, how informed did you feel about events inside North Korea?	Compared to those close to you, how informed did you feel you were about events in South Korea?	Compared to those close to you, how informed did you feel about events in the U.S.?	
Discussion of Sensitive Topics	How often did you discuss sensitive topics with others you trusted closely?	With how many people did you share sensitive information?	How often did you share information you received from international media?	How many people in North Korea did you feel you could trust with an important secret?	

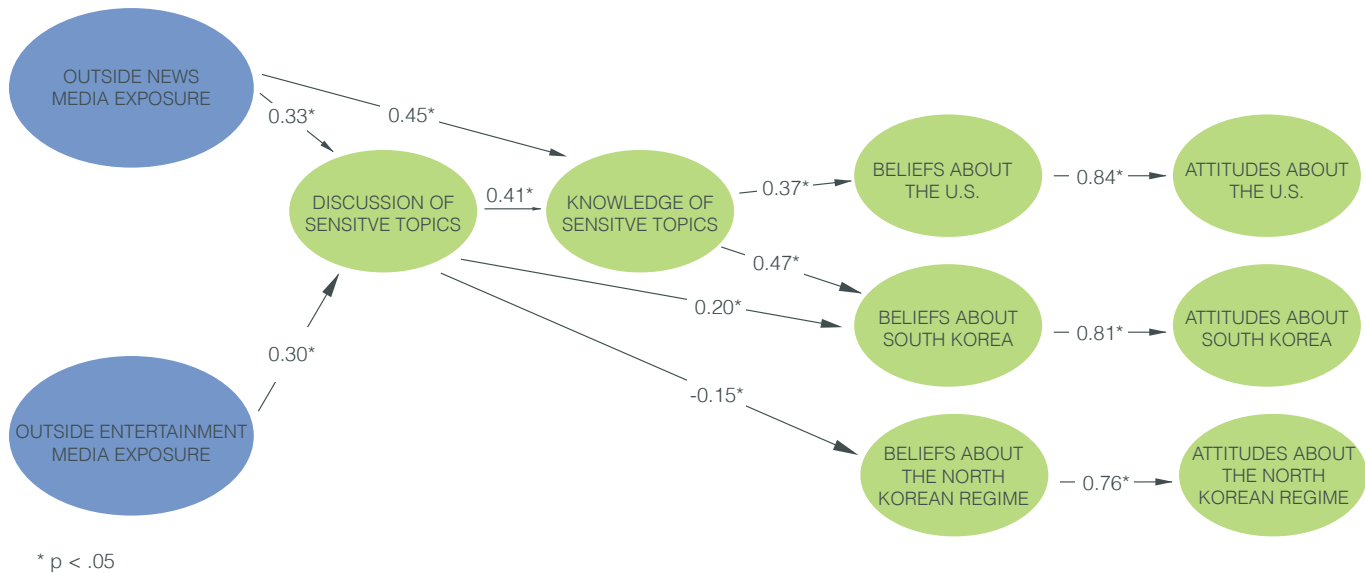
Construct: Items Included in Construct:

Beliefs about South Korea <i>(How much do you agree with the following statement?)</i>	The South Korean government has the best interests of the North Koreans in mind when it makes policies related to North Korea.	The South Korean government wants peaceful reunification.	Ordinary people of South Korea are concerned for people in the North.		
Attitudes about South Korea <i>(How favorably or unfavorably do you feel about...)</i>	South Korea as portrayed in dramas/movies	The South Korean government	Ordinary South Korean people	South Korean culture	
Beliefs about the U.S. <i>(How much do you agree with the following statement?)</i>	The U.S. hopes to see peaceful reunification of the Korean peninsula.	The U.S. promotes peace in NE Asia.	Ordinary people in the U.S. are concerned about the fate of people in North Korea.		
Attitudes about the U.S. <i>(How favorably or unfavorably do you feel about...)</i>	U.S. policies and actions toward North Korea	The U.S. government	The ordinary people of the U.S.	The presence of U.S. soldiers in South Korea	
Beliefs about the North Korean regime <i>(How much do you agree with the following statement?)</i>	Kim Jong-il has the best interests of the North Korean people in mind when he makes policies.	Kim Il-sung had the best interests of the North Korean people in mind when he made policies.	The North Korean government makes sensible policies.		
Attitudes about the North Korean regime <i>(How favorably or unfavorably do you feel about...)</i>	The North Korean government	The North Korean media	The leadership of the North Korean regime	The North Korean Workers' Party	North Korean policies toward its own citizens

THE MODEL

The final model of the relationship between outside media exposure and beliefs and attitudes is presented in Figure 18. Many models were hypothesized and tested in order to better understand the degree to which outside media exposure relates to attitudes and beliefs. Full hybrid models for these distinct models are presented in Appendix 5. The remainder of this section will report the findings from the SEM analysis.

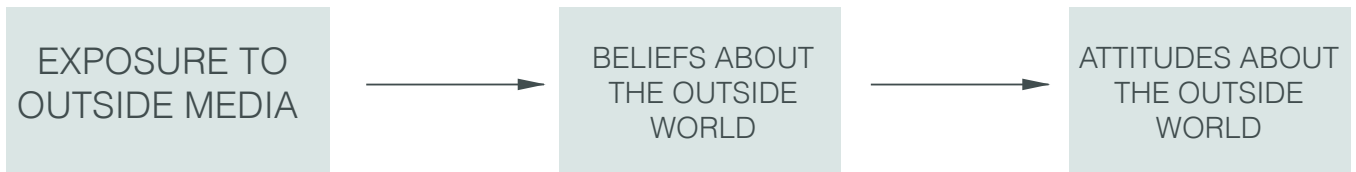
Figure 18: The Relationship Between Outside Media Exposure and North Koreans' Beliefs and Attitudes



All pathways presented in the model are statistically significant. Pathway coefficients denote the strength of relationships between constructs. They are not coefficients of correlation. A pathway coefficient of 0.5 between constructs A and B means an increase of 1 standard deviation in construct A would result in an expected change of 0.5 the standard deviation in construct B – the larger the number the stronger the relationship between the constructs.

OUTSIDE MEDIA EXPOSURE IS SYSTEMATICALLY RELATED TO NORTH KOREANS' BELIEFS AND ATTITUDES ABOUT THE OUTSIDE WORLD

SEM analysis of survey data collected from recent North Korean defectors indicates that those with exposure to outside news or entertainment media are more likely to be favorably disposed toward South Korea and the U.S. This confirms that outside media exposure positively impacts beliefs and attitudes about the outside world.



Statistically significant relationships were identified between exposure to outside news media and more favorable beliefs and attitudes about South Korea and the U.S. Entertainment media exposure was also found to have a statistically significant relationship to more favorable beliefs and attitudes toward South Korea and the U.S.¹³

For many North Koreans, broader and deeper exposure to outside media, which has accompanied the opening of the North Korean media environment since the late 1990s, appears to be counteracting some of the core messages of the North Korean propaganda apparatus about the outside world and may be providing some basis for the development of counter-narratives in the minds of North Koreans.

We were always trained to think that all of our problems were due to the U.S., but through foreign media or through travel abroad, some thought differently. They would say, 'Why blame the U.S.?' Or they'd comment sarcastically, 'Blame it on the U.S.!' when things were going wrong.

– 45 Female, Yongcheon, Left NK February 2010

Despite a clear relationship between outside media exposure and North Koreans' perceptions of the outside world, caution must be taken in interpreting these findings. North Koreans' ability to express such views in North Korea is extremely limited and their ability to act on them is almost nonexistent.

NEWS MEDIA AND ENTERTAINMENT MEDIA BOTH IMPACT NORTH KOREANS' BELIEFS AND ATTITUDES ABOUT THE OUTSIDE WORLD

The analysis reveals that exposure to outside news media has a statistically significant relationship to beliefs and attitudes about South Korea and the U.S. North Koreans within the sample who are exposed to relatively more outside news media have more favorable views about South Korea and the U.S. This validates one of the implicit assumptions of those sending outside news content into North Korea: that viewers and listeners are more favorably inclined toward the outside world.

The analysis also supports the hypothesis that exposure to entertainment media positively impacts beliefs and attitudes toward South Korea and the U.S.

Considered more broadly, because almost all entertainment media is introduced into North Korea through market mechanisms, the North Korean leadership undermines the effectiveness of its own domestic propaganda by failing to prevent de facto marketization.

I was told when I was young that South Koreans are very poor, but the South Korean dramas proved that just isn't the case.

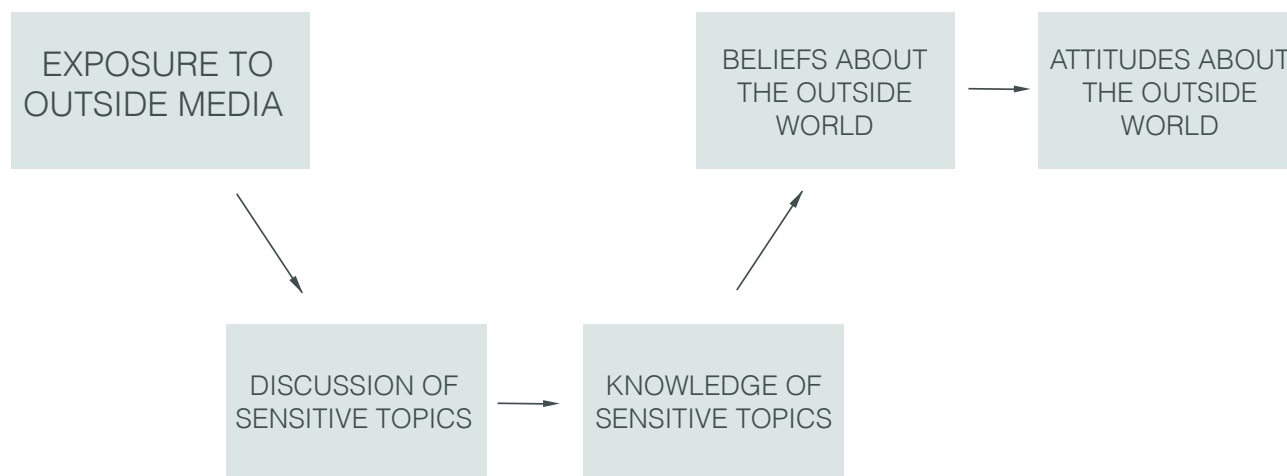
– 31, Male, Hyesan, Left NK January 2010

Furthermore, as research suggests the reach of outside entertainment media is rapidly growing in North Korea, it is reasonable to expect more nuanced and positive views of the outside world to become more broadly adopted.

THE INTERMEDIATE EFFECTS OF DISCUSSION AND KNOWLEDGE

In order to understand the influence of exposure to outside media on North Koreans' beliefs and attitudes, it is necessary to examine the role of perceived knowledge and interpersonal discussion about sensitive topics in amplifying exposure's direct effects.

Knowledge and discussion were found to have statistically significant relationships with both outside media exposure and beliefs and attitudes about the outside world. This results in a more complex and socially-informed relationship between exposure to outside media and beliefs and attitudes about the outside world.



Discussions with others about the outside world constitutes a significant path between media exposure and beliefs and attitudes. This reflects what appears to be the social process of opinion formation related to the outside world. As North Koreans seek to interpret and contextualize outside information in the absence of an open domestic media, information gathered through outside media is sometimes shared and discussed. Providing content to facilitate such sharing and discussion is perhaps one of the most powerful effects that outside information might have in North Korea.

These findings seem to suggest that outside media exposure is undermining the regime's vertical information hierarchies and facilitating the creation of horizontal connections between North Koreans discussing sensitive topics or alternative views to those of the regime. This could indicate that the horizontal isolation that the regime has relied on as a powerful form of control is eroding.

In addition to the indirect effect of discussion on beliefs about South Korea and the U.S. through knowledge about sensitive topics, there is also a statistically significant direct relationship between the discussion of sensitive topics and beliefs about South Korea. This will be explored later in the section.

Exposure to outside entertainment media has an effect on the discussion of topics related to the outside world. However, unlike exposure to news media, entertainment media exposure does not appear to have a significant effect on North Koreans' perceived knowledge of the outside world. This is understandable given that the content of entertainment media is generally less information-heavy and the reach of entertainment media is wider, meaning that those who are exposed to outside entertainment media may not consider themselves to be more well-informed than others inside North Korea.

PERCEPTIONS OF THE NORTH KOREAN REGIME ARE LESS DIRECTLY RELATED TO EXPOSURE TO OUTSIDE MEDIA

In addition to exploring relationships between exposure to outside media and North Koreans' perceptions of the outside world, the assessment also sought to shed light on whether or not exposure to outside media has an effect directly on North Koreans' beliefs and attitudes about the North Korean regime.

There does not appear to be a measurable direct relationship between exposure to outside media and North Koreans' beliefs and attitudes about their own regime. While there is a statistically significant relationship between discussion of sensitive topics and beliefs about North Korea, a statistically significant direct relationship does not exist between exposure to outside media and North Koreans' beliefs and attitudes about North Korea. This is true for both outside news and entertainment media exposure.

There are several possible explanations for this finding that may carry potential policy implications. Outside media's limited ability to report on events inside the country in a timely manner, a belief that outsiders are not trustworthy sources for information about North Korea and a lack of portrayals of the North in outside entertainment media may all account in part for the finding that access to outside media has no statistically significant systematic relationship to beliefs and attitudes about the regime.

Quantitative and qualitative findings suggest that the most regular consumers of outside media find it to be highly trustworthy. The most likely cause for the lack of a statistical relationship between outside media exposure and perceptions of the North Korean regime, therefore, may not be a problem of credibility but rather a problem of content.

While North Koreans who access foreign media regularly tend to believe much of what they see and hear, most foreign media is not able to directly address the realities of life in North Korea and thus does little to alter North Koreans' perceptions of their own regime.

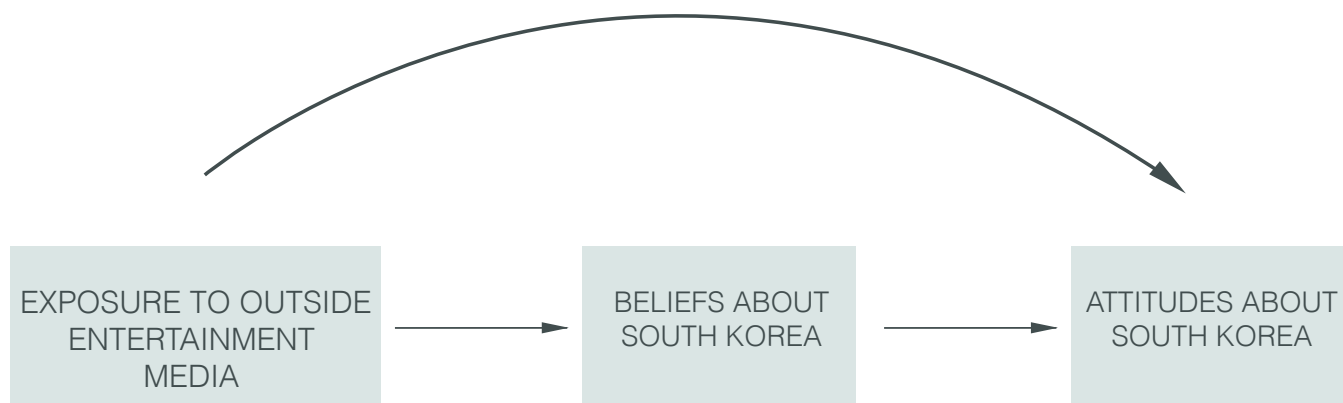
Foreign DVDs, produced for South Korean audiences, rarely focus attention on North Korea. Although foreign radio broadcasts often report on North Korea, their ability to report on domestic stories in a timely manner is limited. Their ability to report on local stories is nearly non-existent. While North Koreans who access foreign media generally find it far more compelling, the domestic media remains important for domestic political developments that are often difficult for outside media to report on. Furthermore, North Koreans' perceptions of their own regime are based on many other unrelated factors that may mediate the effects of outside media exposure. As Professor B.R. Myers argues, North Korea's official ideology is a complex system in which "the personality cult proceeds from myths about the race and its history that cannot but exert a strong appeal on the North Korean masses."¹⁴ Thus, outside media faces a greater challenge confronting North Koreans' perceptions of their own regime than it does North Koreans' less informed perceptions of the outside world.

Although outside media may have less singular ability to impact North Koreans' perceptions of their own regime, there is a systematic relationship between outside media and perceptions of the outside world. As qualitative interviews reveal, these perceptions can be very powerful when viewed in contrast to life in North Korea. North Korean authorities have long realized that even those living very difficult, dissatisfying lives in North Korea are less likely to oppose the regime if they are uninformed or frightened about the outside world. Changing beliefs about the rest of the world may naturally lead North Koreans to draw comparisons to their own lives.

ENTERTAINMENT MEDIA HAS A DIRECT RELATIONSHIP TO ATTITUDES ABOUT SOUTH KOREA

Both outside news media and outside entertainment media influence North Koreans' attitudes and beliefs about the outside world. However, there are some differences in the way news and entertainment media influence certain beliefs and attitudes.

The exposure → beliefs → attitudes pattern discussed earlier shows the way exposure to news media relates to attitudes. Information gathered from news media may contribute to a set of beliefs about a subject, which in turn can influence one's attitudes toward that subject. This is true of the effect that exposure to news media has on attitudes about South Korea and the U.S.



The pattern also most accurately describes the way in which North Koreans' attitudes about the U.S. are related to exposure to entertainment media. This would seem to imply that North Koreans are learning new things that are contributing to their beliefs about the U.S., which then influences their normative attitudes.

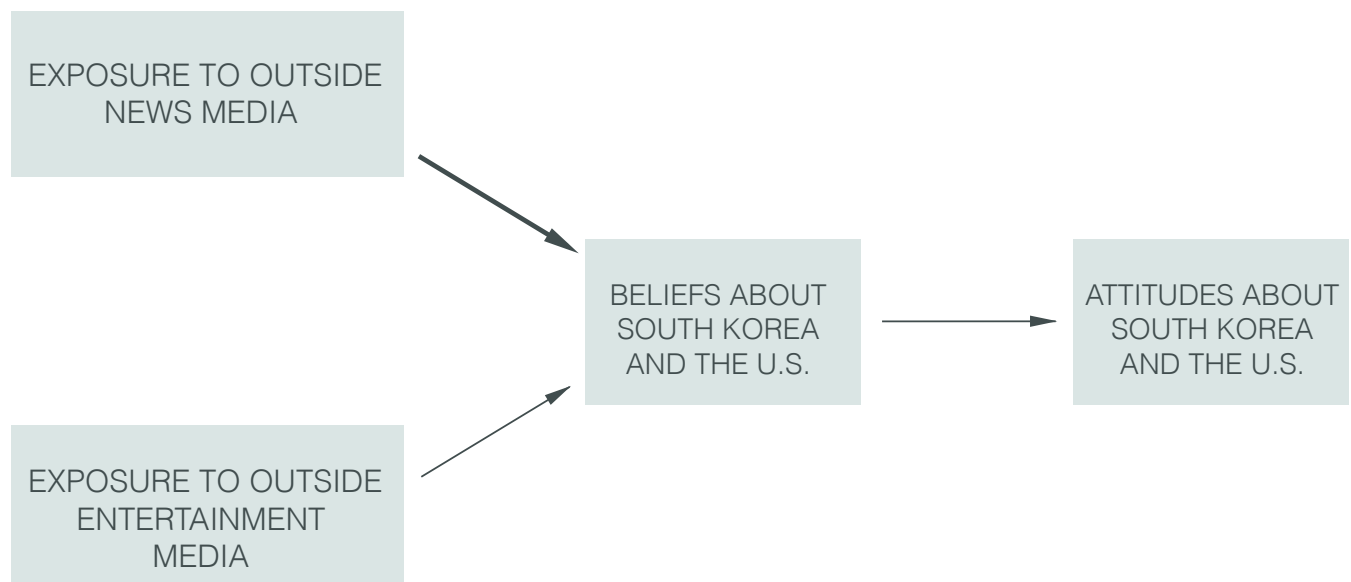
However, the exposure → beliefs → attitudes pattern is not the most robust explanation when we examine the effects of outside entertainment on North Koreans' attitudes about South Korea. The direct relationship between outside entertainment media exposure and attitudes about South Korea is stronger than the relationship between outside entertainment media exposure and beliefs about South Korea.¹⁵

Given the popularity of South Korean dramas and films in North Korea, and the natural closeness of the North and South Korean people, this comes as little surprise. It suggests that the way exposure to entertainment media influences North Koreans' attitude formation about South Korea is more immediate and less rational than the relationship between other types of media exposure and attitudes.

NEWS MEDIA IMPACTS NORTH KOREANS' PERCEPTIONS MORE THAN ENTERTAINMENT MEDIA

While the number of people who consume foreign entertainment media in North Korea is greater than the number who consume foreign news media, when the effects of outside news and entertainment exposure are examined together controlling for each other, we find that news media exposure exerts a greater influence on North Koreans' beliefs and attitudes.

As represented below, exposure to outside news media is more strongly related to beliefs and attitudes about South Korea and the U.S. than exposure to outside entertainment media.



While this does not diminish the impact of entertainment media, especially given its wider reach in North Korea, it does reinforce the notion that outside media exposure is often an additive process in which heavy users obtain unique and influential content from information-laden news media.

The more I watched foreign media, the more I wanted to tune in. At first I didn't think much of it, but soon I was hooked. Despite all the restrictions, I went around looking for DVDs. Then I started to listen to the radio more than watching DVDs. I felt like reality might not be accurately portrayed in dramas because they were fictional stories, but radio told the truth as it was...

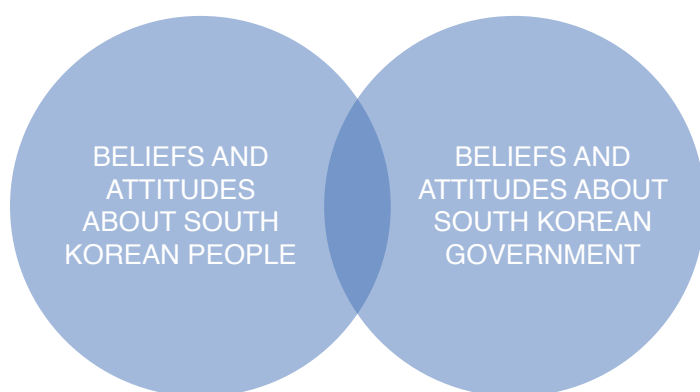
– 58, Female, Onseong, Left NK May 2010

News media provides more direct information from which concrete beliefs can be formed. The data suggest that the pattern of entertainment media exposure leading to news media exposure is becoming common in North Korea. Therefore, the primary role of news media in the North Korean landscape may be to provide those with initial exposure through entertainment media with the necessary information to reinforce their new or changing beliefs.

IN THE EYES OF NORTH KOREANS, SOUTH KOREA AND THE U.S. ARE VERY DIFFERENT

That North Koreans' perceptions of South Korea and the U.S. are very different may seem obvious, but it has some important policy and programming implications.

North Koreans can and do make clear distinctions between the South Korean people and the South Korean government and its policies. These differences clearly emerged when reliability tests were conducted on the beliefs and attitudes about South Korea prior to the modeling analysis. Beliefs about the South Korean people were strongly correlated with attitudes about the South Korean people, but not necessarily with the ROK government or policies. Conversely, beliefs about the South Korean government and its policies were correlated with attitudes about the government and its policies, but not necessarily with attitudes about the South Korean people.



North Koreans do not seem to draw such distinctions for the U.S. North Koreans' beliefs about the American people were not distinguished from the beliefs and attitudes about the U.S. government and its policies.

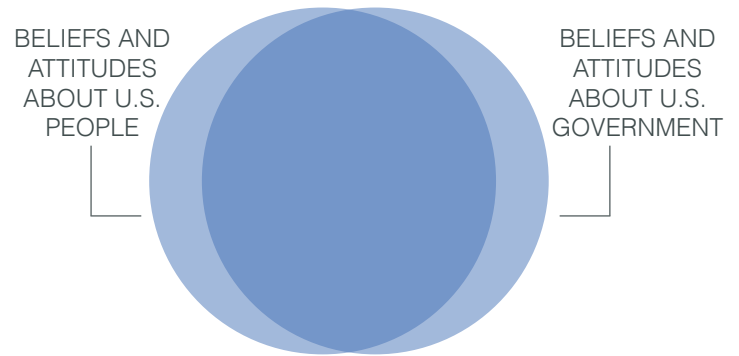
This is supported by qualitative interview findings, which consistently reveal that North Koreans have difficulty connecting with issues beyond the Korean peninsula, and has substantial implications for the effects of outside media on perceptions of South Korea and the U.S.

In addition to a lack of nuance in their perceptions of the U.S., there is also a lack of interest in the U.S. in general, particularly when compared with South Korea. Although North Koreans' discussions of sensitive topics is linked to their beliefs and attitudes about South Korea, such discussions have no significant effect on their beliefs and attitudes about the U.S. Qualitative interviews show that the U.S. does not come up often in North Koreans' discussion of sensitive topics, indicating that the U.S. is simply not a topic North Koreans are interested in discussing, at least not enough to directly influence their beliefs and attitudes.

I didn't know much about the U.S. We are only educated that Americans are bad people...I simply didn't have much interest in the U.S.

– 45, Female, Yongcheon, Left NK February 2010

While exposure to outside media (both news and entertainment) has a clear association with North Koreans' beliefs and attitudes about the U.S., nascent goodwill and interest toward the U.S. is quite low. These findings suggest that it is more difficult to inform and alter the opinions of North Koreans about the U.S. than it is to change their thinking about South Korea. This may be explained by a mix of predisposition, cultural familiarity, exposure and the content of North Korean propaganda narratives. The primary takeaway seems to be that perceptions about the world beyond the peninsula are significantly more difficult to alter than those about South Korea. Qualitative findings indicate that generally only content about the U.S. and the outside world with strong and apparent links to the peninsula has broad appeal within North Korea.



IN SUMMARY

Exposure to outside media impacts North Koreans' perceptions of the outside world. Like many of the findings in this assessment, this is evidence of a process and of the catalysts and drivers of that process. This finding reveals an opening of the information environment in North Korea in which the authorities are no longer the sole providers and interpreters of information. Greater availability of outside information in North Korea may be encouraging an increasing plurality of thought and opinion that in itself is likely viewed as a threat by the North Korean authorities, whose rule has traditionally been validated by the largely fictitious propaganda narratives they have created.

FOREIGN RADIO EFFECTIVENESS

I liked watching movies and dramas on the DVD player but I preferred radio. Radio broadcasts tell you factual information about today and tomorrow.

– 21, Male, Hoiryeong, Left NK April 2010

KEY FINDINGS

- Effective delivery of foreign radio content is the key necessary condition for listenership. Strong signals at appropriate times are the greatest determinant of listenership.
- Some targeted jamming by the North Korean authorities is occurring, but jamming is not widespread and credible. Foreign stations are often audible.
- North Koreans are becoming less passive radio listeners, expressing a greater degree of content preference.
- There is a significant audience multiplier for radio content through word of mouth. The spread of information from foreign radio station broadcasts to secondary non-listening audiences is largely a function of the usefulness or degree of interest listeners have in the content.
- North Korean listeners value new information, especially about the North Korean leadership and South Korea.



Assessing the effectiveness of foreign radio broadcast into North Korea is an important focus of this study. Since the mid-2000s, the field of broadcasters into North Korea has expanded. In addition to official government-funded stations such as Voice of America, Radio Free Asia and Korean Broadcasting System, independent broadcasters, some of which are funded by the U.S. government through DRL and the National Endowment for Democracy, such as Open Radio for North Korea, Radio Free Chosun, North Korea Reform Radio and Free North Korea Radio, also broadcast into North Korea. A significant portion of the U.S. government's programming resources designated for North Korea have gone toward funding radio broadcasts targeting listeners inside the country, so assessing and improving the effectiveness of these broadcasts is vital.

As was demonstrated in the General Media Environment section, there is a consistent, measurable listening audience for foreign broadcasts in North Korea. This section will attempt to go beyond audience estimates to further investigate today's foreign radio listening dynamics in North Korea. The term "foreign radio" will be used throughout this section to denote radio broadcasts in Korean that are not North Korean in origin. However, the focus of this research remains on U.S.- and South Korea-based broadcasts with programming targeted at North Korean audiences.

AUDIENCE DEVELOPMENT

Echoing the social and media environment changes discussed in the previous section, the behavior of radio listeners inside North Korea also seems to be evolving. Previous findings indicated that North Koreans were by and large passive radio listeners in that they would listen to almost any content they could receive and understand. That does not appear to be the case today.

While North Koreans still often listen to foreign radio under extremely adverse conditions, in which they must conceal their behavior and be careful to avoid detection, their expectations of what they will hear when they turn on the radio appear to have changed significantly over the past several years.

In the past when foreign radio listeners were asked what they would do if they heard something on foreign radio they found to be uninteresting or untrustworthy, a large majority reported they would simply keep listening. This finding contributed to the belief that North Koreans exercised little choice when listening to foreign radio. They would listen to whatever broadcasts in Korean they could find that were not North Korean in origin. In the 2010 BBG Traveler and Refugee study however, many respondents reported that they would search for more engaging or trustworthy programs if they found something to be uninteresting or untrustworthy.

This finding seems to indicate that North Korean foreign radio listeners have come to expect that if they tune away from one program other options will be available.

Broadcast audibility is a necessary condition for listenership, and North Koreans naturally listen far more to broadcasts transmitted on the most frequencies with the strongest signals. However, they appear to be becoming more discerning radio consumers who are now finding opportunity to express some limited degree of content preference.

JAMMING

North Korean listeners' expectations of finding multiple receivable stations at any given time is a reflection of the increased field of stations broadcasting into North Korea. It also reflects a lack of credible wide-scale jamming by North Korean authorities. North Korea does jam radio broadcasts. Recent reports from signal monitors on the Chinese border have indicated that some content-based jamming may actually be occurring. On the whole, however, many foreign stations appear to be getting through unaffected. The North Korean authorities appear to step up jamming efforts around significant events such as anniversaries or against specific broadcasts, but the huge power requirements may limit them from jamming on a wider scale.

AUDIENCE SEGMENTATION

Large gaps in education and access to foreign media are reflected in a high degree of segmentation within the audience for foreign radio in North Korea. Qualitative interviews suggest that radio content preferences among the well-educated elite, who have access to a variety of forms of outside media, are very different from the preferences of those with less education and less exposure to outside information.

In general, elite listeners rely on radio broadcasts for hard news and analysis unavailable in North Korea through other means. Elites are generally able to understand more complex analytical pieces than their less-educated countrymen. They also have access to other sources of media such as movies and dramas that serve as entertainment.

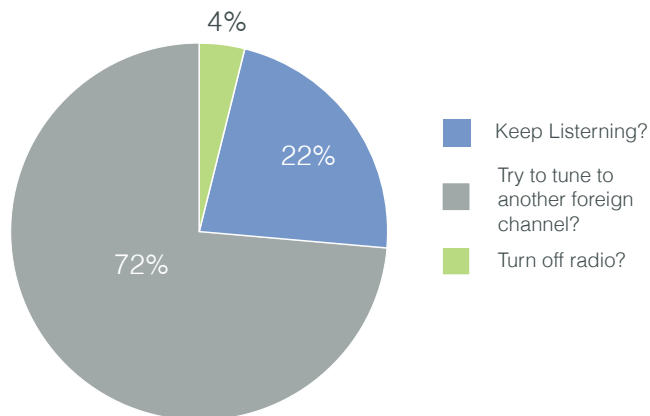
Qualitative research suggests that less-educated non-elites, rural North Koreans, and others who have difficulty understanding and relating to complex or unfamiliar news items tend to favor more cultural fare and entertainment programs, such as music, defectors' letters home, and radio dramas when they listen to foreign radio.

The large gap between the comprehension levels, background knowledge and content preferences of North Korean listeners makes it difficult for a single broadcast to appeal to a broad range of North Korean audience members.

This natural audience segmentation, along with signs that listeners take advantage of the expansion of the field of broadcasters into North Korea by exercising content preferences, supports the notion that the North Korean radio audience can support, and indeed calls for, more niche broadcasts sending more specifically targeted content into North Korea.

Figure 19
When you hear something uninteresting
on a foreign channel do you...

(Percentage of foreign radio listeners)



BBG Survey of North Korean refugees/travelers (2010 n=250)
carried out by InterMedia
Base: 68 foreign radio listeners

DELIVERY

Accessibility and content are the two main determinants of foreign radio stations' audience reach in North Korea. Accessibility is necessary for listenership, as a weak or inaudible broadcast will simply not be heard. This is especially true in North Korea, where listeners rarely know the frequencies of broadcasts and instead find stations simply by turning their radio dial until they locate an audible broadcast in Korean. Listeners may then choose to listen to broadcasts based on the content among those that are audible. Meeting the condition of audibility is the most important task for stations broadcasting into North Korea.

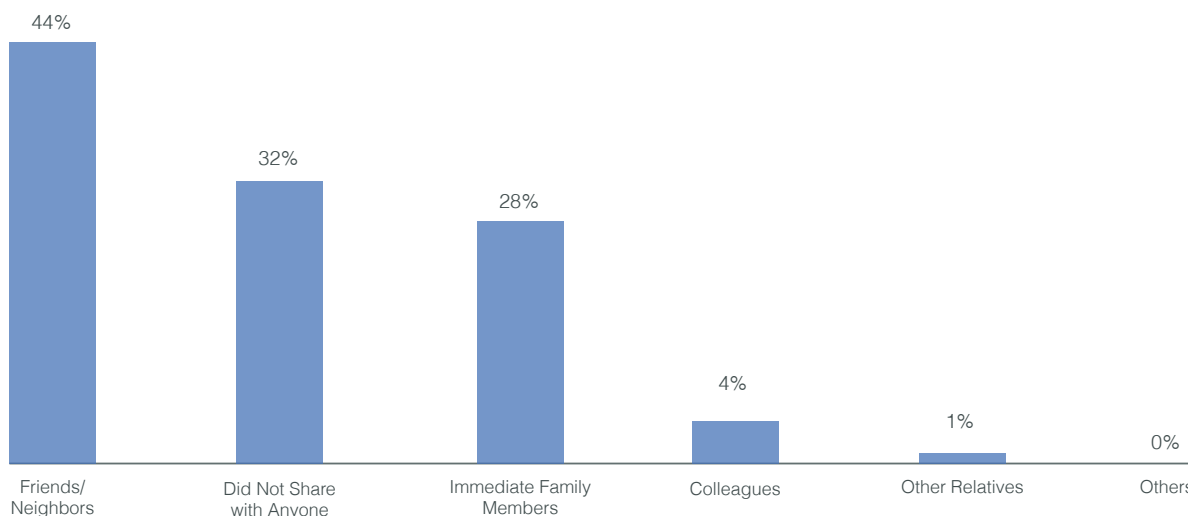
SHORTWAVE VS. AM BROADCASTING

There has been considerable debate over the relative effectiveness of shortwave (SW) versus medium wave (AM) broadcasting into North Korea. Generally speaking, a mix of strong SW and AM gives a broadcaster the greatest chance of being heard inside North Korea. However, there are some differences between the two bands that are important to note as broadcasters attempt to maximize their budgets for broadcast delivery.

The primary advantage to broadcasting on AM is making broadcasts available to North Koreans without access to a shortwave radio. More North Koreans have access to AM-capable radios than to shortwave radios, although inexpensive, free-tuning, shortwave-capable radios are making their way into North Korea from China. Broadcasting on AM gives those without SW radios the opportunity to receive foreign broadcasts without the necessity of purchasing or owning an illegal free-tuning SW radio.

Shortwave remains important in North Korea, as it can be broadcast over extremely long distances. It does not require transmitters near North Korea, which are expensive and often politically difficult to lease. Shortwave signals can also be more difficult to jam because shortwave frequencies tend to modulate. Because very few North Koreans know the specific frequencies of foreign broadcasts, modulating frequencies are not an impediment to listening for most North Koreans.

Figure 20
With whom did you share news and information heard on foreign radio?
(Percentage of foreign radio listeners)



BBG Survey of North Korean refugees/travelers (2010 n=250)
carried out by InterMedia
Base: 68 foreign radio listeners

SECONDARY AUDIENCES FOR RADIO BROADCASTS

If we consider the process through which a piece of unique information broadcast via radio into North Korea reaches North Koreans, both direct accessibility of the broadcast and saliency of the content are important. As was noted in the General Media Environment section, for the majority of North Koreans, word of mouth is the most important source of information, and information listeners receive over foreign radio is sometimes passed on this way to others in North Korea.

While accessibility is important to direct listeners, the spread of information broadcast by foreign radio stations to secondary, non-listening audiences is largely a function of the usefulness of or degree of interest listeners have in the content. A broadcast that is both accessible and has content that is engaging and useful to audiences in North Korea has the potential to extend the information it delivers well beyond its primary listening audience.

Although North Korean listeners are starting to exercise greater content preference, as Figure 19 illustrates, accessibility is the primary determinant of direct listenership. North Koreans listen under difficult circumstances and generally cannot plan their listening behavior with advanced knowledge of broadcast content. Therefore, good content may not have strong direct pass-through to higher direct listening audiences, as one would expect in an open media environment. However, unique, useful and interesting broadcast content has a high probability of being passed on to secondary audiences.

CONTINGENCIES

Maintaining a strong radio presence is of great strategic importance. With the recent death of Kim Jong-il serving as a clear reminder of how quickly things in North Korea could change, preparedness for contingencies is perhaps the strongest single argument for the importance of radio broadcasting into North Korea. As noted above, radio remains the only feasible and credible way of delivering information to North Koreans in real-time. In the event of an emergency, important information could be broadcast immediately to a preexisting listening public within North Korea who would then effectively spread the information further. Even if DVDs and other media replace radio as a source of entertainment and news in the future, maintaining a radio broadcast presence in North Korea is of genuine strategic importance to the U.S. and South Korea.

ELITES AND NEW INFORMATION TECHNOLOGIES

[The kind of media people can get has] definitely changed. With one USB stick, at least three people can watch Korean movies. These days when merchants from China send VCR/DVD players, they have an additional USB function.

– 47, Male, Pyongyang, Left NK August 2010

KEY FINDINGS

- Despite increasing marketization, traditional political elite enjoy special status and privileges in North Korea.
- Marketization forces have allowed for the rise of a relatively new class of economic elites and have enabled a limited degree of social mobility.
- Elites generally enjoy access to more sources of outside information and developed social networks, both leading to a greater degree of knowledge about the outside world.
- Elites are the earliest adopters of new technologies such as computers, USB drives, MP3 players and mobile phones that are now entering North Korea from China.
- Such advanced media devices allow their owners to access foreign materials more readily and more safely than ever before.
- Steady growth in the popularity of these items inside North Korea is clearly reflected in the survey data.
- The proliferation of illegal Chinese mobile phones along the Sino-North Korean border has made direct contact with the outside world more possible and has greatly increased the efficiency of cross-border trading, remittances and defection.

WHO ARE THE ELITES?

This section of the report looks more closely at North Korean elites. In a society as top-down as North Korea, it is important to understand elites, as they retain the decision-making powers and financial wealth. For those with hopes of promoting change through media, it is essential to grasp how these decision-makers gather and process information.

Elites are important early adopters, who have the means to acquire and use advanced technologies. This results in media behavior patterns that are different from those of other North Koreans. A closer look into the elite subset is necessary to better understand the different levels of information available at different levels of North Korean society. This involves an examination of elites' information behaviors and demands, and the potential impact that outside media can have on this group.



North Korea's secretive nature and highly stratified social structure have long made it difficult for outsiders to clearly define the term "elite." In the past, elites were those who benefitted either directly or indirectly from connections to the country's top leadership. This definition has been confused by the rise of a class of economic elites, who through their financial success have managed to gain access to some of the traditional hereditary elites' privileges despite lacking their strong family and ideological background.

HEREDITARY AND POLITICAL ELITE

Each member of North Korean society is classified into one of three categories according to their political loyalty: the "core class," "wavering class," or "hostile class." These categories are further broken down into 51 subcategories. North Korean Researchers Kongdan Oh and Ralph Hassig claim that the core class comprises 25 percent¹⁶ to 30 percent¹⁷ of the North Korean population. Among these are what Kookmin University Professor Andrei Lankov calls the hereditary elite: "those with immediate male ancestors who contributed toward the foundation and strengthening of the Kim family regime; descendents of anti-Japanese guerillas, heroes of the Korean War, or party bureaucrats."¹⁸ Interviewees confirmed this description and elaborated, adding relatives and friends of the ruling Kim family.

Interviewees had a clear sense of their own social status and classification. Clear indicators of one's social status were family background, party membership, occupation, and receipt of rations and gifts from the state. These indicators are interconnected and impact each other to determine a person's classification in the North Korean caste system.

Collectively, these indicators can be considered Songbun (background) and Todae (foundation). One defector differentiated between Songbun as “background referring to the entire family” and Todae as the “foundation referring to the wealth and prestige of one’s parents” (43, Male, Sariwon, Left NK November 2009). He noted, however, that they are essentially the same “since those who come from good families also have good foundation.”

This is not surprising because, as another interviewee noted, parents’ “power and influence are passed down to their children and then to generations beyond them.” (47, Male, Pyongyang and Hyesan, Left NK February 2009). Songbun and Todae determine membership in the Korean Workers’ Party, acceptance into top universities, favorable work assignments, and job promotions and awards.

Although some elites characterize party membership as being more of a nuisance than a benefit, membership in the party was still considered advantageous by most interviewees due to the degree of immunity it imparts and to the respect given to party members.

...The Korean Workers' Party is the party in power, so party officials are considered the best. Even the law can't touch paid party officials. The party's internal organizing committee may inspect me, but the police can't do anything to me. Because of this trust and respect, people work as party officials, even though it's hard. In reality, I haven't made any money from being a party official, but when a party official passes by North Korean people, they bow to you at a 90 degree angle. I lived off of that respect.

– 44, Male, Chongjin, Left NK November 2010

Party secretaries in North Korean organizations and institutions have more real power than the highest ranking non-party person. In workplaces such as universities or mines, the highest ranking person may be the dean or general manager, but the most powerful person is the party secretary.

Technically, the general manager ranked higher, but because everything had to be done under the party's approval, the party secretary had a lot of power. Because they hold such power, they are usually more corrupt as well.

– 57, Male, Musan, Left NK January 2010

As party members often wield real decision-making power, many North Korean experts consider party membership to be a criterion for elite status. According to Kim Yoo-Hyang, team leader of the Culture, Media and Telecommunications team at South Korea’s National Assembly Research Services:

In North Korea, the ruling class is the core military and KWP personnel, including Kim Jong-Il's family. Academics...are not considered elites in North Korea despite being categorized that way in other countries. They are considered intellectuals, and if anything, a type of powerless, but intellectual elite. The elite only include those with power.

– Kim Yoo-Hyang, Culture, Media, Telecommunications Team Leader, ROK National Assembly Research Service

SOCIAL MOBILITY: HEREDITARY ELITE VS. ECONOMIC ELITE

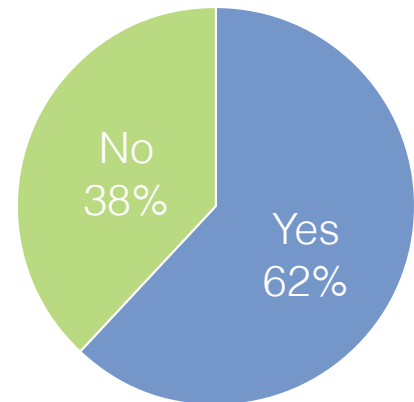
The current system strictly limits social mobility within North Korea, but there is evidence of some movement. Downward mobility has always been a real and serious possibility, applicable to anyone at any moment for real or arbitrary reasons. This threat is most relevant to elites who have power or status to lose.

I am married, and because of my mother-in-law and sister-in-law who escaped to South Korea, my family were branded as traitors. I had to live under severe surveillance of the State Security Agency and the Ministry of Public Security, which impelled me to escape from North Korea. Also, I was very unhappy about the fact that I could not join the party [because of my family].

– 40, Male, Hwanghaebukdo Baecheon,
Left NK March 2011

Figure 21
Aside from your official profession,
were you also engaged in business
or trading?

(Percentage of total sample)



BBG Survey of North Korean refugees/travelers (2010 n=250)
carried out by InterMedia
Base: 250

Unlike downward mobility, upward mobility is extremely difficult to achieve in North Korea. Thus, despite some changes, including the increased importance of money in North Korea, upward mobility in status is still rare.

The recent emergence of markets in North Korea has meant a decrease in dependence on the state, which is no longer the principle source of food. Furthermore, as Professor Lee Woo-Young of Kyungnam University's Graduate School of North Korean Studies notes, it has permitted "competent individuals [to] create new space for themselves in the existing social strata" and gain wealth from the markets. Individuals profiting from the markets have begun to emerge as a new social class with traits similar to the elite. Professor Andrei Lankov refers to this group as the "Nouveau Riche" while Professor Lee Woo-Young calls them "North Korean capitalists."

The rise of the economic elite is an example of upward mobility free from the confines of Songbun and Todae. It marks an important change from the past and suggests more flexibility in the system. However, a closer look reveals that upward mobility is still very limited, as economic means do not translate into political power past a certain point. Family background may have decreased in significance generally, but it still does "come into consideration when people get promoted to higher ranks" (– 51, Male, Pyongannamdo Bukchang, Left NK August 2010). Those who have excelled economically still have almost no chance to buy into the ranks of the traditional political elite in the current system.

A majority of the elite interviewed in this study agreed: Songbun and Todae remain the ultimate determinants of access to power, particularly at the uppermost levels of North Korean society. They provide some with direct pathways to success while simultaneously functioning as a glass ceiling for others. A glimpse of how this dynamic works is seen in the extensive background checks still required for key job appointments:

[For certain positions,] you can rise up in the ranks as long as your father's side is good because they don't look at your mother's side. [But] there's a separate group who do get their mother's side checked. For example, if one wants to go as high as the Secretary Bureau of the Central Party Committee, then policy requires also checking up to a certain number of relations in his maternal family. Before, they used to examine up to fourth cousins, but they reduced it after the Arduous March. The Ministry of Public Security and the State Security Agency used to check up to third cousins, but now the MPS only looks as far as paternal cousins and the State Security Agency continues to check up to third cousins, but only on the father's side. And if the person has a family, then they only look at his brother-in-law, father-in-law, and mother-in-law.

– 26, Male, Pyongyang, Left NK January 2010

I used to think that anyone could become a part of the elite if they tried hard and studied enough, but after working at the Broadcasting Committee, I realized that first and foremost, you have to have the right connections. It's all about whose daughter/son you are or where you're from. Even if you try your best, there's only so much you can achieve.

– 32, Male, Pyongyang and Hamgyeongnamdo Leewongun, Left NK August 2010

Based on the qualitative interviews conducted for the assessment, dynamics between the hereditary elite and economic elite, to this point, have been largely mutually beneficial. Both seem to have benefitted economically from their newfound relationship by protecting each other's interests. It is unclear, however, if conflicts have arisen or if both sets of elites generally feel unthreatened by each other and satisfied with the current circumstances.

For economic elites, profiting in North Korea without the protection of good political status requires constant bribes. Even when they do succeed economically, economic elites still face defined limits on their success and ability to climb North Korea's social hierarchy. Some economic elites reported growing tired of having to make frequent bribes to the authorities. Others were devastated after the 2009 currency redenomination. For others still, intense psychological pressures and fear of punishment for the semi-legal nature of many kinds of businesses contributed to a sense of unease despite their economically advantaged position.

We ate three times a day, but we were always worried because if situations continued the way they did, our lives would have been jeopardized as well. Sometimes we felt like we were stable but we were always restless because of economic instability. It led us to consider smuggling.

– 42, Female, Pyongyang, Left NK January 2010

Others also shared the ways Songbun and Todae limited their success and advancement, expressing bitterness for such constraints despite loyal service and dedication. Interviewees noted a clear line of distinction on the social ladder. Defectors were very aware that those with bad Songbun could never rise above the level of an administrative official.

SOCIAL NETWORKS

Networks of hereditary and economic elites provide profitable economic opportunities and protect those involved from the potential repercussions of engaging in lucrative but illicit activities. A majority of elite interviewees in the study were involved in private businesses motivated by a variety of reasons. Some were Central Party members whose jobs did not guarantee payment of proper wages despite their privileged status. Others participated to make extra money as insurance against emergencies or unexpected situations.

My living situation was not difficult because I was working at the power distribution station, but since it's always better to have more money, I also sold goods in the market.

– 33, Male, Hamgyeongbukdo Musan, Left NK October 2010

Preexisting social networks help elites become involved in private business. Some security officials, for example, know networks of traders because they are responsible for the surveillance, censorship, and punishment of those people and activities. Some traders forge strategic relationships with security officials because of their power to protect traders and grant them authorization to travel freely. Security officials are offered bribes and opportunities for trading partnerships.

My financial situation was good. To expand my business, I did business with people in the Security Department and the Police Department.

– 40, Male, Pyongyang and Pyonganbukdo Pyongsong, Left NK December 2010

North Koreans with family in China or who knew someone with family in China could often collaborate with them to secure goods to smuggle into North Korean markets because travel permits were granted to those with relatives across the border. In addition, a surprising number of women in close proximity to security agents and the military were engaged in economic activities because they had access to the appropriate networks and resources. Women also formed business networks with other women by taking advantage of preexisting friendships. Social networks of elites increase interdependence between the hereditary elite and the economic elite and ultimately allow class self-preservation and guarantee the safeguarding of their privileges.

I was not a party member, but my husband was. From 2003, we received industrial goods from Chinese tourists or merchants and sold them in bulk to middlemen in Chongjin and Hamheung. I worked under a system where I passed merchandise on first, then payment was sent later after receipt...I got into this business through my husband – he introduced me to people. He knew them because he was part of the team that conducted crackdowns; a lot of Chinese tourists and merchants were caught.

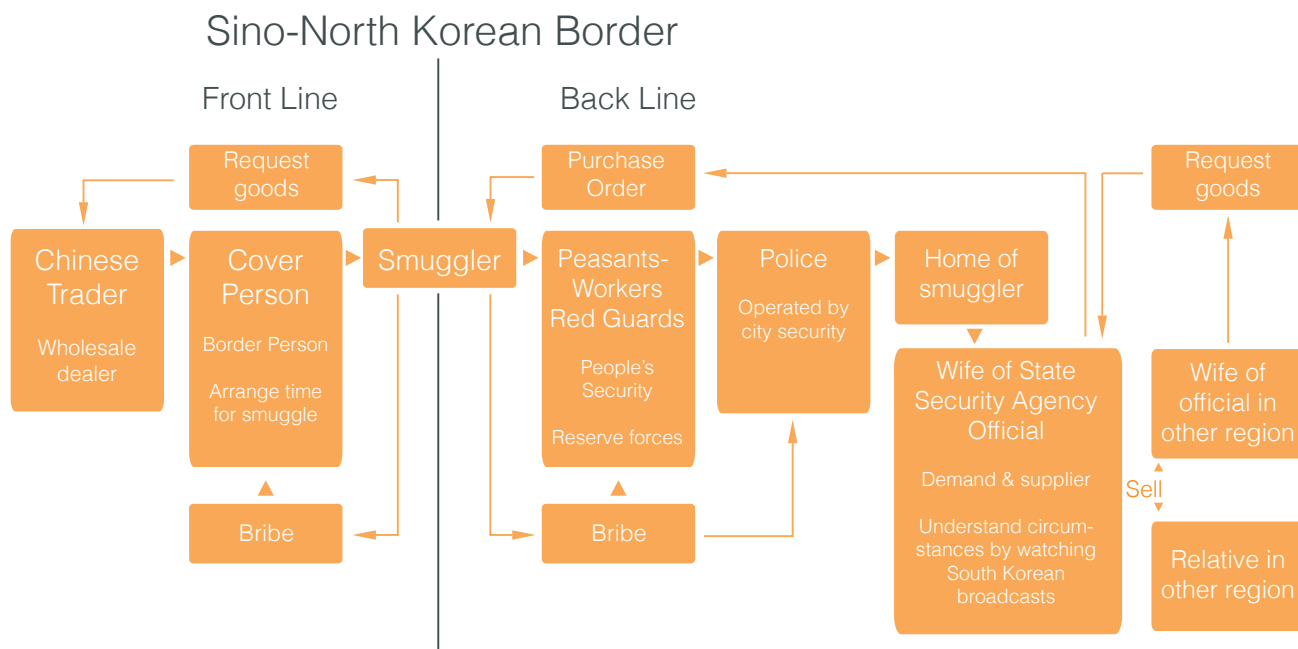
– 53, Female, Hamgyeongbukdo and Pyongyang, Left NK April 2010

I was a party member. I didn't openly conduct any business, but because there were a lot of stations that the State Security Agency guard moved around, I used those. I asked to be notified when products and items arrived at a base, and a few times I loaded them into a car and took them elsewhere to resell. In North Korea, the military people have no money...so even military families secretly conduct business a lot. Even military people that live in Pyongyang would say they're taking a vacation somewhere or going to get medical treatment in a different province, but will actually be doing business for a few months. After doing business and returning to Pyongyang, they would have to report to daily criticism sessions and get criticized and yelled at if someone raised an issue over it, but they still do it.

– 48, Male, Pyongyang, Left NK August 2010

Figure 22 provides an example of how these social networks actualize. It is taken from a detailed study of smuggling networks along the Sino-North Korean border by Kang Dong-Wan and Park Jeong-Ran. In their book *Hallyu Shakes North Korea* they describe one interviewee's smuggling network, revealing a glimpse of the social networks, product distribution routes, and potential information routes involved in market activities.

Figure 22: An Example of a Cross-Border Smuggling Network¹⁹



Many elites in the Chinese border region, especially those involved in business, regularly use or own illegal Chinese mobile phones for business purposes, defection brokering purposes, and/or to speak to family abroad. Phone conversations with trustworthy contacts have increased the level of information North Koreans have about commodity prices, sudden developments and crackdowns, and life outside North Korea. The use of illegal mobile phones is still highly dangerous in North Korea, but comments from interviewees reflected a growing sentiment that business-related information communicated via mobile phones, while sensitive, is often overlooked if the appropriate bribes are made or connections established.

We don't listen to the radio to hear the exchange rate; we call someone in China on our mobile phones for that. And if the situation gets tense a Chinese person will tell us, 'It's getting tense, so be careful.'

– 40, Male, Pyonganbukdo Pyongsong and Pyongyang, Left NK December 2010

Interviews also showed that North Korean elites generally turn first to reliable people and then to the radio as their main sources of credible information for conducting business. Both firsthand and secondhand information are considered trustworthy, in particular from those who had personally visited abroad or had heard stories directly from family. Trusted friends who were Chinese, lived in China, or had personally visited China also were considered trustworthy.

My parents had many relatives living in China, and my mother frequently shared information she gathered while she traveled to and from China. She knew a lot of information about South Korea.

– 55, Male, Pyongyang, Hamgyeongnamdo, Left NK May 2010

In addition to their value as a source of new information, these networks were critical in confirming or refuting information accessed through different media devices. The North Korean elites interviewed often cross-checked information through multiple media platforms as well as word of mouth to verify its credibility.

Everyone thinks highly of South Korea. They know that China is well off, but that South Korea is even more developed. I became sure of this after asking my relatives and cousins in China whether or not what I had seen and heard in South Korean dramas were true; they said it was.

– 57, Male, Hamgyeongbukdo Musan, Left NK January 2010

Aside from information accessed through word of mouth, some interviewees also claimed that some types of information available through radio were pertinent to their business activities. Some traders noted that information about exchange rates, commodity prices, and events with the potential to produce shocks to the North Korean economy were important to know to stay ahead.

I listened to the radio firstly because I wanted to hear political content, and secondly because of my market activity. For instance, if I heard that there would be several tons of rice coming in from South Korea, I knew that the market price for rice would go down. In particular, market sellers listen to find out about economic shocks or exchange rates. Even when medical supplies or fertilizers come in, there is a shock to the market, so you have to predict that and adjust the prices in order to sell successfully in the market. Even though average people don't think of these things, the big players in the market do. And I listened to the radio to learn more about the political relationships between North and South Korea.

– 44, Male, Hamgyeongbukdo Chongjin, November 2010

INFRASTRUCTURAL ADVANTAGES AND MEDIA HABITS

In addition to using wealth to maintain good relations with other elites, many of the elites interviewed spent their economic means to acquire luxury goods. Some products purchased by the elite have begun to emerge as status symbols, including flatscreen TVs, washing machines, refrigerators, and computers, especially laptops. These products are expensive and hard to obtain in North Korea, and require further financial resources for the large amount of steady electricity needed to use them.

Acquiring goods is easier for elites than for other North Koreans because of their personal connections. It is also easier because of the convenient infrastructural considerations provided by North Korea's markets, trading routes, and product distribution channels which cater to the elites. Products are smuggled through the border from China and then distributed to various parts of the country, but in particular to areas with high demand. A significant population of people with disposable income is a necessary requirement of high-demand areas. North Korea's geography and current market mechanisms suggest that these areas include border cities, Pyongyang, and a few other large cities in other provinces. One defector's comment sheds light on the infrastructural advantages available to elites:

As I sold used televisions, I realized that it was easier to circulate South Korean CDs in Pyongyang. People who have big businesses in Pyongyang move products in large containers, which is ideal for CDs. Most of the larger merchants are all in Pyongyang and Pyongsung, which has the largest market. It is a wholesale market with a direct route from Sinuiju so there are a lot of goods being transported back and forth, and there are a lot of South Korean products including CDs.

– 47, Female, Pyongyang, Left NK January 2010

Another way elites can leverage infrastructural advantages for media device usage is by securing a constant flow of energy for their electronic goods. This is possible when elites live in close proximity to an institution or factory with constant electricity, such as power distribution centers and coal mines. Elite interviewees said that they often bribed officials of these institutions for a constant supply of energy to their homes which allowed for uninterrupted use of electronic media. When such infrastructural advantages were not present, most of the elites interviewed used batteries to supplement the electricity distributed by the state.

Luxury goods in North Korea include media devices, which are coveted as sources of entertainment and information. Elites' wealth affords them the ability to purchase media devices, the time to enjoy them, and the means to evade punishment if caught. Furthermore, elites can afford officially approved new technologies and have the resources to learn how to use them.

The exorbitant registration and user fees initially limited North Korea's domestic Koryolink mobile phones to the very wealthy, though recently their reach has begun expanding. USBs are growing in popularity and are beginning to affect how information is shared amongst the elites. USBs are widely used in academic institutions for various legitimate purposes but also are used for illegal activities such as the exchange of South Korean music, movies and dramas. USB users noted their convenience not just because of their compactness, but because it was possible to delete sensitive materials without leaving a trace. A few respondents used MP3 players to learn foreign languages such as English and Chinese, and it was evident that some parents purchased new technologies for their children to aid in their studies. However, interviews revealed the devices were often used to watch or listen to South Korean dramas and music as well.

Recently, elite youth have captured the attention of those promoting greater freedom of information inside North Korea. Many believe that these heirs to the North Korean leadership possess the potential for a changed North Korea because of their unprecedented access to outside information, exposure to the power of money, dependence on the market system, and lack of experience in North Korea's "glory days." Armed by their parents with new technologies and a sense of relative immunity, it appears as though elite youth are beginning to push the boundaries of approved behavior more than other groups within North Korea. Defectors have testified that elite youth share South Korean music and dramas on USBs and MP3s on their home and school computers. As one respondent noted,

...more laws are broken by powerful families while children of an average family would not dare to break the law. As the children of officials kept breaking the law, a new policy came out around 2005 stating 'a revolutionary father does not translate to a revolutionary son'...but the trend of them breaking the law has not been fixed despite multiple orders having been issued.

– 42, Female, Pyongyang, Left NK January 2010

Elites' children's reckless behaviors do sometimes lead to serious punishment of their parents, including dismissal from posts and exile.

There was an instance when the director of the education department in Samjiyeon county party council was punished. It wasn't because of foreign broadcasts but because his daughter was caught watching a South Korean DVD and because there were about 2-3 inspectors it was difficult to keep the news on the down low.

– 61, Male, Yanggangdo Hyesan, Left NK January 2011

Like elite youth, elite adults often access media devices together, either because they find it more enjoyable watching with others such as their family or as a method of precaution, especially when those watching together are security officials.

The Director of the 109 Group [an illegal video material censorship team comprised of party, state security, and public safety officials] wouldn't be able to come and inspect our house because I would be watching South Korean dramas with a Director of the Escort Bureau [Ministry of Public Security] and a high-level member of the State Security Agency.

– 55, Male, Pyongyang, Hamgyeongnamdo, Left NK May 2010

Generally, despite a heightened sense of security because of their social networks and financial wealth, the elites interviewed were still cautious in both their illegal market activities and outside media access, reflecting that punishment was still a real concern. Some reported discontinuing their media activities and eliminating the devices altogether because fear of reprisals outweighed the benefits of access. For others, great precautions were taken to avoid getting caught, ranging from traditional methods to more unconventional ones.

It's not easy to use a mobile phone. In order to make sure the mobile phone frequencies are not being tracked, I would fill up a washbasin with water and put the lid of a rice cooker over my head while I made a phone call. I don't know if it worked or not, but I was never caught for using a mobile phone. If you're caught, you have to pay a heavy fine, and could be expelled [out of Pyongyang].

– 28, Male, Pyongyang, Left NK November 2010

It is important to note that while crackdowns have increased at the official level and the 109 Group has remained active, the level of reporting by North Koreans on each other seems actually to have decreased. Anecdotal evidence finds that increasing numbers of North Koreans feel safe enough to watch outside media with their very trusted family and friends, albeit while still taking many precautions. This is an important development from the time when one would not dare to reveal outside media consumption to anyone for fear of being reported.

Crackdowns are extreme these days but it is not like the past since very few people intentionally go to report someone.

– 30, Male, Pyongyang, Left NK October 2009

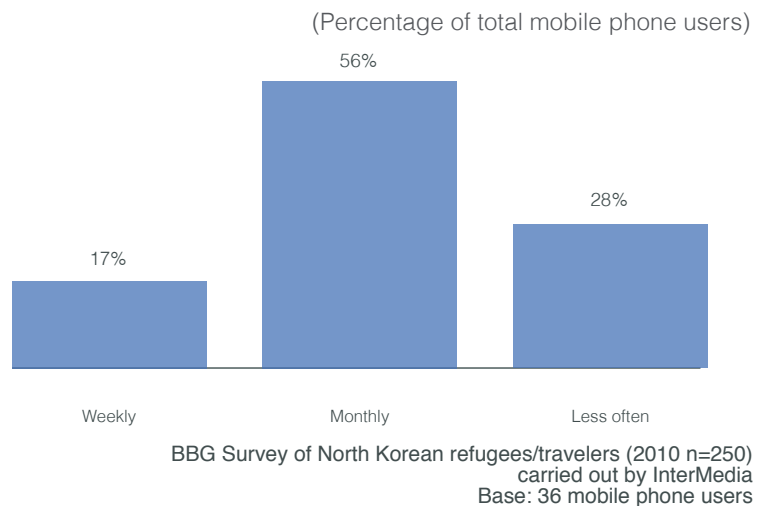
NEW INFORMATION TECHNOLOGIES

Marketization in North Korea, the proliferation of inexpensive Chinese-made high-tech consumer goods and significant cross-border trading have made it possible for some North Koreans to obtain advanced media devices such as mobile phones, computers, MP3 players and USB flash drives. The entrance of such devices into North Korea has been a source of great interest to academics and policy-makers focused on North Korea.

MOBILE PHONES

Much has been reported about North Korea's still relatively new domestic mobile phone service, provided by the Egyptian firm Orascom, which as of June 2011 claimed to be providing service to over 600,000 North Koreans throughout the country. The expansion of a nationwide domestic mobile phone network is an important development that North Korea watchers should continue to monitor closely. A brief overview of the official Koryolink network is provided in Appendix 4.

Figure 23
How often did you use a mobile phone?



However, the official network is closely monitored by the North Korean authorities and people with Koryolink phones are unable to make international calls or access the internet from their mobile phones. For the purposes of this assessment we focus on mobile phones that can make international calls as they have greatly affected the economy and information environment along the Chinese border areas and by extension in much of the entire nation.

Fourteen percent of respondents in the 2010 BBG Refugee and Traveler Survey used a mobile phone in North Korea. With the exception of one respondent who had a domestic Koryolink phone, all those in the study who had made mobile phone calls in North Korea used illegal Chinese phones, primarily in order to place international calls.

Use of illegal Chinese mobile phones is limited by geography, as callers must remain in range of Chinese mobile towers to receive service. Their use is also limited by fear of punishment, as illegal mobile phones remain among the most sensitive media devices in North Korea and punishments can be severe if a user is caught. Yet despite these restrictions, the proliferation of Chinese mobile phones along the Sino-North Korean border has had a large impact on trade, defections and the general flow of information in and out of North Korea.

Illegal mobile phones aid cross-border business transactions immensely and Chinese traders often purchase phones for their North Korean counterparts to facilitate transactions. North Korean authorities' recognition of the necessity of illegal mobile phones for cross-border business may have prevented them from wider or more effective crackdowns of mobile phone use along the border. At the very least, profit from cross-border business allows those using mobile phones for business transactions to pay bribes to security personnel to avoid punishment and continue use of their phones.

I used a Chinese mobile phone quite frequently. I brought one from China. There are mobile phones sold on the black market in North Korea, but I had a lot of friends that were Chinese guards. I just brought over a phone that had belonged to my friend. I would ask my friend to top up my phone, and I would be able to use it in North Korea. I've never seen a North Korean mobile phone. For a period of time, I sold used Chinese mobile phones to people in Pyongyang for 100 USD. I never lent my phone to others because I would go to jail if I was caught.

– 60, Male, Hamgyeongbukdo Onsung, Left NK February 2010

Illegal mobile phones have also had a significant impact on the flow of remittances into North Korea and on the process of defecting out of North Korea. As discussed later in this section, 31 percent of respondents who at the time of the interview were mostly refugees in China were in contact with someone in North Korea. The ability to stay in contact with relatives, friends and brokers in North Korea has allowed refugees and defectors to arrange for speedy well-planned defections of friends and family, and has shortened the time it takes to send remittances into North Korea to mere minutes.

Illegal mobile phones have a significant impact on the flow of information in and out of North Korea. Though reports are often difficult to source or confirm, mobile phones have allowed some organizations based outside North Korea to create stringer networks in North Korea that have made it possible to collect information from inside North Korea directly. Mobile phones, which have allowed some North Koreans to speak directly to those outside the country, have also contributed to the flow of information via word of mouth as they share what they learn with trusted friends and family.

WHO IN NORTH KOREA USES MOBILE PHONES AND HOW

Approximately half (53 percent) of those who used a mobile phone in North Korea personally owned one. The majority of mobile phone owners purchased their handset from a friend or acquaintance. Others either purchased their phone from a Chinese businessperson or received their handset from relatives abroad. Due to the geographic signal restrictions and the composition of the survey sample, most mobile phone owners in this study came from northern provinces bordering China.

Figure 24: How did you get your mobile phone in North Korea?

(Percentage of mobile phone owners)

Purchased with permit	5%
Purchased from an acquaintance	84%
Received from family/friends abroad	11%

BBG Survey of North Korean refugees/travelers (2010 n=250)
carried out by InterMedia
Base: 18 mobile phone owners

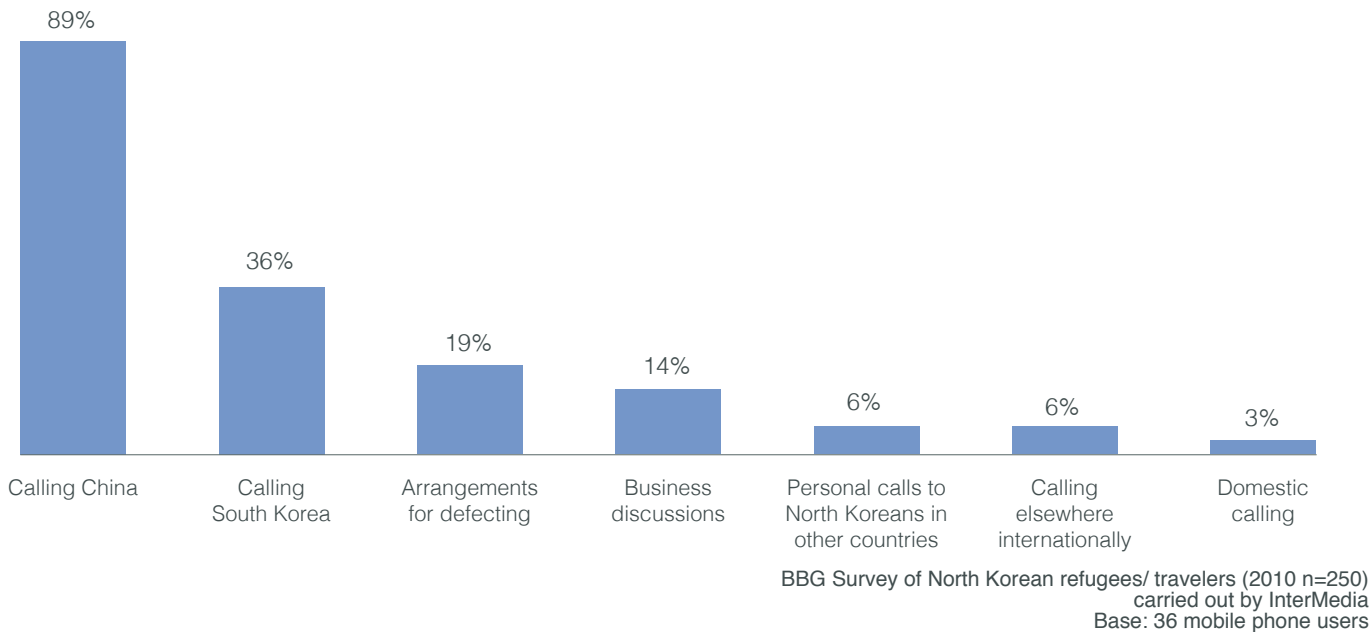
Qualitative interviews reveal that most respondents who used illegal Chinese mobile phones almost always made calls out rather than receiving calls in. Due to the danger associated with using an illegal mobile phone most respondents turned off their phones and removed the battery when not making calls in order to decrease the chances of detection. As all but one of the respondents who used a mobile phone in this study did so illicitly, their mobile phone use behavior was very different from that commonly observed in more open media environments. Calls were made very cautiously and only when there was important information to relay. Most calls made on illegal mobile phones were very short in duration.

When speaking with my younger brother over the mobile phone, I used to set a certain period of time in advance and turned on the mobile phone only during that period. Sometimes we used to make up secret codes, and limited each phone call to five minutes.

– 47, Male, Pyongyang and Hyesan, Left NK February 2009

North Koreans used their illegal mobile phones for a variety of purposes but as the chart below indicates most of the calls made, regardless of the purpose, were made to people in China.

Figure 25
How did you use your mobile phone?
(Percentage of total respondents who used their mobile phones for these reasons)



Mobile phones are the only way of communicating directly with people outside the country for business or personal reasons. As a result, micro-economies often develop around mobile phones in North Korea, as owners can charge people without phones a fee for calling abroad. About half of those in the 2010 survey who used a mobile phone inside North Korea did not own a mobile phone but instead used someone else’s phone for a fee. Almost all the survey respondents who paid a fee to make a mobile phone call used a phone owned by a friend or neighbor. Phone owners and paying users must have some level of trust in the other party to engage in such a potentially risky behavior.

Figure 26: How did you make mobile phones calls in North Korea?
(Percentage of respondents who are mobile phone users)

Owned mobile phone personally	53%
Used other’s phone for a fee	47%
Used other’s phone for free	0%

BBG Survey of North Korean refugees/travelers (2010 n=250) carried out by InterMedia
Base: 36 mobile phone users

All but one mobile phone owner allowed others to make calls on their mobile phone for a fee. Most also let friends and family members make calls on their mobile phones for free.

There wasn't a fixed fee for using a mobile phone. I usually paid something from 30,000 to 50,000 won.

*– 43, Male, Hwanghaebukdo Sariwon, Left NK
November 2009*

While qualitative evidence suggests some North Koreans are beginning to use some of the advanced features of their illegal phones, in the 2010 survey no respondents reported using any features aside from calling. None surveyed reported sending or receiving SMS (text messages) or taking pictures or video on their phones.

STAYING IN CONTACT WITH PEOPLE IN NORTH KOREA

Many refugees and defectors continue to communicate with people inside North Korea. Thirty-one percent of survey respondents reported contacting friends and relatives in North Korea even after leaving the country. The large majority (81 percent) of those stayed in contact with their friends and families via mobile phone. While there are still many challenges, the proliferation of Chinese mobile phones in the border region has made staying in contact with people in North Korea an increasingly common phenomenon among those who have left the country. The exchange of information between North Koreans in China and South Korea and their families and friends in North Korea has an important impact. It affects what those inside the country know about the outside world and what those outside know about the situation in North Korea.

By and large the most popular topic of discussion in refugees' communications with people in North Korea was personal information. However, in the course of these personal communications, most also reported having some discussion of the situation in North Korea. Information sharing within North Korean refugee networks in China, and within the defector community in South Korea, suggests that these personal communications are generally sufficient to keep many North Koreans outside the country informed of internal developments in North Korea.

COMPUTERS, USB DRIVES AND MP3 PLAYERS

Computers, USB flash drives and MP3 players have impacted the way media is accessed and shared among those who have the means to acquire such advanced media devices.

Sixteen percent of those surveyed reported having access to a computer in North Korea. Many schools, offices and military units in North Korea now have a computer that is shared between members. Many elites have PCs or laptops in their home for private use. Qualitative interviews suggest that computers are often used to view outside media such as South Korean dramas and foreign movies. Computers are also valued as interfaces for USB drives and MP3 players. However, it is important to remember that virtually no computers in North Korea are connected to the internet (with the exception of a small number of computers in highly secure or highly monitored areas) and home computers are not even connected to the domestic North Korean intranet.

Figure 27: Did you ever use
your mobile phone to...

(Percentage of mobile phone owners)

Let friends or family make calls for free?	79%
Let others make calls for a fee?	95%

BBG Survey of North Korean refugees/travelers
(2010 n=250) carried out by InterMedia
Base: 19 mobile phone owners

The MP4 was empty but I received movies and music from friends who had computers and then I watched and listened to them. The battery was charged with electricity and it was portable so young people liked it.

– 23, Male, Pyongyang, Left NK February 2011

While MP3 players have legal uses such as language learning, most respondents who had used an MP3 player said they used the device to listen to foreign songs, primarily South Korean K-Pop, which has been gaining popularity among North Korean youth since it made its way into the country, often in MP3 form. Some respondents reported purchasing MP3 players preloaded with South Korean songs, presumably by merchants in China or elsewhere in North Korea. Eight percent of the survey sample reported having access to an MP3 player in North Korea.

My child wanted an MP3 so I think I got one in Sinui-ju for around 35,000-55,000 won. My kids would take them to school and fill the empty MP3 with South Korean songs; they would also get math, physics, English, and other kinds of lectures on their MP3 from upper classmen at the school.

– 47, Female, Pyongyang, Left NK January 2010

About 70-80 percent of people that have MP3/4 players are young people. When you do a crackdown of MP3/4 players among high school and university students, you see that 100 percent of them have South Korean music.

– 44, Male, Hamgyeongbukdo Chongjin, Left NK November 2010

The 2010 study does not contain figures on USB access rates but subsequent surveys have put access to USB drives slightly under or on par with access to MP3 players. As there is no way to send a file from a work or school computer to a home computer, USB drives are legitimately used to transfer data from one computer to another. However, interviewees made it clear that they are also often used among trusted friends to share more sensitive materials such as South Korean dramas and music. Some elite respondents reported that, among some young elites, sharing foreign media in file form via USB flash drive has nearly replaced CDs and DVDs.

Advanced media devices are a particularly interesting addition to the media landscape in North Korea because the devices themselves are legal. Unlike a free-tuning radio or a modified TV, it is not illegal to own a computer, MP3 player or USB drive. These all have legitimate uses in North Korea and many North Koreans use them in legal ways. However, these devices do not have dials that can be easily soldered to prevent them from being used in an illegal way, so legal devices can very easily and discreetly be used to access foreign media content.

Since there is essentially no internet access in the DPRK, North Koreans are unable to utilize the full sharing potential of these advanced devices. Despite this limitation, the ability to transfer media between devices in file form, and the small size and concealability of MP3 players and USB drives, makes it possible for those who have access to these devices to share foreign media with people they trust more easily and safely than ever before.

AFTERWORD

Behind North Korea's seemingly static facade of huge military parades through Pyongyang and a young new leader groomed to look strikingly like his grandfather, this report has shown that conditions on the ground are more dynamic than many outsiders assume. The dance between the state's attempts to maintain allegiance and control on the one hand, and North Korean citizens' attempts to survive and prosper on the other, has grown more complex since the late 1990s, and unleashed transformative new forces internally. While significant bottom-up pressure on the regime is unlikely in the short term, many people in North Korea are beginning to look more critically at the basic premises of their country's power structure and policies.

The ability to track, understand and predict changes underway among North Korea's citizens will be critical for U.S., South Korean and other stakeholders striving to formulate and implement effective North Korea policies and plan for future scenarios. Fortunately, such decisions do not have to be made entirely in the dark. New developments in North Korea and abroad have enabled researchers to track social changes better than ever. A combination of resources - notably, testimony from thousands of new demographically diverse North Korean refugees and defectors, new tools such as Google Earth, and intelligence collected inside the country - are allowing researchers to paint a clearer picture of North Korea at all levels of society. Still greater opportunities exist to leverage these information resources into evidence-based and effective responses to the North Korean policy challenge.

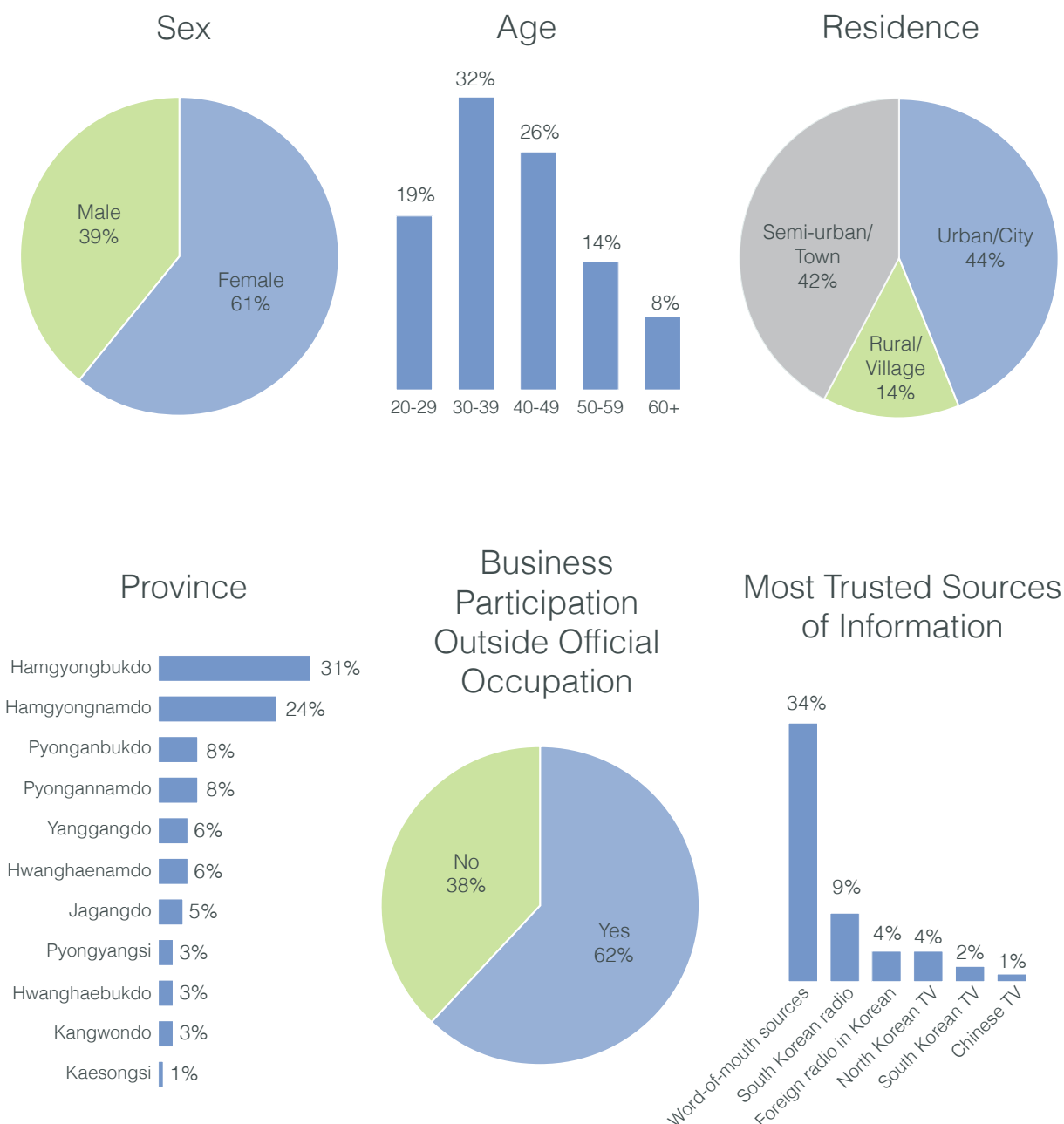
APPENDIX 1

SAMPLE CHARACTERISTICS AND MEDIA ACCESS AND USE BY DEMOGRAPHICS

Understanding the characteristics of people who access and use different media platforms is vital to assessing potential audiences for content delivered via these platforms. Appendix 1 presents the demographic characteristics of the sample used in this assessment, which included 250 North Korean refugees and travelers. The charts represent the demographic breakdowns for access to and use of key media platforms in North Korea.

(Note: Due to rounding, percentages may not add up to 100 percent.)

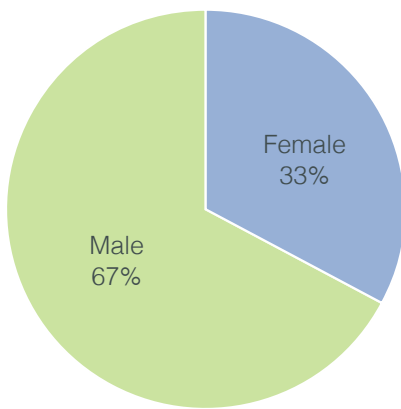
Sample



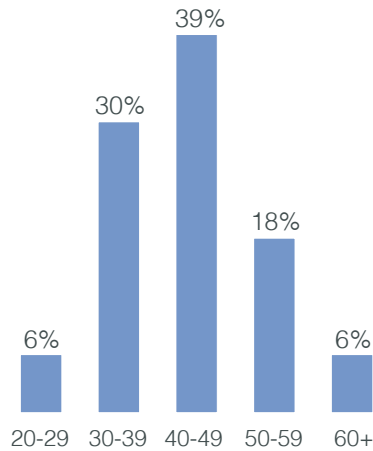
Radio (Shortwave Capable)

Access to Media Platforms by Demographics

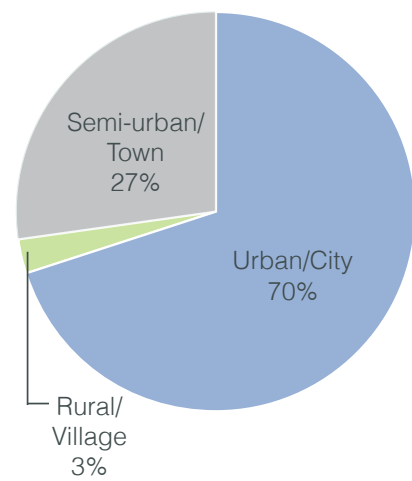
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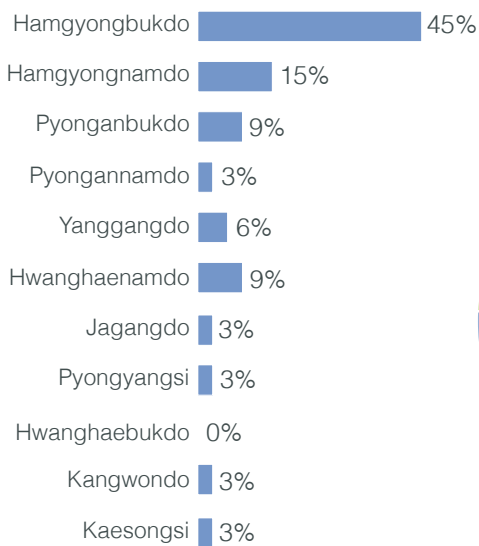
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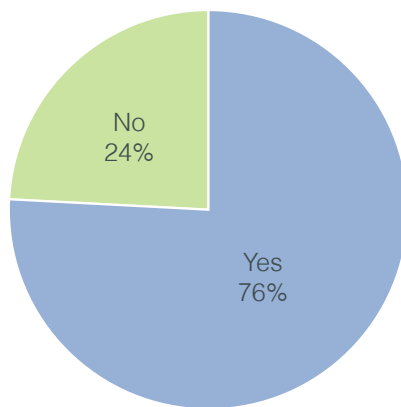
Residence



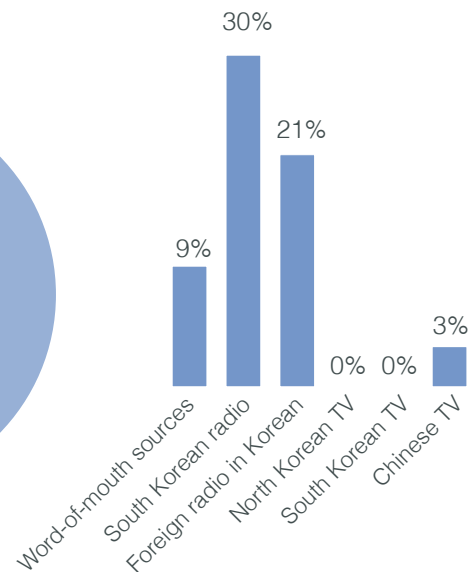
Province



Business Participation Outside Official Occupation



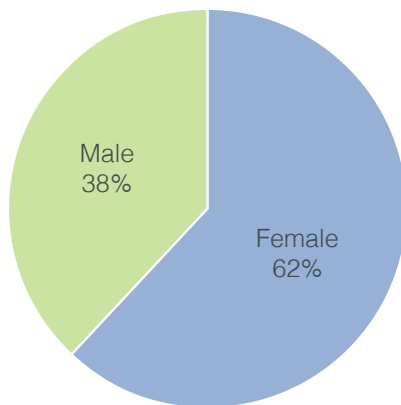
Most Trusted Sources of Information



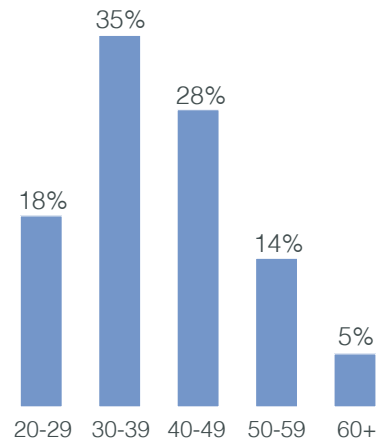
Television

Access to Media Platforms by Demographics

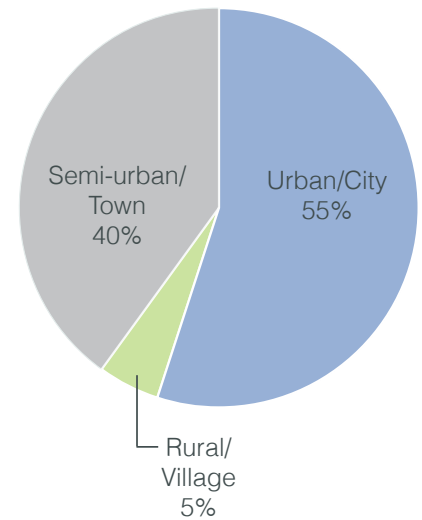
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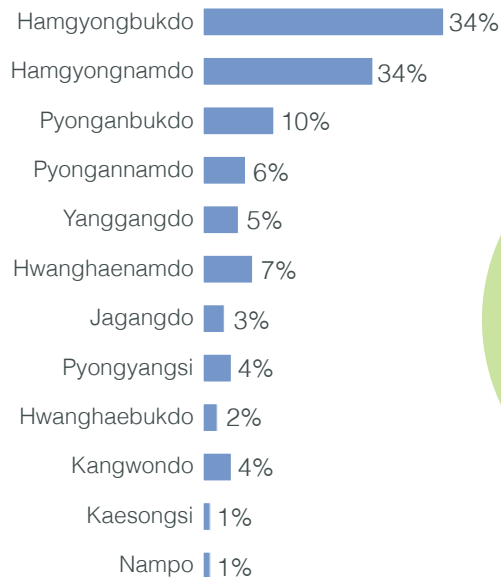
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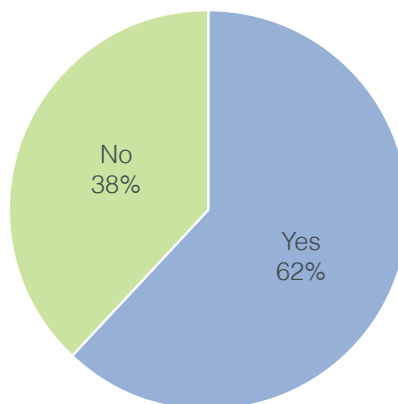
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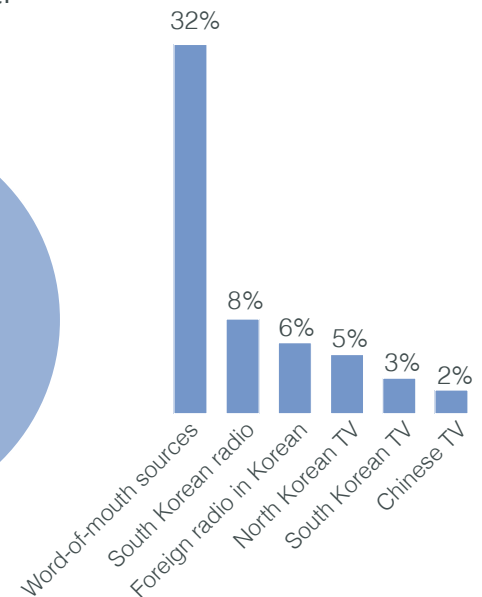
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Business Participation Outside Official Occupation

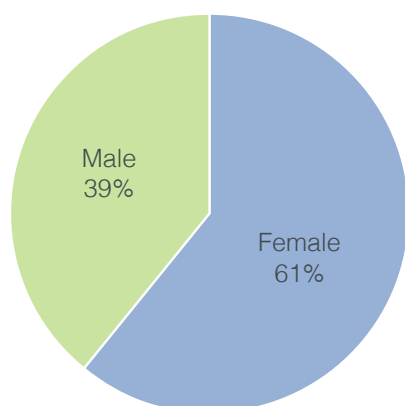


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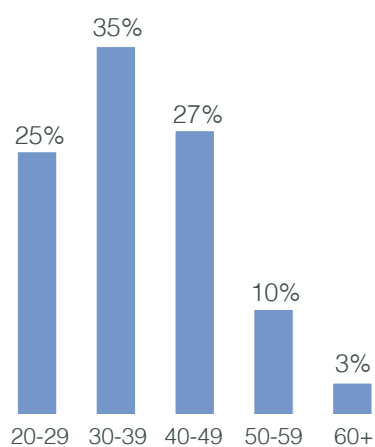


Access to Media Platforms by Demographics

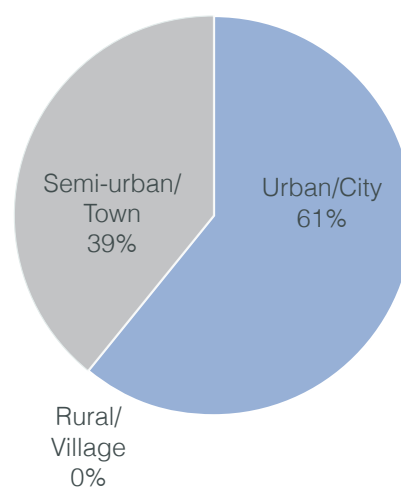
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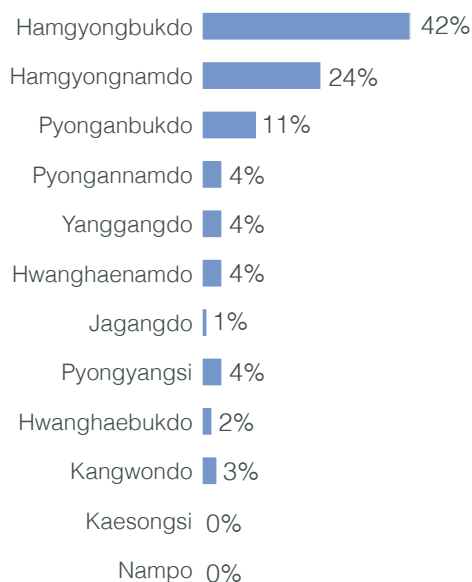
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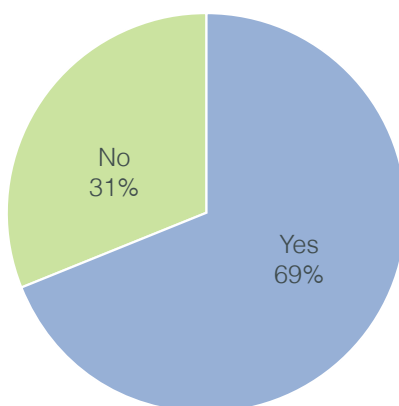
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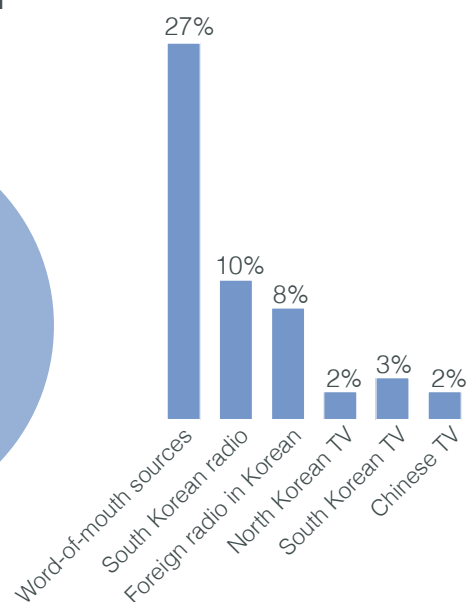
Province



Business Participation Outside Official Occupation



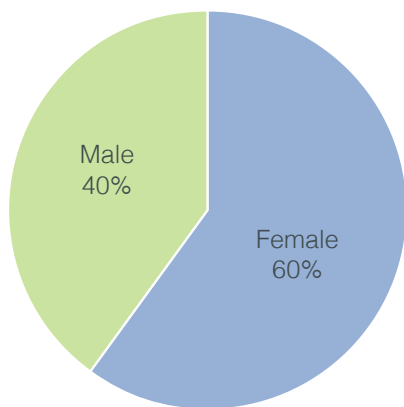
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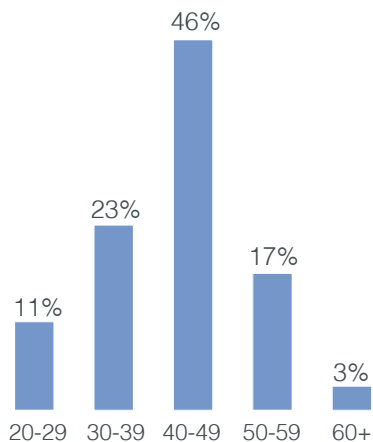
Mobile Phone

Access to Media Platforms by Demographics

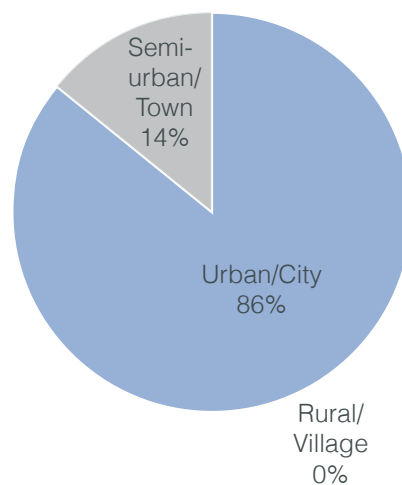
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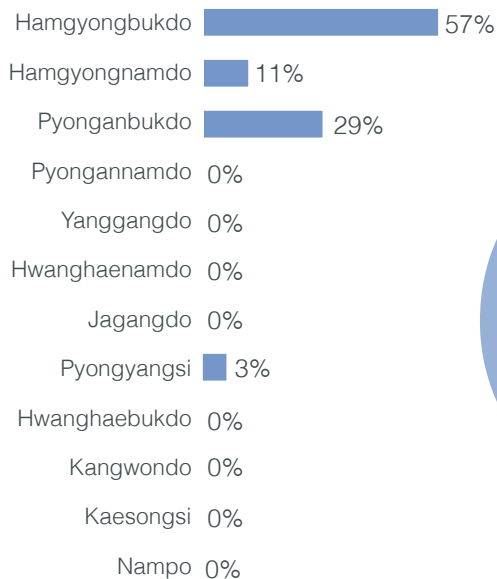
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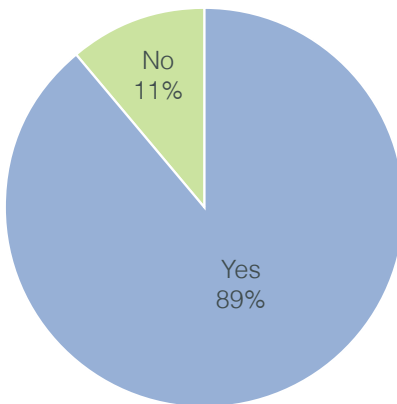
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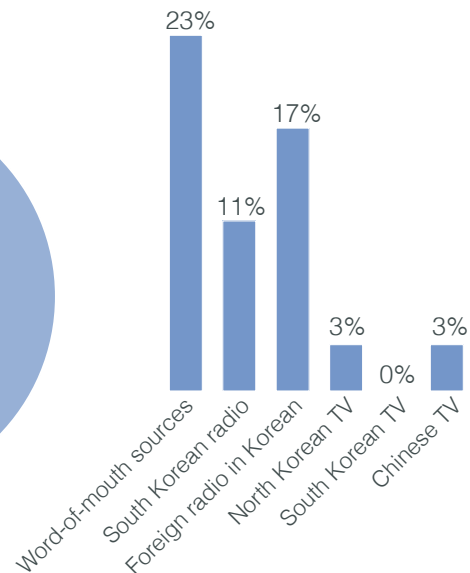
Province



Business Participation Outside Official Occupation



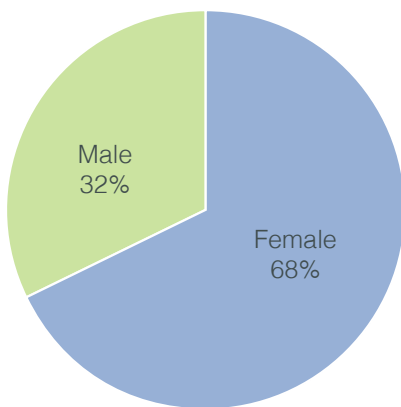
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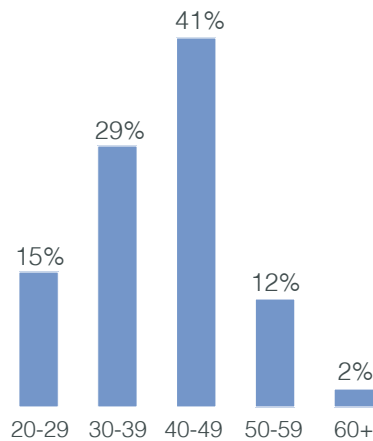
Personal Computer

Access to Media Platforms by Demographics

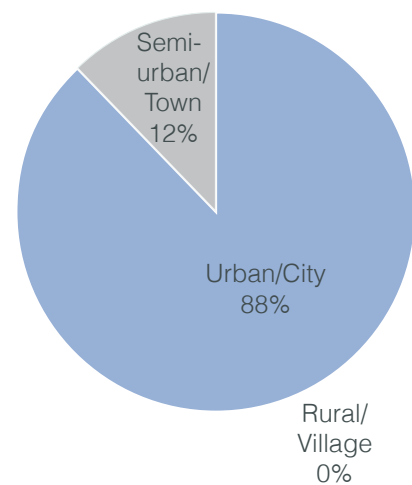
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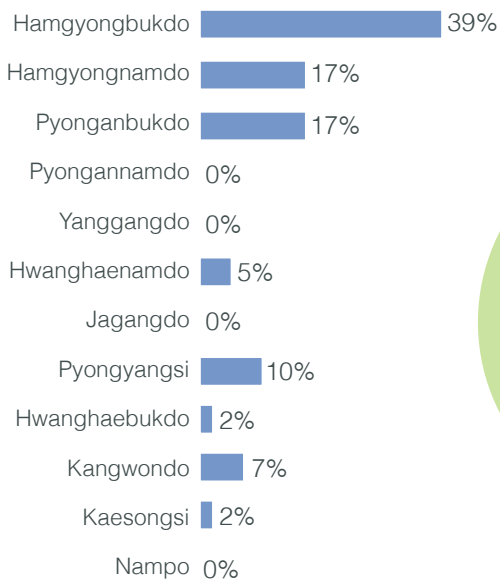
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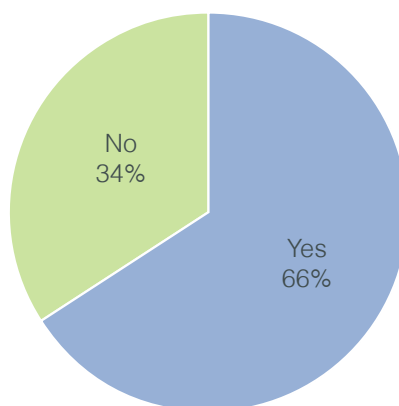
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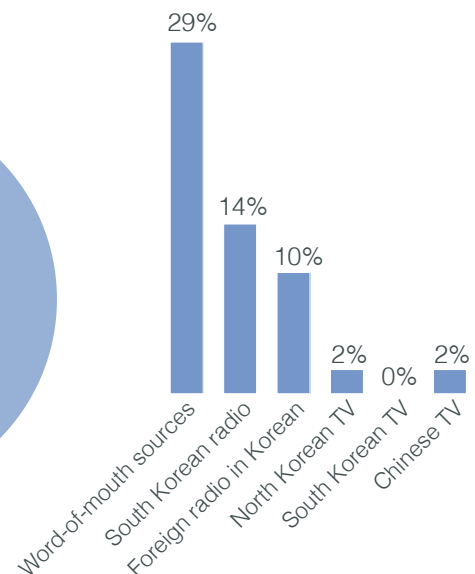
Province



Business Participation Outside Official Occupation



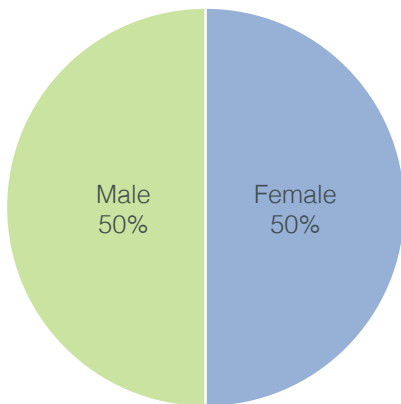
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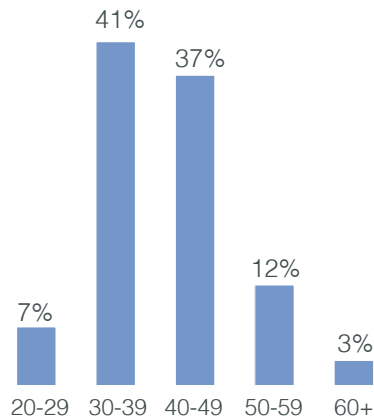
Foreign Radio Listeners

Access to Media Platforms by Demographics

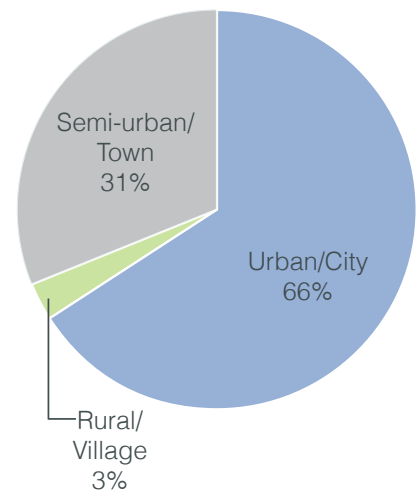
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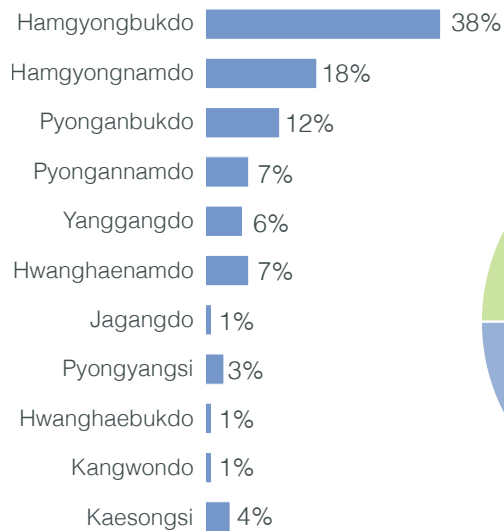
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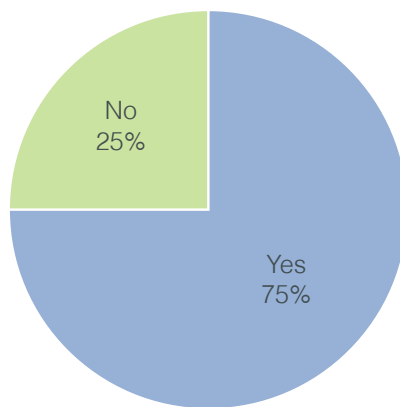
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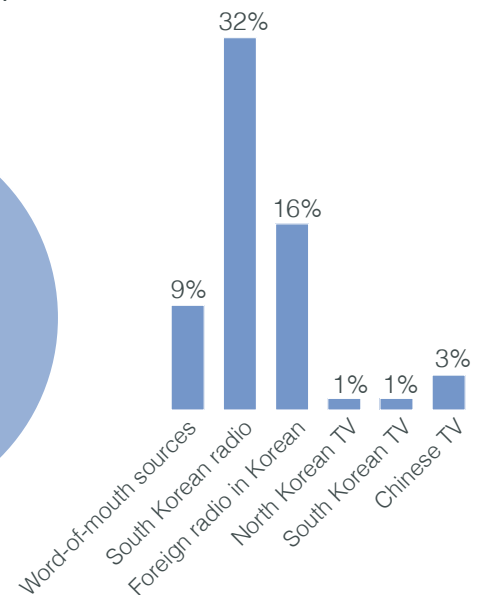
Province



Business Participation Outside Official Occupation



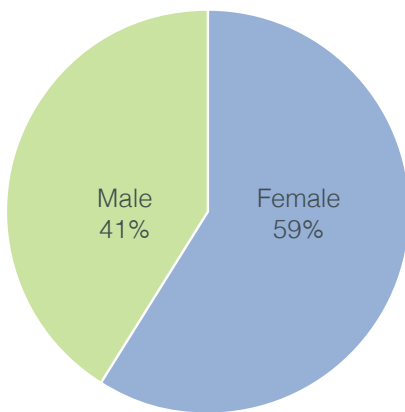
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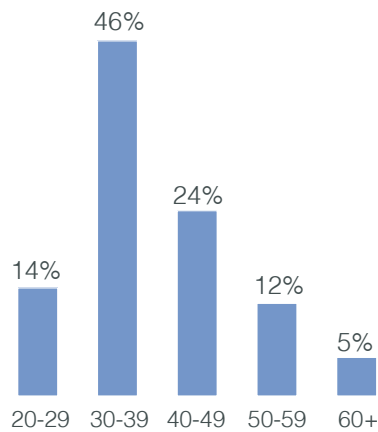
Foreign TV Viewers

Access to Media Platforms by Demographics

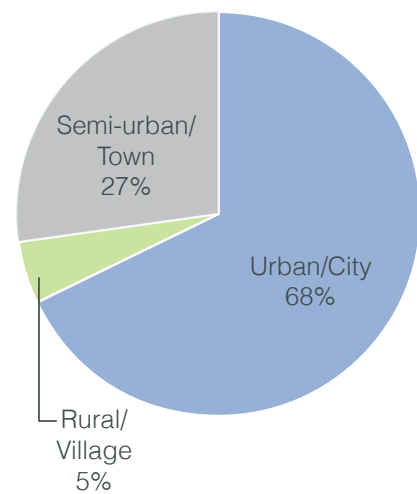
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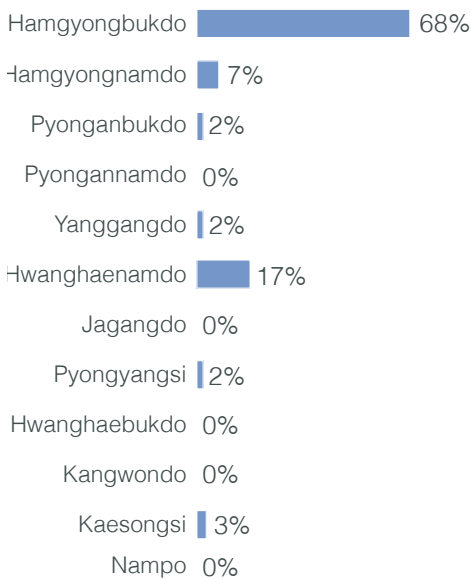
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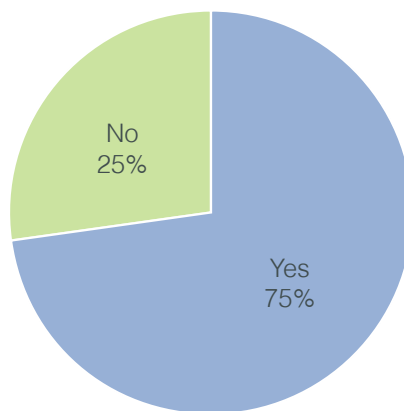
Residence



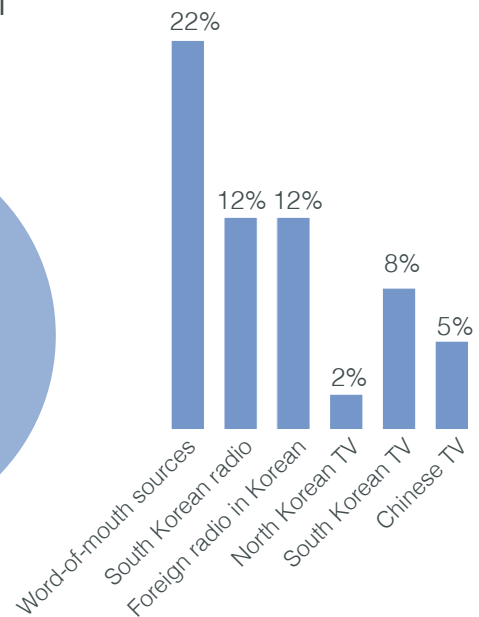
Province



Business Participation Outside Official Occupation



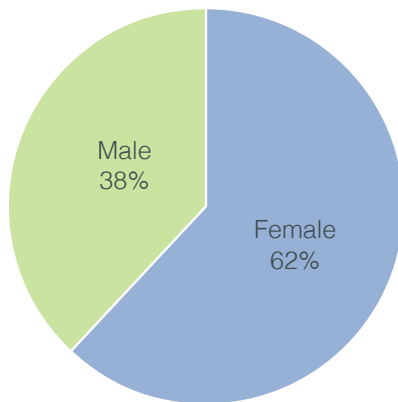
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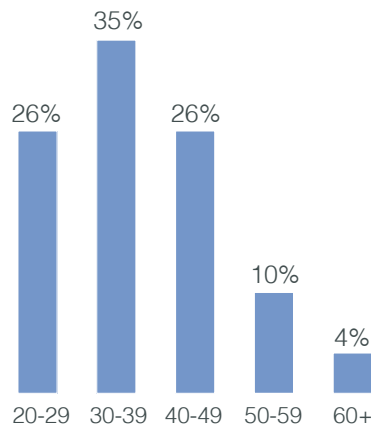
Foreign DVD Viewers

Access to Media Platforms by Demographics

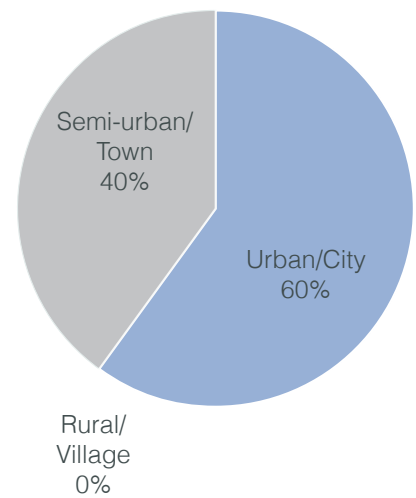
Sex



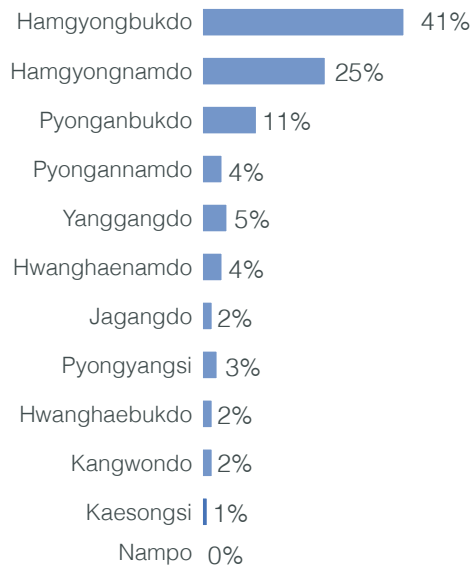
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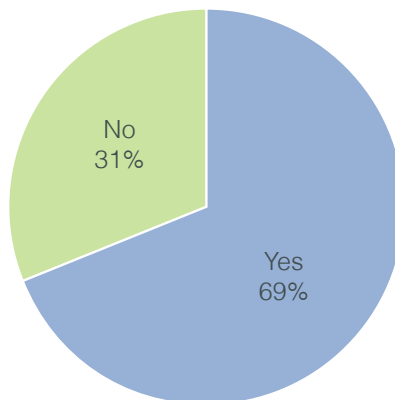
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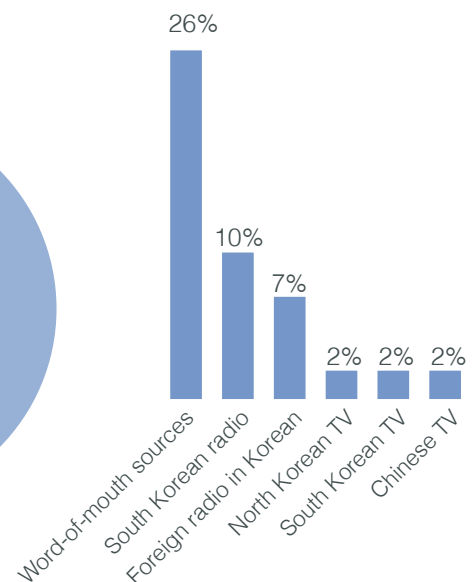
Province



Business Participation Outside Official Occupation



Most Trusted Sources of Information



APPENDIX 2

NORTH KOREA'S LEGAL CONTEXT AND SOCIAL CONTROL

North Korea remains an extremely repressive and tightly controlled society. Social control in North Korea occurs at three levels: ideological, physical and institutional.^{20,21} The Korean Workers' Party (KWP) attempts to control citizens through the state ideological system known as Juche. Physical and material control occurs through the socialist economy and the public distribution system. Institutional control occurs through the law and through membership in socialist organizations and associations, which ultimately structure one's life.

Even after the collapse of the communist bloc, these measures functioned relatively well until the death of Kim Il-sung in 1994 and the collapse of the economy in the late 1990s. These two major events so greatly traumatized North Korean society that it resulted in the weakening of ideological refinement and a collapse of the control of material goods.²² All three forms of social control were weakened as a result of these important events.

During this period, ideological control was increased especially among the youth, with an emphasis on a military mindset. Simultaneously, the control of material goods, and private interests and profits was eased.²³ The initial reasoning for this policy combination seems to have been that strong ideological control would compensate for the weakening of the other controls and thus sustain the entire effect.²⁴ Driven by a need to correct this miscalculation, Kim Jong-il intensified all levels of ideological, lifestyle, and physical controls.²⁵ Part of this change was codified and justified by North Korea's criminal law system.

THE LAW

The goal of North Korea's criminal law is to "protect the socialist system from all anti-revolutionary forces, and to arm all people with the class struggle and Juche ideology."²⁶ The general term "anti-revolutionary forces" includes foreign media access as well as possession of illegal, unregistered media devices: the North Korean penal code specifically includes articles on media-related crimes. The Korea Institute for National Unification (KINU) provides information on media usage and outside information included in the April 2004 amendment of the North Korean penal code. The law specifies the importation and circulation of corruptive contents, usage of unregistered media devices, access to South Korean broadcasts and media, and spreading false information that disturbs social order. The punishment for such criminal activities can range from up to three months of unpaid labor or labor education to more than two years in a labor training camp. Additionally, the 2004 penal code added new crime categories to address importation of "corruptive culture" and engagement in "corruptive behavior." Table 1 reflects the related crimes included in the 2004 penal code.

Table 1: North Korean Penal Code

Source: KINU White Paper on Human Rights in North Korea 2011.

ARTICLE	CRIME	PUNISHMENT
113	Bringing in or circulating pornographic or corruptive audio/video tapes, copying and circulating tapes, and using illegal, unregistered devices	Up to 3 months of unpaid labor or labor education; in more serious cases, unpaid labor for over 3 months, demotion, lay-offs, or job termination
Other	Illegal import of music, dance, paintings, photos, video tapes or CDs containing pornographic, corruptive, or depraved contents, manufacture/circulation of materials, watching/listening/participating in such activities	Labor training camps, correctional centers, "education center"
193	Importing corruptive culture	
194	Engaging in corruptive behavior	
195	Listening to South Korean broadcasts, collecting, possessing and circulating South Korean printed matter, spreading unfounded rumors	According to <i>NK Vision</i> , the official punishment for watching South Korean media is anywhere from 2 years in a labor re-education camp to 5 years in a prison camp, but in reality, it varies depending on bribes and social status. ²⁷
	Systematic listening to anti-republic broadcasts; collecting, possessing or circulating leaflets/photos/video tapes/printed material	Up to 2 years of labor training, more serious cases up to 2 years of correctional labor
222	Spreading false stories or rumors that create distrust against the state or contribute to social disorder	2 years of labor training
Other	Reading, possessing or selling foreign books	Reading South Korean books results in charges of espionage and severe punishment.

In 2007, the penal code was amended again. The addenda are significant in that they provide legal justification for intensified punishments and their application to a wider range of crimes including general crimes. Jung-won Park's 2010 examination of the 2007 criminal law finds that these addenda reflect the regime's intention to increase control and pressure on people who have strayed from the socialist economic and political order by implementing harsh punishments. In this regard, the addenda have specifically strengthened and added new regulations, and further segmented the components required to be determined a crime (crimes other than anti-state crimes are now punishable by death). The changes also show an effort to tailor laws to new social problems and problems that have more recently become severe. Examples of this include the serious crime of illegal cooperation with someone living abroad resulting in more than three years, but less than five years, in a labor training camp. The serious crime of overlooking crimes results in up to three years in a labor training camp.²⁸

This newly legalized authority is concerning because it gives the regime more muscle to maintain stability by increasing the state's penal authority. It provides the potential for arbitrary application of crime and punishment to the benefit of the regime and the individual exercising the authority. The fact that specified standards are not provided to guide differentiation between an "especially serious circumstance/case" (특히 무거운 형태) and an "extremely serious case" (극히 무거운 형태) can result in an arbitrary ruling and an undeserving punishment for the criminal. Although the study does not provide detailed information on changes to media usage and information crimes, the main characteristics of the 2007 addenda are applicable to those crimes as well. Ultimately, increased control over the people, validated through these addenda, appear to be designed to be used as a tool for regime stability and stable succession.²⁹

REGISTRATION OF MEDIA DEVICES

The government keeps abreast of its people's outside media access potential by requiring registration of many forms of media platform with the appropriate authorities. Radios, televisions, and tape recorders must be registered with the authorities.³⁰ TVs must be properly registered with the relevant security office for the region/district, where the channel will be fixed on Korean Central Television, though many have learned to bypass this with remote controls.³¹ Defectors have reported that TVs will be confiscated if a person cannot produce the TV registration certificate upon inspection.³²

Computers must also be registered with authorities, even if they are for official organizational use. One recent defector describes the steps involved in registering a computer. First you receive an "anti-signal" inspection from the National (State) Security Office 16 – the "Signal Monitoring Office." Then you register the computer at the relevant city or provincial branch office of the People's Security Agency. Then the hard disk must be inspected for anti-socialist materials by the Publication Censorship Office of the Publication Administration.

When telephone lines are installed in individual homes (an incredibly expensive ordeal), lines are wiretapped and monitored by security agents who are housed in a room in each district's telephone branch bureau.³³ Mobile phones must be subscribed at Koryolink offices, which are officially partly owned by the government agency Korea Post and Telecommunications Corporation (KPTC).

PUNISHMENT

Criminal activities, as stipulated by the law are managed through primary, secondary and tertiary control measures, in order of least to most serious repercussions. Haeng-sun Sohn's research found that primary control measures are efforts to enforce control generally, through teachings, ethics and crackdowns. Secondary control measures are administrative punishments enforced through one's affiliated organization or company. These punishments are wide-ranging, from re-education to public execution. Tertiary control measures are those that address crimes as set by the Penal Code, generally in the form of punishments.³⁴ All organizations exert the absolute influence and power of the party by controlling and ordering its human resources and putting the legal rationale behind the organizational rationale of the party.³⁵

While the security groups enforcing government policies are not clearly laid out, KINU's report indicates that, individual agencies as well as different combinations of the National Security Agency, the People's Safety Agency, the Prosecutor's Office and the party are involved in the process. For example, CD/DVD related crimes were previously enforced by a "grouppa," or a consortium of the National Security Agency, the People's Safety Agency, the Prosecutor's Office, and the party, before separate "109 Units" were organized in response to growing circulation and given responsibility for enforcement. "109 Units" have been reported on widely by various North Korea-watching media outlets, and KINU states that the units are stationed in strategic locations to conduct inspections to stop the illegal circulation and viewing of DVDs and CDs.³⁶ Radios are checked by an MPS official who visits each home every three months to verify the dial is still fixed.³⁷

While the punishments generally take the form of labor or re-education, defectors' testimonies have indicated both harsher punishments and opportunities to avoid punishment. Some reports are of extremely severe punishments, such as execution for using an illegal Chinese mobile phone. The timing for such extreme punishments might be linked to larger security and control issues. But it appears that, more often than not, punishment for crimes such as using illegal mobile phones, possessing unauthorized media devices, or watching corruptive material such as South Korean dramas can be avoided by paying bribes to security officials.

The lucrative nature of the bribery system has made corruption commonplace in North Korea. KINU reports that bribes for illegal mobile phones generally ranged from about 500,000 KPW to 1 million KPW, and in rare cases up to 1.5 million KPW (pre-re-domination). The June regional brief from Rimjingang reported that calling South Korea or China in Musan County of North Hamkyung Province resulted in, respectively, a 1 million KWP/400,000-600,000 KWP fine and five to seven days in custody.³⁸ According to defector testimonies, the severity of punishments for illegal mobile phone use may depend on the content of the conversation, which country was called (ROK vs. PRC), length of time the mobile phone was owned, and whether or not the person was a first time offender.³⁹

Increasingly, reports claim that security is tightening and crackdowns are intensifying, but these reports come mainly from sources inside North Korea, which are difficult to verify and often of varying credibility. It is clear, however, that the regime is concerned about the proliferation of illegal Chinese mobile phones and hopes to control it. This is being done through the formation, strengthening and restructuring of security groups and the utilization of new technologies.

APPENDIX 3

THE INTERNET IN NORTH KOREA

North Korea has recently become noticeably more active on the Internet. The number of websites officially managed by the North Korean government has increased rapidly, and a server in Pyongyang has begun to host some websites on “.kp” addresses. These and other signs seem to indicate that North Korea has made a conscious decision to create a stronger presence online.

The risk-averse North Korean government, however, would have made the decision to be connected to the World Wide Web, if and only if, the information available to its public could be limited to pre-approved information. If this condition can be maintained, cyberspace could be a sphere of much needed economic benefits with minimal social and political costs to the North Korea government.⁴⁰

Research suggests that this is indeed what the regime has done. It currently has control mechanisms in place to safeguard the regime from “potentially destabilizing ... impacts of the Internet.”⁴¹ Former professor of computer science in North Korea, Kim Heung-kwang, states that this mechanism has been designed to form a “Mosquito Net.” The system aims to “attract the inflow of foreign investment while simultaneously blocking the infiltrations of foreign ideas, news, and culture.” Kim asserts that the North’s three leading IT institutions, Central Information Agency for Science and Technology (CIAST), Korea Computer Center (KCC), and the 6.26 Technology Center, were given the task of exploring potential security measures. They ultimately offered differing strategies, including One-Point Connection, Single Gateway, and control through hardware and software.

In addition, it is likely that control is managed through a combination of computer software and manual filtering of information by the most loyal in Pyongyang. Choson Exchange, an organization that works on the ground in North Korea, previously confirmed use of such manual techniques.

With these measures in place, the North Korean government cautiously ventured into this new field, first experimenting with computer networking systems in the early 1990s. The first domestic internetwork connected approximately 100 government institutions such as North Korea’s Academy of Sciences, the Korean Workers’ Party, and Kim Il Sung University⁴² through telephone lines. Local area networks were eventually upgraded from telephone lines to fiber optic cables in the late 90s, thanks to a UNDP-sponsored fiber optic cable factory.⁴³

Efforts to develop a nationwide LAN network started in the mid 1990s, but the network wasn’t completed until October 2000.⁴⁴ This sparse network connected cities outside the capital to Pyongyang for increased information sharing.^{45,46} The network was expanded down to the city and district level in 2003,⁴⁷ and this wide area network, or WAN, significantly improved knowledge sharing capabilities throughout the country. A basic nationwide network was completed with the infrastructural potential to connect to the World Wide Web.

The development of the nationwide intranet, called “Kwangmyong,” by CIAST in 2001, was instrumental in sharing information, connecting more than 1,000 institutions around the country. While in home intranet was only available in North Korea for a relatively short period of time, services for the public began in November 2002 and included email service, a messenger program, and a file transferring and document search engine^{48,49} of more than tens of millions of records.⁵⁰ Subscription for the service was free,⁵¹ and as of 2004, CIAST claimed that Kwangmyong had 10,000 subscribers.⁵² It is likely that the number of subscribers would have increased, but some limiting factors may include the telephone usage costs accrued when using Kwangmyong, and the poor state of North Korea’s telecommunications infrastructure. This latter factor has likely improved in more recent times because of Orascom’s installation of a fiber-optic network in the country⁵³ for its 3G mobile phone network.

Around 2000, a time generally seen as moving towards more opening and reform, North Korea advanced its efforts in networking by exploring internet connections. Telecommunications lines were constructed to connect major agencies and institutions in Pyongyang to Beijing for connection to the internet.⁵⁴ The Korea Post and Telecommunications Corp (KPTC) made efforts to further develop the North Korea's telecommunications infrastructure. Efforts to collaborate with U.S. and South Korean firms proved to be in vain. Nevertheless, North Korea registered with the Society of Worldwide Interbank Financial Telecommunication (SWIFT) in November 2001,⁵⁵ signaling its desires for increased economic activities online.

Many different organizations are involved in North Korea's online activities. Examples include government bodies such as the Ministry of Posts and Telecommunications; academic institutions such as Kim Il Sung and Kim Chaek Universities; enterprises like Unha Corporation and Korea Roksan Trading Company; as well as IT groups such as Pyongyang Information Center (PIC) and Korean Computer Center (KCC), which is the largest IT company in the DPRK.

The expanse of KCC's activities and the reach of its presence are surprising. Developed in 1990, KCC focuses on software development, training of IT professionals, website management, hardware related sales and import, policies on information technology, and resource management consulting.⁵⁶ KCC employs more than 1000 staff⁵⁷ at its headquarters in Pyongyang, maintains 11 regional branches in each province in North Korea, and overseas branches in Germany and China,^{58/59} as well as affiliate offices in Syria and Arab Emirates.⁶⁰ The Pyongyang headquarters is divided into 10 different software development centers (with separate quality control centers to ensure international standards),⁶¹ the KCC information Technology College and the Information Technology Institute.⁶² Each of its software development centers focuses on software for different sectors, and Table 1 shows information gleaned from old footprints of the North Korea's official Naenara website.⁶³

Table 1 : KCC's software development centers

Source: Kim, Jane. (2011)

CENTER	FOCUS
Osandok IT Center	Operating system
Pulgunbyol IT Center	N/A
Mangyong IT Center	Network and communication
Oun IT Center	Information security
Samilpo IT Center	Office automation and artificial intelligence games
Chongbong IT Center	Language information processing
Sobaeksu IT Center	Control system
Milyong IT Center	Medical diagnostic equipment; biosignal processing
Samjiyon IT Center	Multimedia; created award-winning game, "Paduk"
Naenara Information Service Center	Operates main portal website in DPRK, "Nae-nara"

In 1997, North Korea opened the news website of Korea Central News Agency, its first website. Other early websites include the Korea Info Bank in 1999, a website focused on securing investment and economic cooperation,⁶⁴ as well as Silibank in 2001. Silibank was operated by the Korea 6.26 Shenyang Company, also known as the 6.26 Technology Center,⁶⁵ and was significant as the first DPRK website to offer international email service. Email exchange was provided once a day to registered users until 2003,⁶⁶ when a direct line was installed between China and North Korea to allow 24-hour email services.⁶⁷

Since then, North Korea has begun to aggressively develop its presence online. It has increased the number of its websites, especially websites that can generate economic profit. North Korea's earlier websites reveal concerted efforts to utilize the internet for profit-seeking opportunities. As Table 2 shows, North Korea averaged about one website related to economic activity from 1999 to 2008.⁶⁸

TABLE 2: LIST OF NORTH KOREA'S PROFIT RELATED WEBSITES

Source: Lee, Hae-jung, 2008.

**Website states its founding as November 2000.

FOUNDED	WEBSITE NAME	MAIN CONTENT
1999 Oct.	Korea Info Bank [dprkorea.com]	Advertisement to attract economic co-operation and investment
2000 July	Pyongyang Times [times.dprkorea.com]	Advertisements of businesses in the economic sector
2001 Sept.	Silibank [silibank.com]	Website for business (e.g., mediating email)
2002 Jan.	Korea Tours [dprknla.com]	Information to attract tourists and businessmen
2002 Dec.	Korea Trade [dprkorea-trade.com]	Online shopping mall for foreigners
2003 Feb.	Cholima Group [cholima-group.com]	Targeted foreigners for trade
2003 July**	Korea Friendship Association [korea-dpr.com]	Aimed at selling North Korean products
2003 Nov.	Pyongyang International Information Center [pic.international.com]	Sells software produced by the Center
2004 May	Korea Pugang Corporation [pugang-corp.com]	Sells medicine and medical supplies from the Corporation
2004 June	Naenara [kcckp.net]	Multi-purposed website with info on IT, trade, product sales
2006 Feb.	Chollima [dprk-economy.com]	Designed to attract foreign investment; has online shopping mall
2007 June	Ryomyong [ryomyong.com]	PR: literature, art, history, DPRK trademarks, Mt. Paekdu
2008	Arirang [dprk-tour.com]	Info for mass games tours, DPRK culture and investment

North Korea has also become much more independent online by establishing a server in Pyongyang. Previously, North Korean websites were hosted on foreign servers located in China, Japan and Germany. For example, the original KCNA website was hosted in Japan, while Korea Info Bank and Silibank were hosted in China. A functional server in Pyongyang has resulted in direct hosting for at least 12 DPRK websites, moved from foreign servers to the domestic one in late 2010 and early 2011.⁶⁹ Websites hosted by the server in Pyongyang have “.kp” addresses bought from the Internet Corporation for Assigned Names and Numbers (ICANN) on September 2007.⁷⁰ Though the “.kp” domain name was originally registered under the Korea Computer Center, registration was transferred to the Star Joint Venture Company in May 2011.⁷¹ It is known that 1,024 IP addresses were reserved under the “.kp” domain,⁷² and suggests the introduction of new North Korean websites in the future.

Additionally, North Korean websites have become more sophisticated in their appearance and technology. Websites like Korea Central News Agency's website previously looked outdated and unprofessional, but its recent facelift, in late 2010, has produced a more modern website more appropriate for an international news website. The design and reorganization has made the website much more user friendly, and now video clips with sound can even be watched directly on the website through an imbedded media player.

These developments suggest that North Korea is beginning to develop a more sophisticated internet strategy⁷³ – specifically, one that reflects a clear understanding of the internet’s economic potential and the importance of strategic marketing.⁷⁴ Close examination of North Korea’s websites reveals something of a two-pronged approach of targeting consumers according to purchasing power.⁷⁵ Commercial websites show strong determination to attract investors and acquire foreign capital by promoting North Korea as an attractive investment opportunity while noncommercial websites appear to target individuals to market North Korean ideology and culture. Korea watchers should expect continued technological advancements in the future, but expect such steps to be undertaken in an “our style” fashion with a careful eye towards regime stability.

APPENDIX 4

OFFICIAL MOBILE PHONES IN NORTH KOREA

Mobile phone service in North Korea can be traced back to 1998 when Lancelot Holdings (Hong Kong) introduced limited service in Nampo and Pyongyang.⁷⁶ However, plans for nationwide mobile service did not start until November 2002 when Thai firm Loxley Pacific began offering GSM⁷⁷ mobile services in the Free Economic Zones Rajin-Sonbong and Mount Kumgang, and in Pyongyang in 2003.⁷⁸ Though no official sources have confirmed this claim, defectors state that mobile phones, which cost 170,000KPW, were permitted down to the level of vice chairman of the Provincial People's Committee.⁷⁹ This period also saw a sudden increase in the number of Chinese mobile phone users in the border regions as the Chinese began to build relay towers along the border.⁸⁰ These developments in mobile phone use came to a halt with the Ryongchon railway explosion in April 2004, rumored to be a mobile phone-detonated assassination attempt on Kim Jong-il. At that point, mobile phones were prohibited and registered mobiles were seized without compensation. Experts speculate that this was motivated in part because North Korean authorities had difficulty distinguishing official mobile phones from the illegal Chinese mobile phones that were becoming widespread along the border regions.

In 2007 Egyptian telecommunications company Orascom concluded an agreement with DPRK officials on mobile telecommunications in North Korea, creating the joint venture CHEO Technology JV Company⁸¹ between Orascom Telecommunications (75 percent) and Korea Post and Technology Corporation (25 percent). Orascom was granted a license in January 2008⁸² to operate a nationwide GSM mobile phone network for 25 years, with exclusive rights the first four years.⁸³ 3G mobile phone service, under the name of Koryolink, officially began commercial service in December 2008.⁸⁴ Despite expensive subscription and user fees, Orascom's reports have indicated mobile subscriptions increasing at an exponential rate: 69,261 users by the end of September 2009, and 301,199 by the end of September 2010.⁸⁵ Most recently, Orascom's webpage reported that "as of June 2011, Koryolink is serving over 666,000 subscribers."⁸⁶ While mobile penetration is reported to be relatively low,⁸⁷ distribution began in regions outside Pyongyang including Sinuiju, Yanggangdo, and Hambukdo beginning in the fall of 2010.^{88,89}

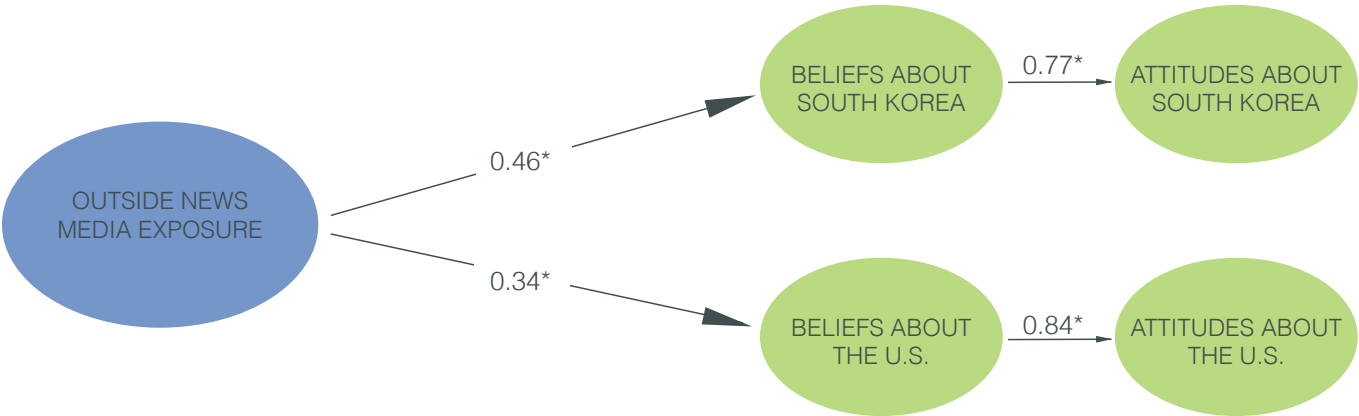
As Marcus Noland notes, the combination of the state itself, resident foreigners, North-South economic cooperation projects, and the nouveau riche present a considerable market for telecommunications services in North Korea. It will be unsurprising to see subscription numbers rise as Orascom attempts to increase profit by meeting the varying demands of its potential consumers. Targeted service provisions based on the needs of its consumers, while limited by North Korean government restrictions and still in their beginning stages, are evident. In addition to providing domestic mobile services for North Koreans, it became possible for foreigners to rent mobile phones capable of making international calls only, beginning in 2008.⁹⁰

The regime has recently signaled its approval of mobile phone use by allowing images of people using mobile phones to be included in official media, and has begun a series of education campaigns designed to teach mobile phone manners to new owners. While official mobile phones remain tightly monitored and are incapable of making international calls or connecting to the internet, they do provide an increasingly broader swath of North Koreans with the ability to communicate with one another instantly. The development of official mobile phones should be closely monitored as the North Koreans explore what is possible and allowable with their new devices.

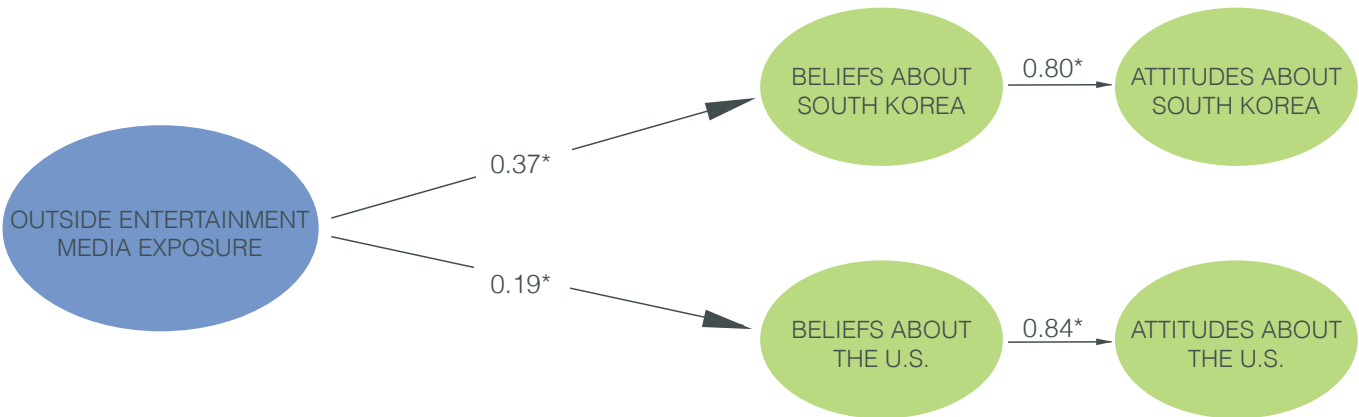
APPENDIX 5

ADDITIONAL FULL SEM MODELS

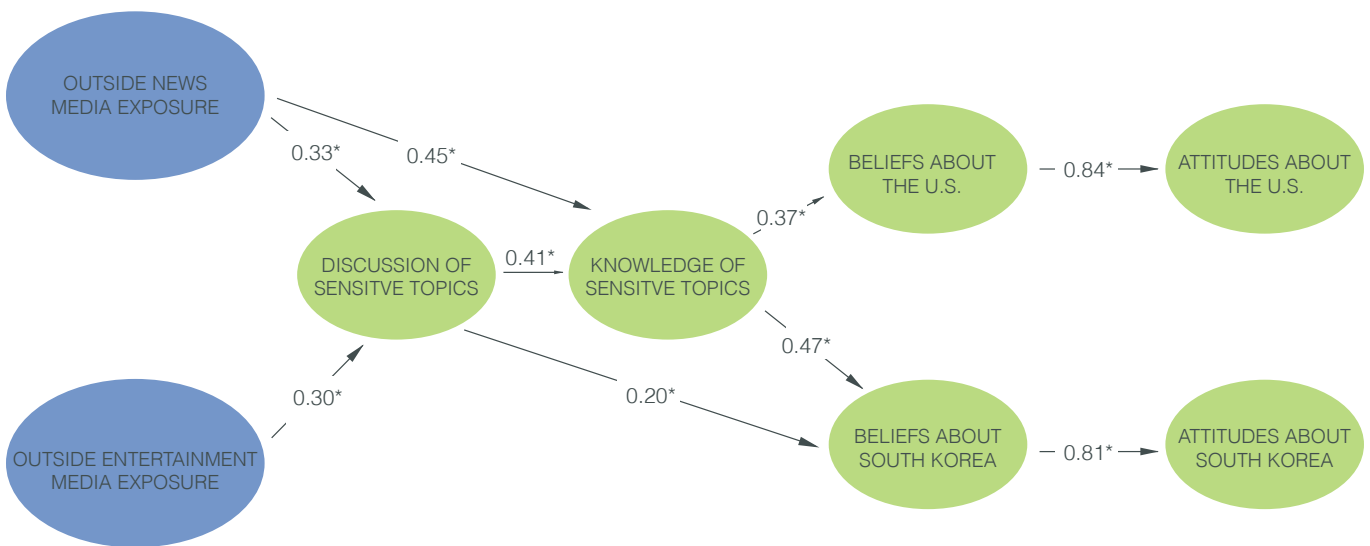
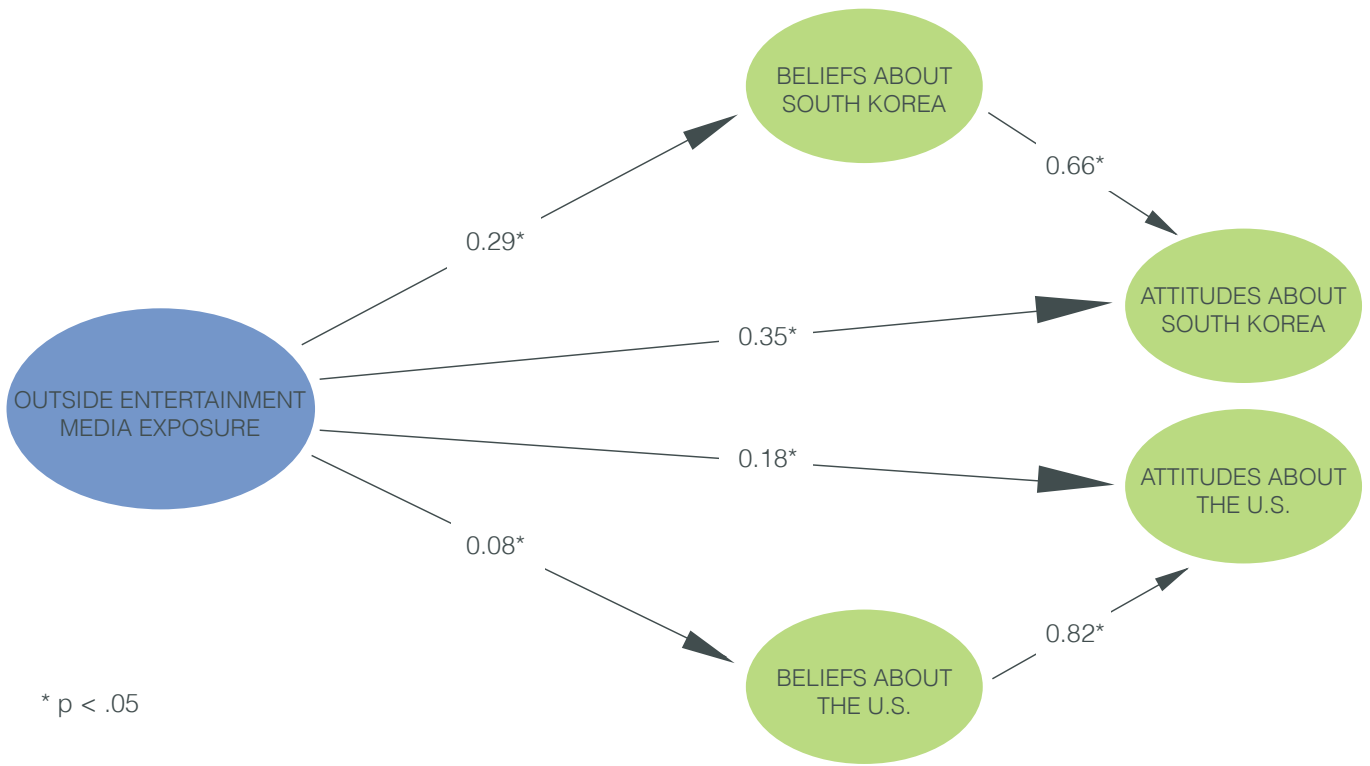
Section 2 of this report, Impact of Outside Media Exposure, outlines the findings from an investigation of the relationship between North Koreans’ beliefs and attitudes and outside media exposure that relies upon Structural Equation Modeling techniques. This appendix presents a series of additional models that were hypothesized and tested in the process of developing the full model (page 30). All path presented in the models in this appendix are statistically significant. The higher path coefficient, the stronger relationship between the connected constructs. Negative path coefficients indicate inverse relationships.

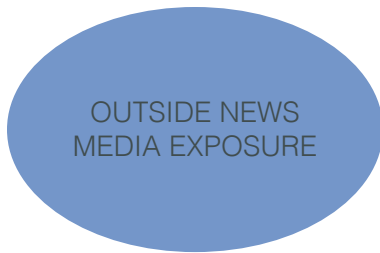


* p < .05



* p < .05





— 0.76* →



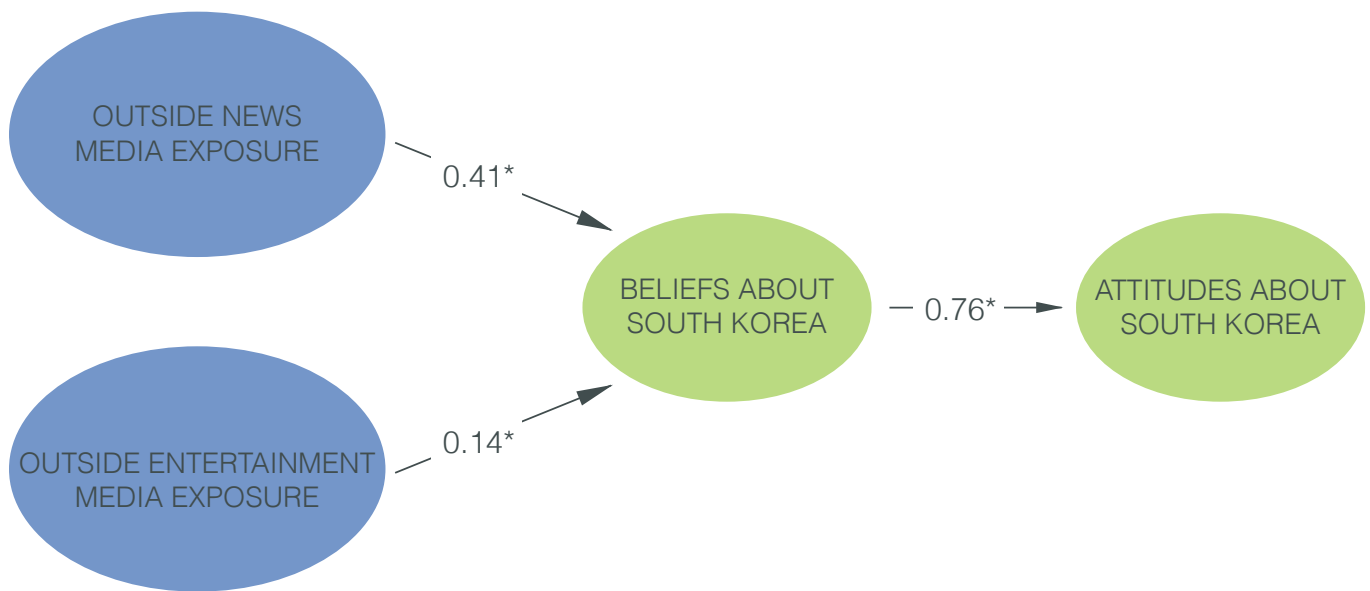
* $p < .05$



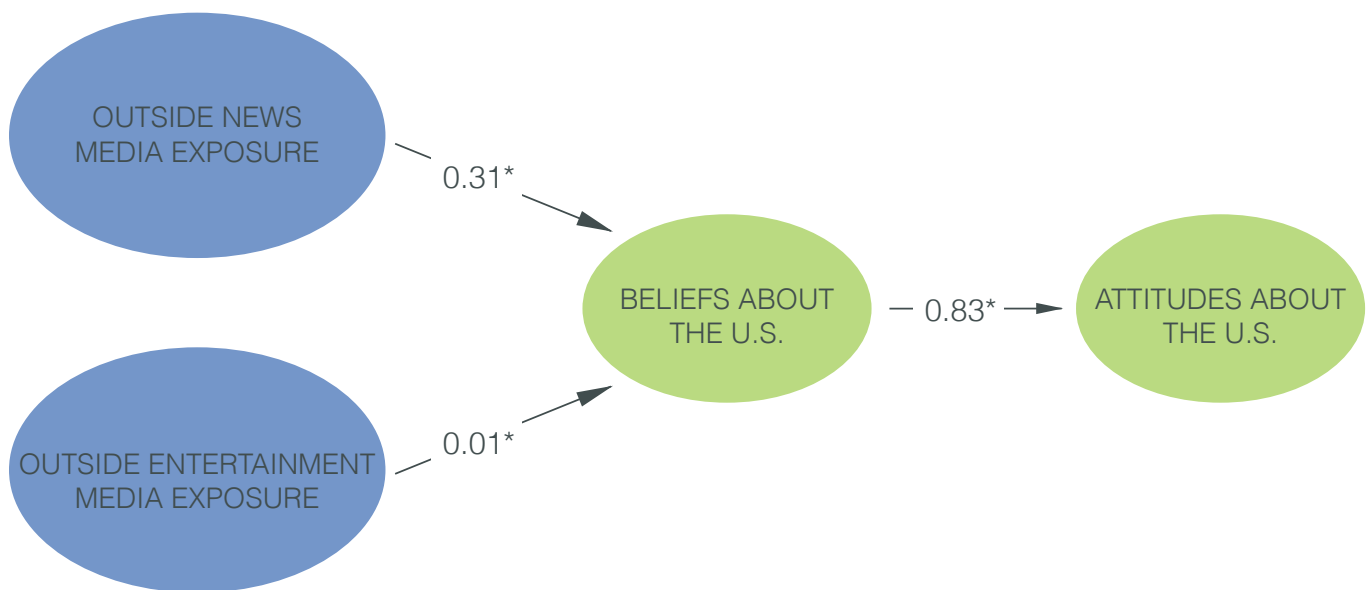
— 0.76* →



* $p < .05$



* $p < .05$



* $p < .05$

APPENDIX 6

SURVEY TECHNICAL NOTES

2010 BBG NORTH KOREAN REFUGEE AND TRAVELER SURVEY

Sample design: Convenience non-probability sample of North Korean refugees and travelers in Yanbian Korean Autonomous Region, PRC.

Sample size: 250 adults (age 15+).

Margin of error: Not applicable (as a non-probability sample method was used).

Date collection method: Face-to-face survey.

Fieldwork dates: 3 March to 30 September 2010.

- The sample contained more female respondents than it did male respondents – approximately 61:39 female to male. This is unsurprising as the proportion of female refugees continues to grow in comparison to males.
- As it is currently impossible to draw a nationally representative sample inside North Korea or in China, these results should not be used to make generalizations or draw conclusions about populations inside North Korea or the larger population of North Koreans in China. This survey necessarily employs a non-probability convenience sample and the results are not directly comparable across years. The results represent the views of these 250 refugees and travelers only.

2011 RECENT NORTH KOREA DEFECTOR SURVEY

Sample design: Convenience non-probability sample of recent North Korean defectors in South Korea.

Sample size: 420 adults (age 15+).

Margin of error: Not applicable (as a non-probability sample method was used).

Date collection method: Face-to-face survey.

Fieldwork dates: 10 August to 31 October 2011.

- 420 North Korean defectors, all of whom left North Korea no earlier than 2009 were interviewed in the Seoul metropolitan area. At the time of the survey there were approximately 2,000 defectors who left North Korea in 2009 or after living in the Seoul metropolitan area. Thus the 400 plus interviews conducted represents about 20 percent of the total possible interviewees.
- Depending on their degree of media exposure, the respondents were divided into three groups: those who were heavily exposed to foreign media (110), those who had intermediate exposure to foreign media (200) and those who did not have any exposure to media contact (110).
- Further recruitment quota subdivisions were also made between news and entertainment media exposure in order to ensure a full range of media exposure profiles thereby enabling the most robust SEM analysis.

CLASSIFICATION	NUMBER OF PEOPLE
Heavy exposure group	110
Intermediate exposure group	200
No exposure group	110
Total	420

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- 2 Used with permission of the Broadcasting Board of Governors (BBG).
- 3 <http://www.freedomhouse.org/report-types/freedom-press>.
- 4 In order to assess the speed and degree of the changes occurring in the North Korean media environment, since 1999 InterMedia has been conducting research on North Korea on behalf of the BBG, which operates all U.S. international public broadcasters, including Radio Free Asia and Voice of America. In 2003 InterMedia began an annual quantitative survey of North Korean refugees and travelers.
- 5 Note that this chart refers to access to media devices not necessarily to ownership of devices.
- 6 Official incomes in North Korea often do not reflect individuals' purchasing power. Evidence suggests that media devices are increasingly affordable to North Koreans because such items are available in markets in the North, and refugees and defectors increasingly report having purchased and used such items when in North Korea.
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- 10 Used with permission of the BBG.
- 11 Survey technical notes available in Appendix 6.
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