

Research Summary Report

African Media Development Initiative



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Introduction

Fostering a stronger media in Africa is an indispensable part of tackling poverty, improving development and enabling Africa to attain its development goals.

This Research Summary Report of the findings of the African Media Development Initiative (AMDI) provides a unique set of insights showing how donors, investors, media and media development organisations can collaborate in supporting and strengthening Africa's media sector.

The Initiative was the most extensive independent survey of the state of the media across 17 sub-Saharan African countries: Angola, Botswana, Cameroon, Democratic Republic of Congo, Ethiopia, Ghana, Kenya, Mozambique, Nigeria, Senegal, Somalia, South Africa, Sierra Leone, Tanzania, Uganda, Zambia and Zimbabwe. Copies of the individual country reports are included on the enclosed CD.

The study aimed to: assess the key changes and developments in the media sector in Africa over the past five years; to show how training and capacity building activities have contributed to the development of the media; and to identify future actions with the greatest potential impact on the development of the media sector in Africa.

Arising from the 2005 Commission for Africa, the project was delivered by Ahmadu Bello University (Nigeria), BBC World Service Trust, Rhodes University (South Africa) and a network of researchers from 17 African countries.

On behalf of everyone at the BBC World Service Trust, I would like to thank: the members of the AMDI Advisory Group and research team; the project funders, the Bill & Melinda Gates Foundation, the UK Government's Department for International Development (DfID), the International Finance Corporation (World Bank Group) and Irish Aid; and all those who participated in this important study.

Stephen King
Director
BBC World Service Trust

Acronyms

ABC Audited Bureau of Circulation

ACA Advertising and Commercial Association

ACHPR African Commission on Human and Peoples' Rights

AfriMAP Africa Governance, Monitoring and Advocacy Project

AIP Association of Independent Publishers

AIPPA Access to Information and Protection of Privacy Act

ALTERCOM Association des Femmes pour la Communication Alternative (Association for Women and Communications)

AMARC World Association of Community Radio Broadcasters

AMDI African Media Development Initiative

ARDA African Radio Drama Association

ART Agence de Régulation des Télécommunications (Telecommunications Regulation Authority)

ATV African Together Vision

AU Africa Union

BBC British Broadcasting Corporation

BBC WST British Broadcasting Corporation World Service Trust

BOCONGO Botswana Council of NGOs

CAFEC Exchange Centre for Congolese Law

CATIA Catalysing Access of ICTs in Africa

CIDA Canadian International Development Agency

CMC Cameroon Media Council

CNRA Conseil National de Régulation de l'Audiovisuel (National Council for the Regulation of Broadcasting)

CORNET Community Radio Network

CPI Corruption Perceptions Index

CRDA Christian Relief and Development Agency

CRTV Cameroon Radio and Television

DfID Department for International Development (UK)

DRC Democratic Republic of Congo

ECOWAS Economic Community of West African States

EKOWISA E-Knowledge for Women in Southern Africa

FAMEDEV Inter-African Network for Women, Media, Gender and Development
FASIC Faculty Institute for Information and Communication Sciences
FES Friedrich Ebert Stiftung
FXI Freedom of Expression Institute
GCIS Government Communication and Information System
GDCC Gina Din Corporate Communications
GEMSA Gender and Media Southern Africa
GJA Ghana Journalists' Association
GRET Groupe de recherche et d'échanges technologiques (Research and Technology Exchange Group)
HAM High Authority for Media
HIVOS Humanist Institute for Cooperation with Developing Countries
IAJ Institute for the Advancement of Journalism
ICS Social Communication Institute
ICTs Information and Communication Technologies
IFC International Finance Corporation
IFJ International Federation of Journalists
IPDC Intergovernmental Programme for the Development of Communication
IREX International Research and Exchanges Board
ITU International Telecommunication Union
IUPA Indiana University of Pennsylvania
JED Journaliste en Danger (Journalist in Danger)
KAS Konrad Adenauer Stiftung
MAELEZO Tanzania National Department of Information Services
MCK Media Council of Kenya
MDDA Media Development and Diversity Agency
MDGs Millennium Development Goals
MFWA Media Foundation for West Africa
MIC Media and Information Commission
MISA Media Institute of Southern Africa
MMP Media Monitoring Project
MMPZ Media Monitoring Project Zimbabwe

MMS Media Marketing Services
MTN Mobile Telephone Network
MWASA Media Workers' Association of South Africa
NBC National Broadcasting Commission
NCA National Communications Authority
NCC Nigerian Communication Commission
NEPAD New Partnership for Africa's Development
NGE Nigerian Guild of Editors
NGO Non-Governmental Organisation
NiZA Netherlands Institute for Southern Africa
NMC National Media Commission
NORAD Norwegian Agency for Development Cooperation
NSJ Southern African Media Training Trust
NUJ Nigerian Union of Journalists
NUSOJ National Union of Somali Journalists
OSISA Open Society Institute for Southern Africa
OSIWA Open Society Initiative of West Africa
OTM Mozambican Workers' Organisation
PAMRO Pan African Media Research
PANA Pan-African News Agency
PAZA Press Association of Zambia
PISA Panos Institute Southern Africa
PMSA Print Media South African
PSTN Public Switched Telephone Network
SAARF South African Advertising Research Foundation
SABA Southern African Broadcasting Association
SABC South African Broadcasting Corporation
SAEF South African Editors' Forum
SAIMED Southern Africa Institute for Media Entrepreneurship Development
SAMDEF Southern African Media Development Fund
SANEF South African National Editors' Forum
SJC School of Journalism and Communication (Gimlekollen)

SLAJ Sierra Leone Association of Journalists
SLBs Sierra Leone Broadcasting Service
SMIEIS Nigerian Small and Medium Industries and Equity Investment Scheme
SNJ Mozambican Journalists' Union
SOCDA Somali Organisation for Community Development Activities
SPI Sol Plaatje Media Leadership Institute
STREAM Strengthening African Media
SYNPICS Syndicat des professionnels de l'Information et de la Communication du Sénégal (Senegal Union of Information and Communication Professionals)
TAMWA Tanzania Media Women's Association
TBN Trinity Broadcasting Network
TIWA Technology Initiatives of West Africa
TWN Third World Network
UJA Uganda Journalists Association
UMI Uganda Management Institute
UMWA Uganda Media Women's Association
UNDP United National Development Programme
UNECA United Nations Economic Commission for Africa
UNESCO United Nations Educational, Scientific and Cultural Organisation
UNILAG University of Lagos
UNIC United Nations Information Centre
UNICEF United Nations Children's Fund
UNPC Union Nationale de la Presse du Congo (National Union of the Congolese Press)
UNSAID United States Agency for International Development
URTNA Union of National Radio and Television Organisations of Africa
USIU United States International University
WAJA West African Journalists' Association
WANAD West African Newsmedia and Development centre
WILL Wireless Local Loop
ZaCoMeF Zambia Community Media Forum
ZAMPS Zimbabwe All Media and Products Survey
ZANU-PF Zimbabwe African National Union-Patriotic Front



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Background and Summary of Findings

“ Independent media institutions, public service broadcasters, civil society and the private sector, with support from governments, should form a consortium of partners, in Africa and outside, to provide funds and expertise to create an African media development facility. ”¹

Our Common Interest, Report of the Commission for Africa, March 2005

The year 2005 was one of unprecedented attention and commitment to Africa from the international community. The group of G8 leaders, the wider aid community and the general public displayed a new sense of urgency and desire for action.

The media have always been entwined with public attitudes to Africa – prompting concern at images of suffering, acting as a catalyst for debate and protest. Despite this, far too little understanding and appreciation have been given to the way that the media in Africa itself, in all of its different guises, can help advance a country’s economic and social development. The media have a critical role to play in aiding good governance, transparency and accountability. A pluralistic and free media sector has always been needed to ensure that all voices in society are heard. And, the media are increasingly an important tool for supporting health and education development – tackling HIV/AIDS and supporting education programmes.

This report owes its existence, in part, to the prompting of the Commission for Africa report, *Our Common Interest* (March 2005), which highlighted this fundamental role of the media. The report made a much-needed call for greater attention, resources and collaboration in helping to strengthen the African media sector. Its recommendation created a unique opportunity to identify ways that donors, investors, media and media development organisations can collaborate in supporting the growth and strengthening of the media sector in Africa.

This report, therefore, starts from the position that fostering a stronger media in Africa is an indispensable part of tackling poverty, improving development and enabling Africa to attain its development goals.

The African Media Development Initiative (AMDI)

The BBC World Service Trust operates a wide range of media development programmes in Africa. In order to share lessons from its own work, and to bring in others' experiences, the Trust established the African Media Development Initiative (AMDI) as a vehicle from which to learn more about the challenges and opportunities in the development of the media sector in Africa. This initiative, carried out in collaboration with the United Nations Economic Commission for Africa (UNECA) and led by a group of senior African media experts, aims to build on the Commission for Africa recommendations, and to find ways to improve the effectiveness of media support work focused on strengthening the media in Africa.

A starting point was a widely-held view that too many media development investments have been unviable – lacking in scale and sustainability, strategic focus, coordination and an ability to demonstrate or monitor impact. And, too often, activities are driven by external agendas as opposed to local needs. The aspiration of this initiative, as a result, has been to build an evidence-based case for investments and activities that seek to find new and better ways to work.

Research

In order to produce recommendations for future media development activities that are evidence-based and grounded in African experiences and voices, the Trust embarked on an ambitious research effort. The aim of this research was to provide a snapshot of a representative number of sub-Saharan African countries² and answer the following three questions:

1. What are the key changes/developments in the media sector over the past five years?
2. How have media development activities contributed to the development of the media during this time?
3. What contributions are likely to make the greatest impact on the development of the media sector within sub-Saharan Africa in the future?

This research effort was not designed to be comprehensive – geographically or substantively. Rather, it is meant to assist in informing future deliberations with an up-to-date sense of the current media landscape, the lessons learned in terms of which media development activities seem to be working and not working, and insights into future activities. It is our hope that the work will serve to influence the eventual response to the Africa Commission's recommendation, as well as contributing to a host of other efforts that may emerge as media are increasingly seen as an important investment in Africa's future. To aid in providing a fuller picture, a review of previous work that lists complementary sources of excellent research on African media development activities is provided throughout the report.

The research summarised in the following report is drawn from 17 in-depth Country Reports. It was conducted in partnership with Rhodes University in South Africa, Ahmadu Bello University in Nigeria and a network of African researchers across 17 countries³. Research methodology briefings were conducted in Grahamstown (South Africa), Zaria (Nigeria) and Dar es Salaam (Tanzania) in February 2006.

In the context of this research, media development activities are understood to mean internally or externally funded activities that contribute to the development of a private, public and/or state media sector that is both independent and pluralistic. They include activities that focus on:

- developing or influencing legislative or regulatory frameworks to support media;
- change management within media organisations;
- training and curriculum development for media practitioners;
- content development;
- audience research and media monitoring monitoring; and,
- establishing or supporting media enterprises and the development of independent or alternative media outlets.

Two methods were employed to gather the data: 1) a media landscape study based on desk research and observations about the developments in the media sector over the past five years; and, 2) in-depth audio-taped interviews, using a semi-structured interview guide, with key stakeholders. Approximately 15 interviews were conducted in each country in order to include representatives from government, NGOs, private media, state media and educational sectors. In addition to those consulted at the country level, interviews were also conducted at the continental and international level, comprising a total of nearly 300 interviews⁴. Each country-based researcher generated a report on the research findings for his/her country, in addition to a case study intended as an illustration of good practice in media development. These Country Reports and case studies are to be published separately and are available online and in the CD accompanying this report⁵.

Accurately distilling the wealth of information gathered from 17 countries in a research summary report is virtually impossible, although that is what the authors have attempted. This report aims to identify areas of consensus and shared viewpoints that emerged from the wide range of countries examined. Additional specific and in-depth observations can be found in the Country Reports referenced earlier.

To complement the core research programme and provide a wider picture for future deliberations, the BBC World Service Trust undertook additional research and consultation efforts: with the private sector on issues of financing and capacity building; and, with directors-general of African state broadcasters on issues of public broadcasting reform. Some of those findings are incorporated into this report⁶.

Support

The BBC World Service Trust would like to acknowledge and thank a number of organisations and individuals who have contributed greatly to this initiative.

The United Nations Economic Commission for Africa (UNECA) has collaborated with AMDI in leading its own series of consultations – “Strengthening Africa’s Media” or STREAM – on supporting African media. We also appreciate the inputs provided by the African Development Bank and the NEPAD e-Africa Commission to the consultations.

The UK Department for International Development (DfID) has been generous in its support of AMDI, beginning in November 2004 with a jointly hosted conference with the Trust. Input was made to the Commission for Africa, through a number of international and African consultations, up to this research report. We look forward to DfID's continued involvement.

The International Finance Corporation (IFC), Irish Aid and the Bill & Melinda Gates Foundation have also contributed both resources and intellectual leadership to the project, and we hope that they will be involved in the next steps.

Lastly, AMDI has benefited from the guidance of an Advisory Group comprised of leading media practitioners from across Africa. They are drawn from key stakeholder constituencies, and are reflective of the diversity of the continent. The BBC World Service Trust is grateful for the commitment and leadership the Advisory Group has demonstrated to the project. They are:

- Amadou Mahtar Ba – President and Director, AllAfrica Global Media, USA
- Luckson Chipare – Media Consultant, Namibia
- Wilfred Kiboro – Chief Executive, Nation Media Group, Kenya
- Arlindo Lopes – Journalist, Mozambique
- Moeletsi Mbeki – Chairman, KMM Review Publishing Company (Pty) Ltd, South Africa
- Edetaen Ojo – Executive Director, Media Rights Agenda, Nigeria
- Lynne Muthoni Wanyeki – former Executive Director, African Women's Development and Communication Network, Kenya

The report was made possible through the collaboration of Rhodes University and Ahmadu Bello University, and the efforts of African researchers. Together they completed the work under tight time pressures and often difficult circumstances.

Finally, we would like to thank the more than 300 individuals who gave of their time and views generously.

End Notes

¹ For further information, see *Our common interest*, Report of the Commission for Africa, March 2005, p. 143.

² Angola, Botswana, Cameroon, DRC, Ethiopia, Ghana, Kenya, Mozambique, Nigeria, Senegal, Sierra Leone, Somalia, South Africa, Tanzania, Uganda, Zambia, Zimbabwe. The countries varied in their ranking on the Human Development Index (HDI) and in population size, and included Anglophone, Francophone and Lusophone countries.

³ A list of country researchers is provided in Appendix A.

⁴ See Appendix B for a list of interviewees.

⁵ For access, please visit <http://www.worldservicetrust.org/amdi>.

⁶ An earlier version of this report formed the basis of discussions at a Technical Workshop held in Nairobi on 27-29 September 2006. The meeting, that was attended by approximately 25 experts in media development, was hosted by The Nation Group and led by the AMDI Advisory Group. At the workshop, stakeholders had an opportunity to review and comment on the draft report. Recommendations and comments about the draft that emerged at these deliberations have been incorporated into this final published version.



Summary of Findings

The research review has generated a number of important findings relevant to the design and priorities of a facility or programme to strengthen media development in Africa.

General observations

Information deficit

The study has provided new and substantial information about the current state of the media in 17 sub-Saharan African countries, a significant sample. The picture is of a sector undergoing significant growth and transformation due to democratic reform and globalisation, typically accompanied by economic growth and the availability of new technologies. However, despite the wealth of valuable insights available from other published research, systematic and reliable data on the sector is underdeveloped or non-existent. There is a lack of robust research, on a continental scale, demonstrating what is and is not working in the attempts by many players to strengthen African media. The lack of reliable information has been a factor constraining private and public (donor) investment.

Media landscape: Media growing in diversity and number

In the countries surveyed, media are serving populations that are growing, primarily among young, rural and non-literate demographic groups. Radio dominates the mass media spectrum with state-controlled radio services still commanding the biggest audiences in most countries but regional (within country) commercial stations demonstrating the largest consistent increases in numbers, followed by community radio, where growth, although significant in certain countries, has been inconsistent. Television is less widely available, especially in rural areas, although it is seen as a growing force. Newspapers remain concentrated in urban centres with varying growth patterns across the countries. In the new media sector, the adoption of mobile telephony has been the most spectacular, far exceeding uptake of the Internet.

Need for a holistic approach to strengthening the sector

The media environment benefits from three distinct components:

- **Community media** are non-profit, small-scale private enterprises, and some state-owned community-based radio stations, that generally serve the interests of local communities. This sector was seen by a majority of respondents to have a special role in advancing development objectives, giving a voice to communities, and was recognised for its ability to empower and skill communities. Its principal challenge is financial sustainability and continued dependence on donor funds. In addition, the number of community print media is growing in some countries – they face the same challenges of media sustainability.
- **State-owned media, especially broadcasting services**, have the widest reach, and potentially, the greatest influence. Alternatively, shortages of resources and trained personnel can result in poor-quality programming, pro-government bias and over-concentration on urban issues. On financing, a minority of interviewees thought that state media receive sufficient support from donor agencies. However, financial insecurity caused by lack of stable government financing results in a need to seek resources from advertising, thus depressing the opportunity for private stations. Their principal challenge is to serve all sections of the population and to become genuine public service broadcasters, impartial and free from government interference. In addition to broadcasting, most governments in Africa own/control newspapers and news agencies, and most of them operate with a pro-government bias.
- **Private media**, a growing factor, are seen as injecting an independent element, able to act as a watchdog of government and able to help hold government to account. Some private radio media are considered to be driven solely by profit and too compliant with business interests, to the detriment of good quality programming serving a wide audience. Critics suggest they are over-reliant on cheap or foreign imports, or 'dumbing down' of content. Private print media are increasingly contributing to the diversity of the media landscape. A worrying factor is the recent spread of yellow-press tabloids that often fall foul to low professional standards.

There was consensus that each sector has a unique yet complementary role to play in a pluralistic media landscape. A holistic approach, that includes them all, is required for any media development strategy and to develop a more responsive and representative landscape to serve all groups in a country – especially the poor. Among those surveyed, the community media sector, especially radio, was considered amongst the highest priorities for new funding, in view of its development role.

Gap assessment – the lack of strategic perspective

The research revealed areas of strategic importance to the strengthening of the media sector where views were muted, and where the strategic awareness of the sector as a whole might be characterised as low. The impact of new technologies on information and knowledge transfer, for example, creates huge opportunities and threats for every newspaper, magazine, radio and TV channel. Mobile telephony and the rapid roll-out of satellite sports channels, especially of football, have changed the way even very poor people consume information in Africa. Equally, only some of those working around policy reforms in the regulatory environment (dealing with governance issues) had fully recognised the potential link with new African-led governance processes. These are examples of areas that did not surface in a significant way in the research. Respondents felt that there are insufficient mechanisms promoting analysis and common strategies. If it is hard to get the big picture, this points to the potential value of a facility or programme helping to provide better intelligence and leadership for media development.

Development policy and media

The strengthening of the media sector arguably has a twin function – with media serving society as an agent of development, and also acting as an agent for economic growth by stimulating the growth of consumer markets. The research confirmed that given these facts, the media sector’s priority as an agent of change within the development “debate” is surprisingly undervalued by the international community. This may be because the sector is politically sensitive. Whatever the cause, up until now, support for strengthening media is a “blind spot” for the majority of development agencies and has not had a high priority in strategies to tackle governance problems. The media’s contributing role to the achievement of the Millennium Development Goals (MDGs) needs to be given higher priority.

Donor impact and coherence

According to our research, there are not enough efforts in Africa to develop holistic donor strategies (in relation to funding, capacity-building or training), apart from a few notable exceptions. There is a collection of *ad hoc* programmes of varying quality. The research was not able to measure accurately the monetary value of actual investments in the sector but we believe this value may have fallen in the past five years. Substantial evidence is, however, provided that points to: non-sustainable and short-term approaches to projects; disconnected programmes; unnecessary competition amongst donors; and, consequent wasted investment of donor funds. A coherent and clear donor/support strategy would significantly improve impact.

Challenges and opportunities

Regulatory reform and the enabling environment

The paradigm for the media governance environment has shifted over the past decade. It is now generally based on a democratic model of separation of powers – the establishment of independent broadcasting regulatory bodies – while acknowledging the right of the broadcasting media in general to regulate themselves (media councils). This is accompanied by adopting freedom of information legislation and pursuing the goal of transforming state broadcasting into public-service broadcasting. The political underpinnings of this model have been endorsed and promoted by various declarations, such as the Declaration of Principles on Freedom of Expression in Africa adopted by the African Union’s African Commission on Human and Peoples’ Rights in 2002.

However, the research revealed that there are varying levels of implementation and commitment to the democratic model’s principles. At a **legislative** level, there are many examples where no relevant laws or legislative provisions are in place to reflect these principles, or where implementation of legislation has been delayed for a number of years. At the **implementation** level, there are concerns that interpretation and application of enacted laws do not create genuinely “independent” bodies, but rather ones in which the executive branch of government still exerts undue influence. There is recognition that the emergence of a healthy enabling environment cannot be achieved quickly. The research points to the value of a regional approach (that can help create a space for debate and provide coherence and quality in interventions), and the importance of engagement with multiple stakeholders. Three areas were identified as future priorities for the creation of an enabling media environment: advocacy and lobbying; supporting and establishing public broadcasting services and independent regulatory bodies; and, supporting private media development.

Professionalisation

Low levels of professional, ethical, management and technical standards are reported consistently among media practitioners in the countries surveyed. These low standards are attributed to four factors:

- insufficient or poor-quality training institutions;
- rapid expansion of media outlets, that has further strained resources;
- low salaries and status, with the resulting prevalence of “brown envelope” (bribery-based) journalism; and,
- skills exodus (eg, poaching of staff to better-paid UN, donor or NGO projects).

Three lessons emerged: the importance of having a tailored needs-based approach at a national level with regional support; the need to establish professional standards developed by the media fraternity itself, ideally in collaboration with well-respected institutions; and, the need to generate evidence of the impact of professional development efforts. Corresponding priorities fall into three categories: in-house professional development for media organisations; support for educational and training institutions; and, establishment of credible accreditation systems for training institutions.

Equipping the sector

There are significant challenges to equipping the sector. The state of equipment, facilities and technical support within the media sector in sub-Saharan African countries is generally poor. Among the initiatives reviewed, central and long-term funding for equipment and infrastructural support have been deemed effective (alongside media reform efforts). Priorities in this area include the direct funding of new equipment; support for upgrading existing equipment; ICT skills training for staff; creating mechanisms to enable media organisations to share technical facilities; and, sourcing opportunities for joint purchasing of equipment.

Improving financial sustainability

A core issue is how the financial sustainability of community, public and private media can be improved. The research identified a cluster of areas where the business environment for media could be improved. The growth of private media will require new commercial lending in higher-growth economies, and more appropriate donor support in low-income countries that cannot sustain large numbers of commercially-funded media outlets. There is a financing “gap” and a need to make more capital available, especially to medium-size players, that many different kinds of initiatives could assist – through, for instance, helping foster better use of existing soft loan funds, supporting projects coming to market, and reducing costs (eg, through shared buying arrangements for equipment and shared technical facilities). Future initiatives should also support efforts to increase advertising revenues for all media alike – efforts that, outside of one or two countries, are held back by a lack of accurate market data and audience measurement. In addition, there is a need to develop creative funding mechanisms for public and community media that will ensure their sustainability.

Programming and local content

Future priorities include support for the development of a local production skills base, creating a body of content focused on social and development issues, and the need to address the lack of audience research and monitoring. The delivery of these objectives could be facilitated by provision of equipment, training programmes, support to new and existing independent news agencies, market research, and regulatory reform and monitoring. A significant constituency believes that community media should receive the greatest support, because of their role in giving a voice to rural and/or marginalised and poor communities and those without access to mainstream media, as well as community media's role in delivering content that is part of a development agenda.

Looking ahead

Where a new initiative could add value

There is strong support for a pan-African initiative that would complement national interventions. The potential benefits are identified as stronger advocacy to the international community and pan-African bodies, shared learning, improved access to resources, reduced costs (via joint purchasing power) and better-focused funding. The initiative's focus should be on boosting funding (private and public), garnering the support of pan-African governance structures, developing higher consistent standards of professionalism, stimulating transformation of state into public broadcasters, improving (where needed) coordination of donor activities in media development, and eliminating duplication at the point of delivery.

Defining characteristics

There was wide consensus on factors that should inform the way any new initiative works:

- ❑ Respondents overwhelmingly felt that there is no need to create another media support organisation. What is urgently required is a new partnership structure that can help to better harness existing resources and create a platform for more significant investment.
- ❑ The initiative should be African-led, involve all stakeholders engaged in media support, and be able to improve coordination between the multiple agencies participating in the process.
- ❑ The initiative needs to be autonomous in terms of any funding structure and operations.
- ❑ Any new initiative should be able to address the specific and unique media development needs of countries that are at different stages of development⁷. It should embrace and, where necessary, strengthen the organisations and institutions that are already engaged in each endeavour, rather than create new structures.
- ❑ Activities should be implemented according to clear criteria. These are summarised in Chapter Seven of this report with regard to design, approach and organisational framework. A number of principles, to inform the design of successful media development initiatives, emerged from the research. These were: a locally- or regionally-defined agenda, a needs-based approach, a collaborative approach, built-in sustainability, appropriate timeframes, and evaluation and monitoring mechanisms integrated from the start.

End Notes

⁷ Such a framework would provide primary tools of media infrastructure and basic journalism/curriculum development in, for example, post-conflict or less developed countries, alongside efforts to build and support the regulatory framework; mid-career training and development for journalists; and support for emergent private media and provision of business media tools (eg, data) for those further along.



1. Research Objectives and Methodology

The objective that this programme of research has sought to address is to identify the strategic priorities for developing an initiative that will strengthen the media within sub-Saharan Africa. Underlying this key objective, and implicit in the phrase “strengthen the media”, is an assumption that the aims of the 1991 Windhoek Declaration on Promoting an Independent and Pluralistic African Press and the African Commission for Human and Peoples’ Rights 2002 Declaration of Principles on Freedom of Expression in Africa represent a valid starting point. These aims encourage an independent and pluralistic media within African states and provide constitutional guarantees to ensure the freedom of the media, two critical factors in furthering media development in sub-Saharan Africa.

To answer the overarching research question, the following three core research questions were identified. These formed the basis of the research design and methodology, the sample design, the research protocols and the analyses:

1. What are the key changes/developments in the media sector over the past five years?
2. How have media development activities contributed to the development of the media sector during this time?
3. What contributions are likely to make the greatest impact on the development of the media sector within sub-Saharan Africa in the future?

1.1 Research parameters and definitions

The defining parameters and definitions for the research are set out below.

a) Media sector: In the context of this research, the media sector refers primarily to television, radio, newspapers, and information and communication technology (including the Internet and mobile telephony).

b) Media development activities: In the context of this research, media development activities refer to internally- or externally-funded activities that contribute to the development of private, community, public and/or state media that are both independent and pluralistic. This will include activities that focus on:

- developing or influencing legislative or regulatory frameworks to support media;
- change management within media organisations;

- training and curriculum development for media practitioners;
- content development;
- audience research and media monitoring; and
- establishing or supporting media enterprises and the development of independent or alternative media outlets.

1.2 Research scope and management

The research was conducted across 17 countries in sub-Saharan Africa chosen to represent a wide range of demographic, linguistic, political, economic and media situations. The countries were grouped into three geographic regions for research logistics and administrative purposes (see table below). A country-based researcher was recruited in each of the countries to be responsible for the data collection and management, quality and reporting of the research. The Country Researchers' work was, in turn, managed and directed by the Regional Hub Directors at the collaborating universities: Ahmadu Bello University in Nigeria and Rhodes University in South Africa.

East Africa	West Africa	Southern Africa
Democratic Republic of Congo (DRC)	Cameroon	Angola
Ethiopia	Ghana	Botswana
Kenya	Nigeria**	Mozambique
Somalia	Senegal	South Africa**
Tanzania*	Sierra Leone	Zambia
Uganda		Zimbabwe

* Location of methodology briefing

** Research briefing partner and regional hub

At the outset of the project, the BBC World Service Trust held a series of intensive research briefings. The briefings – each lasting two days – were organised by geographic region with researchers asked to attend their relevant regional workshop. The first briefing was held at Rhodes University in Grahamstown, South Africa, followed by one at Ahmadu Bello University in Zaria, Nigeria and a final one at the University of Dar Es Salaam, in Dar Es Salaam, Tanzania. The briefings sought to familiarise the researchers with the goals, objectives, stages and processes of the research, as well as to elicit input on the research protocols and sample design. The briefings provided a valuable consultative forum to ensure that the research protocols were able to capture the state of media development across all of the 17 countries and that the sample composition for Stage Two of the research would yield a good cross-section of interviewees across a wide range of expertise.

1.3 Research programme

The research was carried out in two stages:

Stage One: A detailed media landscape study in each of the 17 countries consisting primarily of desk research and observations; and,

Stage Two: An in-depth, qualitative study comprising high level face-to-face interviews with media practitioners, legislators, regulators, NGOs and media commentators and a case study of a media development initiative, with lessons learned.

Stage One

This stage of the research was designed to answer the first core question listed below:

What are the key changes and developments in the media sector over the past five years?

The focus of Stage One was the collection of statistics on the key media and how these had changed from 2000 to 2005. In addition, there were a number of questions that provided a gauge of media health and independence. While these were not intended to replicate or be as comprehensive as indices such as the Freedom House Index⁸ and others, their purpose was to ensure that this piece of work could stand alone as a snapshot of the state of media in each of the selected countries. There was also a short section to gauge growth of internationally-funded media development activities in each country over the past five years. In addition, researchers were asked to compile a bibliography and a brief review of current literature that exists about the state of media in their country.

The research protocol was a series of templates linked to worksheets, and data collection was largely desk-based with each researcher asked to provide sources and validate as much information about the media as possible. It was recognised from the outset that the availability and quality of data would vary considerably from country to country, and this proved to be the case. The Stage One protocol included:

- Country statistical information;
- Radio: information about the size and development of the radio sector in each country;
- Television: information about the size and development of the television sector in each country;
- Newspapers: information about the size and development of the newspaper sector in each country;
- Media support: information about the size and development of other media (new media/telephone/production agencies/market research companies, etc) in each country;
- Media health: key information mapping media legislation and regulatory reform, and including a review of current literature on this subject; and,
- NGO activity.

Stage Two

This stage of the research was designed to answer the second and third core questions:

How have media development activities contributed to the media sector during the past five years?

What contributions are likely to make the greatest impact on the development of media within sub-Saharan Africa in the future?

Two research approaches were employed to answer these questions:

1. In-depth face-to-face Interviews

The research was designed to answer these core questions through a series of in-depth face-to-face interviews (or telephone interviews where face-to-face interviews proved impossible to achieve) with key practitioners, experts and decision-makers with knowledge of the media and media development issues from a range of perspectives. Interviews were administered at the country level (15 interviews were carried out by each Country Researcher), regional level (five interviews were carried out by each of the Hub Directors) and international level (10 interviews were carried out by the London-based team members)⁹.

Country Researchers were required to conduct two pilot interviews and to send transcripts to the Regional Hub Directors who provided feedback on the interviews and transcriptions prior to the commencement of the main body of fieldwork. The interviews were semi-structured in-depth interviews, using a fully-worked interview guide. Each interview lasted between 45 minutes and one hour.

The sample list of potential interviewees for Stage Two was drawn up by the Country Researchers under the direction of the Project Research Director and sent to the Hub Directors and the Advisory Committee for approval. The segmentation for interviewee types sought to reflect the area of knowledge, expertise, background and organisation of the interviewee. Loose quotas were imposed for organisation type and sector to ensure that a balanced representation of interests, perspectives and voices were included by country and by region.

Table 1: Sample Profile of In-Country Interviews

Sector/Segment/Organisation	Examples of Suitable Interviewees
NGOs: Quota: 1 from each category	1.1 Senior personnel from NGOs involved in training journalists and other media practitioners 1.2 Senior personnel from NGOs involved with developing/influencing legislative and regulatory frameworks 1.3 Senior NGOs involved with implementing organisational changes/influencing regulatory frameworks 1.4 Senior personnel from NGOs involved with advocacy (e.g. campaigning for gender equality for media employees)
Government departments/civil service: Quota: 1 from each category	2.1 Government ministers or senior civil servants with responsibility for media 2.2 Government ministers or senior civil servants with responsibility for legislative frameworks supporting media structure 2.3 Senior members of quasi-government bodies such as broadcast and press regulatory bodies
Media practitioners: Quota: 1 from each category	3.1 Senior practitioners from state/public sector - all media 3.2 Senior practitioners from private sector - all media 3.3 Media entrepreneurs, e.g. those running production companies, Heads of Advertising agencies, Heads of Research agencies
Commentators/academics: Quota: Maximum 2	4.1 Analysts and writers who are experts on the media (maximum of two of these)
Educators: Quota: 2	5.1 Those responsible for training journalists and media practitioners (other than NGOs who are listed above), e.g. heads of journalism schools or departments
Miscellaneous: Quota: 1 or 2	6.1 Those involved with media networks/media lobbying groups, heads of Journalists or other trades unions

2. Case study

The Country Researchers were asked to identify – during the course of Stage One and Stage Two – an example of a media development initiative or programme that was considered to have been a success and to produce a brief case study. The Regional Hub Directors were responsible for ensuring that media development initiatives showcased in this way represented a good cross-section of different types of activities.

Table 2: Summary of Research Stages and Methods

Research Stage	Method
Stage One	Desk research, using templates/tables to record data/summaries of research/bibliographies
Stage Two (in-depth interviews)	Face-to-face in-depth interviews 15 per country 5 per regional hub 10 international
Stage Two (case study)	Case studies (one per country); based on academic review and primary interviews as necessary

End Notes

⁸ The index assigns degrees of freedom to countries through numerical ratings of civil liberties and political rights by experts. The index is released annually and is available at www.freedomhouse.org

⁹ The names and institutional affiliations of all interviewees (in-country, regional and international) are listed in Appendix B.



2. Media Landscape

2.1 Survey of findings

The following section provides an overview of the media landscape across the 17 AMDI research countries. This chapter consists of six sub-sections, most of which explore either a medium or a segment of the media industry. However, this chapter opens with a demographic profile of the countries surveyed. The aim of this brief review is to contextualise and highlight key characteristics of media audiences. Next, the consumption and growth patterns in radio are discussed. This is followed by a similar analysis of television and then newspapers. The journalism profession is then examined with the number of journalists, professional development and journalists' pay highlighted. An overview of telephony and Internet statistics is then followed by the final section on media agencies. This last component surveys data gathered on news agencies, advertising and research companies as well as non-governmental organisations (NGOs) across the AMDI research countries. A more detailed and country-specific portrait of the media landscape may be found in the individual Country Reports in the CD attached to this report.

2.2 Demographic profile

In order to ground the discussion of media consumption and growth patterns, it is valuable to review the demographic character of these countries. While more detailed information is provided in the individual Country Reports, the following section highlights key attributes, such as population, literacy rate and urban/rural split, all of which have an impact on current and future media audiences.

- The populations in all of the countries surveyed have shown increases in recent years. Although in many cases population census data may be somewhat out of date, data verification supports the fact that the populations in many sub-Saharan countries are increasing. Some of the countries surveyed are showing dramatic population rises – Ethiopia and Mozambique have grown by over 20% in the past five years and Kenya, Zambia and Uganda are registering growth rates of between 8% and 12%.
- In all of the countries surveyed, the population profiles tend to skew very young – as a consequence of rapid population growth and relatively low life expectancy levels, especially due to the HIV/AIDS pandemic. As many as four in 10 (40%) of the people living in 15 of the 17 countries surveyed are aged 14 or under (the only two exceptions being South Africa (33%) and Botswana (38%). With 50% of its population aged 14 or under, Uganda is the country in the survey with the most skewed population profile.

- While literacy rates are growing in a number of countries and are quite high in some (South Africa 82.4%), they are still very low in over half of the countries surveyed, particularly among females and those living in rural areas. Fewer than six in 10 (60%) women are literate in nine of the 17 countries surveyed.
- In nine of the 17 countries, more than 60% of the population lives in rural areas with restricted access to most forms of media, mainly due to the lack of transport facilities and electricity (eg, in Kenya only 8% of the rural population has electricity).

There is a dearth of publicly available data on the media sector in sub-Saharan Africa. In the absence of such information, the media landscape information gathered in this research is an attempt to establish a benchmark of consistent, complete and up-to-date measures on a range of key media indicators¹⁰. The media in the countries surveyed are serving populations that are growing and are primarily young, rural and non-literate. Radio dominates the mass media spectrum with regionally-based commercial stations demonstrating the largest consistent growth in numbers, followed by community radio, where increases have been reported only in certain countries and growth is inconsistent. Television is becoming more widespread although growth over the past five years is less dramatic than that reported for radio. Newspapers remain concentrated in urban centres with varying growth patterns across the countries. In the new media sector, the adoption of mobile telephony has been the most spectacular, far exceeding the uptake of the Internet.

One valuable measure of the dynamism of the media sector is the number and range of supporting agencies, including advertising agencies, repetition, market research companies and media monitoring agencies. All countries – with the exception of South Africa and Tanzania – report the existence of at least one state-owned or state-controlled news agency. Six of the countries report no private news agencies (Uganda, Angola, Mozambique, Cameroon, Ghana and Sierra Leone). Of the 11 countries reporting the presence of private news agencies, there is huge variability in the numbers reported: Kenya, 44; South Africa, 14; Nigeria, 7; Ethiopia, 6; Zimbabwe and Senegal, 5. All the other countries have just one or two agencies.

Twelve of the 17 countries are reported as having at least one media monitoring agency, with Nigeria reporting the highest number at 25. For most countries there appears to be a vibrant community of advertising agencies, which reflects the growing advertising marketplace. Only 10 of the countries report the presence of market research agencies that conduct audience research studies.

The advertising market in Africa faces a number of challenges, the most significant being the lack of timely and comprehensive research and monitoring data – required across all media to grow the advertising market in sub-Saharan Africa. In broadcasting, current ratings are too blunt to be of value, and overnight figures are only available in South Africa. There is a need to persuade private media institutions themselves of the importance of funding such research and monitoring. Those monitoring companies that do exist, including the Steadman Group (based in Kenya) and Media Marketing Services (MMS) in Nigeria, face a particular challenge in encouraging media organisations to work together to finance large-scale data collection and research. The South African Advertising Research Foundation (SAARF) and the Pan African Media Research Organisation (PAMRO) have established a committee with the aim of finding ways of measuring media in a uniform way across the region, and this will be an important step forward.

Table 3: Demographic Profile of Countries Surveyed

	Population in Millions ¹¹		Growth Rate	Aged Under 14 Years	Aged 15-35 Years	Literacy		Literacy		Below Poverty Line
	Number	Percentage	Percentage	Percentage	Male	Female	Urban	Rural	Percentage	
					Percentage	Percentage	Percentage	Percentage		
Angola	15.5	12 (2000-4)	45	16	83	54	36	64	70 (2003) ¹³	
Botswana	1.8	0 (2000-4) ¹¹	38	15	76.1	81.5	54.2	48.8	37	
Cameroon	16	9 (2000-5)	41	36	77	59.8	48.6	51.5	48	
DRC	60	15 (2000-4) ¹¹	47	~	79.8	51.9	53.5	46.5	80	
Ethiopia	70	11 (2000-4)	45	35	49.2	33.8	15.7	84.3	50 (2004) ¹³	
Ghana	21.2	13 (2000-4) ¹⁶	39	33 (2000) ¹⁴	82.7	67.1	45.5	54.6	39.5 (1999) ¹⁵	
Kenya	33.4	11 (2000-4)	43	40 ¹²	78	70	39	60.7	50	
Mozambique	19.4	21 (1997-4)	44	33 (2000) ¹⁴	62	31	36	64	70	
Nigeria	134	2.8 (1991-2002)	51	25	74.4	59.4	47	53	60 (2000) ¹³	
Senegal	11.4	11 (2000-4) ¹¹	43	34	74.4	59.4	49.6	50.4	54	
Sierra Leone	5.3	18 (2000-4) ¹¹	43	19	39.8	20.5	38.8	61.2	68	
Somalia	8	3.3 (2000-4)	44	33	25.1	13.1	34.9	65.1	43 (at \$1) 73 (at \$2)	
South Africa	45.5	7.35 (2000-5)	33	37 (2001) ¹⁴	84.1	80.9	56.9	43.1	6	
Tanzania	37.6	8 (2000-4) ¹¹	43	34	77.5	62.2	35.4	64.6	36	
Uganda	28	14 (2002-6)	50	33 (2002) ¹⁴	78.8	59.2	11.3	87.7	55	
Zambia	11.5	15.7 (2000-5)	45	35	87	75	34	66	67	
Zimbabwe	12.9	2 (2000-4) ¹¹	40	38	94	86	35	65	80	

~ Data not available

¹¹ Source: World Development Indicators database, Country Data Profiles, The World Bank. Retrieved on 6 September 2006 from www.worldbank.org/africa

¹² Source: Research Manager, Research & Marketing Services (EA) Ltd. Personal communication (email) on 11 September 2006

¹³ Source: CIA World Factbook. Retrieved on 6 September 2006 from <https://www.cia.gov/cia/publications/factbook/index.html>

¹⁴ Source: UNSTATs report, Table 7 ("Population by age, sex and urban/rural residence: latest available year, 1994 – 2003"). Validated on 6 September 2006 from <http://unstats.un.org/unsd/demographic/products/dyb/DYB2003/Table07.pdf>

¹⁵ Source: United Nations Statistics Division. Retrieved on 11 September 2006 from <http://mdgs.un.org/unsd/mdg/SeriesDetail.aspx?srid=581>

¹⁶ Source: www.EuropaWorld.com in the Ghana profile for Area and Population retrieved on 11 September 2006 from <http://www.europaworld.com>

Sources for all other data are located in the individual AMDI Country Reports

2.3 Radio: Consumption and growth

The following section highlights research findings relevant to radio, beginning with a review of audience consumption. Next, the prevalence of state radio is contrasted with commercial radio. Growth in commercial and community radio is then examined. A brief section on religion and the media is also provided.

Radio Consumption

Radio is the most accessible and the most consumed media in all of the countries. In the nine countries where radio listening data was available, the following patterns emerged:

- **'Heavy' listening:** those registering weekly reach figures of 90%+: South Africa, Tanzania, Ghana, Mozambique, Kenya, Uganda.
- **'Medium' listening:** those registering weekly reach figures of 70%-90%: Botswana, Zambia, Zimbabwe, Nigeria.
- **'Light' listening:** those registering weekly reach figures of under 70%: Senegal, DRC, Ethiopia, Cameroon.

Table 4: Radio Consumption

	Listened Once a Week			Listened in Past 7 Days	Listened Once a Day		
	Percentage		Increase	Percentage	Percentage		Increase
	National 2000	National 2002-5	%	Report 2004-5	National 2000	National 2002-5	%
Angola	~	~	N/A	~	~	~	N/A
Botswana	~	72.3	N/A	~	~	72.3	N/A
Cameroon	64 (Urban Only) ¹⁹	83 (Urban Only) ¹⁹	30	73 (2002) ¹⁹	~	¹⁹ 51.9 ¹⁹	N/A
DRC	~	28.4	N/A	~	~	~	N/A
Ethiopia	38.2	45	17.80	72 ¹⁷	38.2	45	18
Ghana	92 ¹⁹	91 ¹⁹	-1	91 ¹⁹	~	68.91	N/A
Kenya	87.7 ¹⁹	91 ¹⁹	5	91 ¹⁹	66	76.7	16
Mozambique	~	91	N/A	91 ¹⁹	~	¹⁹ 69	N/A
Nigeria	79.5	88.4	11	88 ¹⁹	62.8	60.4	-4
Senegal	~	4.7 ²⁰	N/A	90 ¹⁵	~	75.8	N/A
Sierra Leone	~	~	N/A	~	~	~	N/A
Somalia	~	~	N/A	~	~	68	N/A
South Africa	~	92.10	N/A	91.8 ¹⁸	~	79.3	N/A
Tanzania	90 ¹⁹	95	6	90 ¹⁹	~	45	N/A
Uganda	85	93 ¹⁹	9	93 ¹⁹	~	¹⁹ 64.9 (2003) – 73.7 (2005)	14
Zambia	50	71 ¹⁹	42	71 ¹⁹	~	¹⁹ 48.9 (2002) – 52.9 (2004)	8
Zimbabwe	83.3	85.3	2	67 ¹⁹	56.5	66.6	18

~ Data not available

¹⁷ Source: Report from School of Journalism at Addis Ababa, from conversation with Jim Clarke and BBC WST on 31 August 2006

¹⁸ Source: Sue Scott, Nielsen Media South Africa. Email to BBC WST on 4 September 2006

¹⁹ Source: InterMedia National Surveys. Hard copies held on file at the BBC World Service Trust, London

²⁰ Source: Placide Yaptie, Research and Marketing Services-Senegal. Email to BBC WST on 6 September 2006

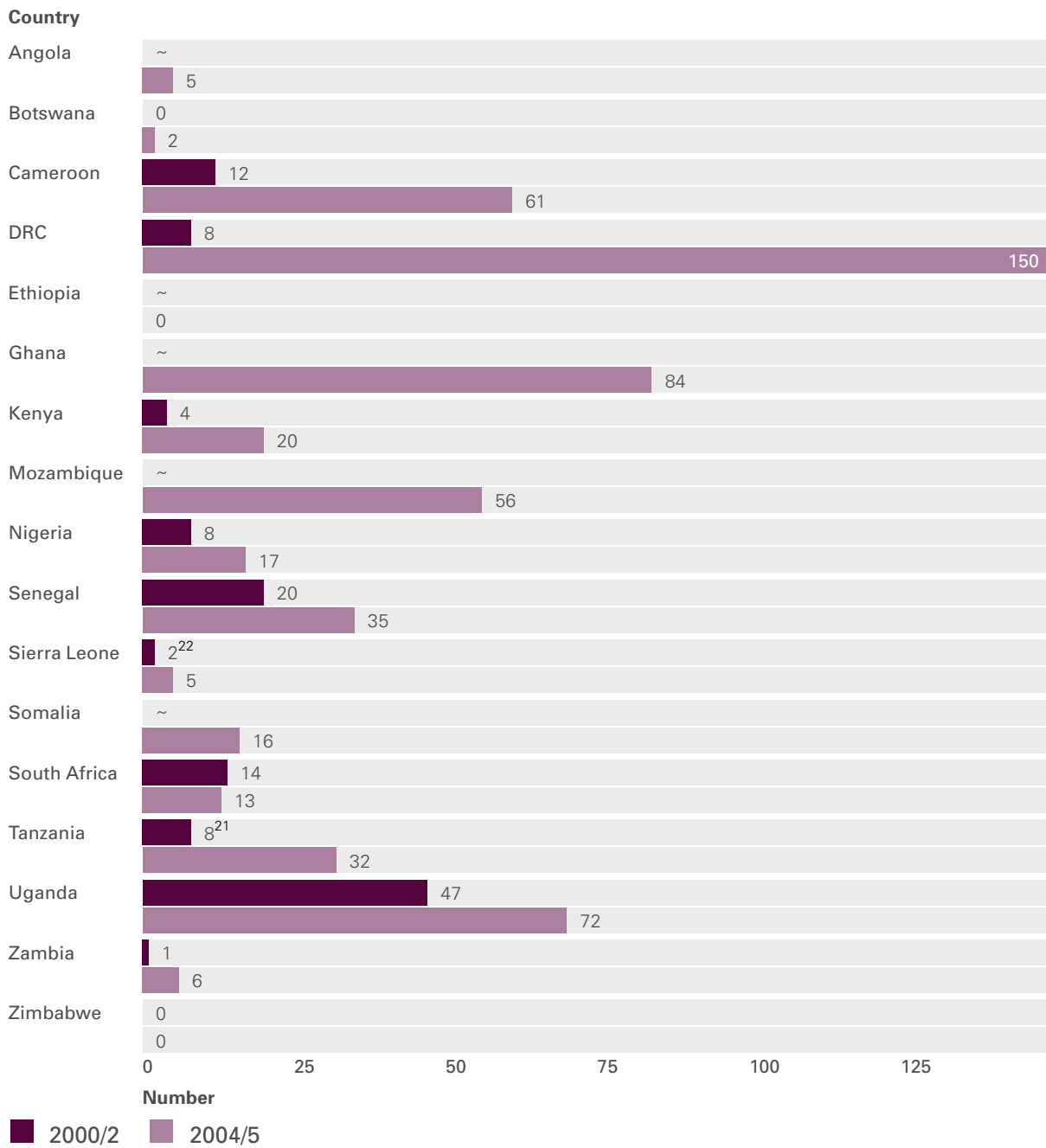
Sources for all other data are located in the individual AMDI Country Reports

State versus Commercial Radio

In most countries, national and regional state radio represent the voice of the government. State stations continue to dominate national radio. The number of national state radio stations has remained constant since 2000 with 15 of the 17 countries having at least one national state station. A notable exception is Sierra Leone which, in lieu of a national broadcaster, operates six state regional stations under the umbrella of a national broadcaster. Other findings:

- *National commercial radio broadcasters are the exception not the rule*, operating in only six countries (DRC, Kenya, Somalia, South Africa, Tanzania and Zambia). Notably, DRC, Kenya and Tanzania have experienced an increase in national commercial stations since 2000.
- *State radio is coming under increasing pressure from regional or local commercial radio*. This is mainly in urban areas, with the exceptions being Botswana, Ethiopia and Zimbabwe where state radio remains largely unchallenged.
- *Large increases in regional or local commercial radio have been seen in nine countries*. While DRC's dramatic increase from eight to 150 stations may be explained partially by elections, growth in the other countries is attributed to economic growth brought on by changes in government (eg, Senegal), a liberalising broadcast policy and investment.

Graph 1: Commercial Regional Radio Growth



~ Data not available

²¹ A 1999 report notes that there were eight major registered radio stations but only three provided coverage outside Dar es Salaam. No independent stations are allowed to cover the entire country. See Tripp (1999) "Political Reform in Tanzania: The Struggle for Associational Autonomy". Retrieved 7 September 2006, from <http://www.sx.ac.uk/ecpr/events/jointsessions/paperarchive/mannheim/w3/tripp.pdf>.

²² The figure of 18 combines 17 community radio stations (as licensed by the IMC) and UN Radio, that is scheduled to be handed over to the government.

Community Radio

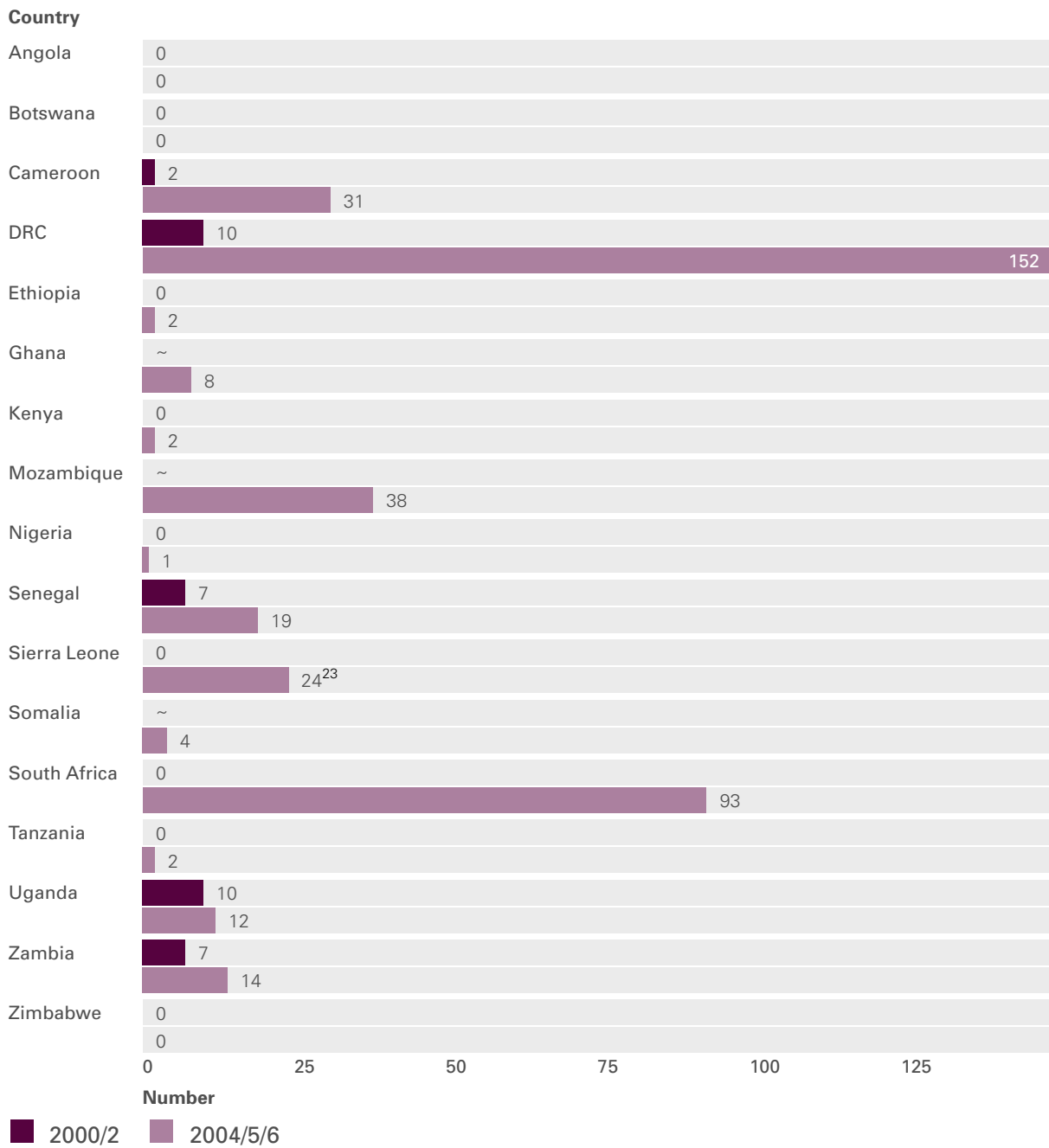
Community radio has become an important information and empowerment tool for local communities across the continent.

- ❑ The community radio sector in Africa generally is growing, with large increases in four countries (Cameroon, DRC, South Africa and Sierra Leone).
- ❑ Smaller increases are evident in Ethiopia, Kenya, Nigeria, Tanzania, Uganda, Zambia and Senegal (see Graph 2 and Table 5).
- ❑ Community radio was present in post-conflict environments (DRC, Sierra Leone, Uganda), although Angola does not have community radio stations.
- ❑ Data suggests that community radio is fuelled by state support (Mozambique, for example) and NGO activity; however, serious questions persist about the long-term sustainability of community radio stations.
- ❑ In Sierra Leone, stations with community radio licences are operating as commercial entities due to lack of donor funding.

Although this research is based on a clear definition of “community radio” (see glossary), interpretations vary from country to country. In Ghana, for example, the regulator, the National Communications Authority (NCA), appears to follow its own non-transparent definition, which is different to that given by the Community Radio Network. Such differences complicate data collection on community radio. According to the NCA, 35 community radio stations are on air while the network gives a figure of only four. Our researcher counted eight.

Community radio stations face numerous challenges, especially with regard to their sustainability. The long-term future of this sector is uncertain – despite its growth in many countries.

Graph 2: Community Radio Growth



~ Data not available

²³ The figure of 24 combines 7 religious stations (as licensed by the IMC) with 17 community radio stations (IMC – licensed) and two additional stations that will be launched by the end of 2006.

Sources to be found on Table: Radio Growth in Appendix

Table 5: Radio Growth

	Commercial National				Commercial Regional				State National				State Regional				Community			
	Number		Increase		Number		Increase		Number		Increase		Number		Increase		Number		Increase	
	2000	2004-6	#	%	2000	2004-6	#	%	2000	2004-6	#	%	2000	2004-6	#	%	2000	2004-6	#	%
Angola	0	0	0	0	~	5	N/A	N/A	1	1	0	0	18	18	0	0	0	0	0	0
Botswana	0	0	0	0	0	2	2	200	2	2	0	0	0	0	0	0	0	0	0	0
Cameroon	0	0	0	0	12	61	49	408	1	1	0	0	12	14	2	17	2	31	29	1450
DRC	1	6	5	500	8	150	142	1775	1	1	0	0	10	12	2	20	10	152	142	1420
Ethiopia	0	0	0	0	~	0	N/A	N/A	1	1	0	0	15	20	5	33	0	2	2	200
Ghana	0	0	0	0	~	84	N/A	N/A	1	1	0	0	~	11	N/A	N/A	~	8	N/A	N/A
Kenya	4	10	6	150	4	20	16	400	3	3	0	0	0	5	5	500	0	2	2	200
Mozambique	0 ²⁶	0 ²⁶	0 ²⁶	0 ²⁶	~	56	N/A	N/A	1	1	0	0	11	11	0	0	~	38	N/A	N/A
Nigeria	0	0	0	0	8	17	9	113	1	1	0	0	44	84	40	91	0	1	1	100
Senegal	0	0	0	0	20	35	15	75	2	2	0	0	12	15	3	25	7	19	12	63
Sierra Leone	0	0	0	0	2	5	3	150	0	0	0	0	6	6 ²⁴	0	0	0	24 ²³	24	2400
Somalia	1 ²⁵	1	0	0	~	16	N/A	N/A	0	0	0	0	~	1	N/A	N/A	~	4	N/A	N/A
South Africa	1	1	0	0	14	13	-1	-7	5	5	0	0	14	13	1	7	0	93	93	9300
Tanzania	0	2	2	200	8 ²¹	32	24	300	2	1	-1	-50	0	2	2	200	0	2	2	200
Uganda	0	0	0	0	47	72	25	53	2	2	0	0	0	0	0	0	10	12	2	20
Zambia	1	1	0	0	1	6	5	500	2	2	0	0	1	1	0	0	7	14	7	100
Zimbabwe	0	0	0	0	0	0	0	0	4	4	0	0	0	0	0	0	0	0	0	0

N/A Not applicable

~ Data not available

²¹ Source: A 1999 report notes that there were 8 major registered radio stations but only three provided coverage outside Dar es Salaam. No independent stations are allowed to cover the entire country. See Tripp (1999) "Political Reform in Tanzania: The Struggle for Associational Autonomy". Retrieved 7 September, 2006, from <http://www.sx.ac.uk/ecpr/events/jointsessions/paperarchive/mannheim/w3/tripp.pdf>

²³ The figure of 24 combines 7 religious stations (as licensed by the IMC) with 17 community radio stations (as licensed by the IMC) & two additional stations will be launched by the end of 2006

²⁴ Sierra Leone does not have the infrastructure for a truly national broadcaster. However, the SLBS has established six regional stations which operate under the SLBS banner but are not necessarily repeater stations

²⁵ Source: Research Manager, Research & Marketing Services (EA) Ltd Email communication, 11 September 2006 from the Somali Embassy in Nairobi

²⁶ Source: Radio (Mozambique), in EuropaWorld online. London, Routledge. British Broadcasting Corporation (BBC). Retrieved 12 September 2006 from <http://www.europaworld.com>

Sources for all other data are located in the individual AMDI Country Reports

Religion and the Media

In some countries, religious media may be the primary or sole area of non-state-sector media development since 2000. Countries such as DRC, Tanzania and Zambia have witnessed private broadcasting expansion largely due to the recent growth of religious broadcasting. Three religious radio stations in Kenya provide some of the most popular and listened-to programming. In Zambia, a number of local radio stations are run or influenced by the Roman Catholic Church, a force in other countries in this report. In Uganda, one-third of the television broadcasters are owned by religious entities and are broadcasting exclusively religious or family-friendly content. South Africa's Radio Pulpit is the only national radio broadcaster other than the public broadcaster SABC's channels. The DRC has witnessed an explosion in the growth of 'revival churches' and a parallel rise in religious broadcasting.

Radio dominates the media output of religious media, partly due to the lower economic and regulatory entry barriers for owners than those for newspapers or television. Moreover, the focus on radio allows owners to expand the broadcast spectrum beyond the urban areas, avoid the economic barriers to consumers posed by high-priced newspaper or TV subscriptions, and to address the high illiteracy rates in the population.

Hard power versus religious airwaves and print. In the countries surveyed, the ultimate power still lies with the state. In the case of Zambia, the focus of religious radio on opposition voices has led to operating licences being revoked. Zimbabwe and Angola maintain highly restrictive media environments with Zimbabwe broadcasting higher percentages of programming dedicated to religion than politics. Some broadcasters, such as Uganda’s Top TV, have made concerted efforts to ensure that their religious positions are not confused with political leanings.

The historical legacy of charities with religious affiliations has shaped some of the current media landscapes. It appears that the groundwork for the current role of religious broadcasting was established with the presence of foreign NGOs and has evolved and splintered to include charities, such as the Catholic Media Services Centre in Nigeria, that provide journalists with professional skills training. In Uganda, the influx of foreign church support has fostered a growing media platform for a single church that now owns radio and television broadcasting stations. However, the tough economic conditions for operating private broadcasters in these African nations demands a reliance by stations on subsidies from religious organisations in order to remain economically viable and independent from the state.

In some countries, religious programming or religious media appear to be tertiary to state or media priorities. In Ghana and Senegal, politics is the primary concern for the media, not religion. Other states, such as Somalia, have legislated that religion is a “private matter”, although religious programming does exist. In Botswana, religious programming makes up just 3% of content on state broadcast media.

Media as a counterweight to state leaders. Despite often tightly-controlled regulatory frameworks, religious media may also serve as counterpoints to and watchdogs of, elected officials and the political regime. In the case of Zambia, the country researcher noted that politicians do not seek exposure on TBN (Christian TV), largely because its agenda is not aligned with that of the political regime. As such, Zambian leaders fear TBN won’t provide an unchallenged portal for their views to be diffused to Zambian society. In the case of Angola, religious media reporters have tackled issues not covered by the state-owned media, with often harsh and unfortunate consequences for the journalists and their media outlet.

2.4 Television: Consumption and growth

In general, television ownership and viewership is positive (see Table 6 on p. 30). However, penetration in the countries surveyed is characterised by an enormous range – from 2% in Somalia and DRC to 76% in Mozambique. Seven out of the 12 countries where country-wide figures were available report that more than 50% of the population watch TV at least once a week, with Senegal (95.3%) and Mozambique (88.5%) leading the list. In five countries, less than half of the population watch television, with Uganda reporting the smallest audience (13.6%).

Growth in television broadcasting across the sub-Saharan continent is generally slow. Factors inhibiting growth include:

- ❑ high market entry costs;
- ❑ high equipment and running costs;
- ❑ liberalisation is slower than for radio;

- electricity supply is either not in place or is too unreliable to support a reliable television service;
- return on investment is considered to be small; and,
- a TV set is a costly piece of equipment for the majority of citizens to acquire.

Table 6: Television Ownership and Viewing

	Ownership			Access	TV – Watched Once a Week			TV – Watched Everyday		
	Percentage		Increase	Percentage	Percentage		Increase	Percentage		Increase
	National 1997-2003	National 2004-6	%	%	2000-3	2004-6	%	2000-3	2004-6	%
Angola	~	97 ²⁶	N/A	~	N/A	N/A	N/A	N/A	N/A	N/A
Botswana	15.4	15.2	-1	~	~	~	N/A	~	~	N/A
Cameroon	17.2	22.9	33	~	77.1 ²⁷ (Urban Only)	88.3 ²⁷ (Urban Only) 51.3 (Total 2002)	15 (Urban Only)	58.4 ²⁷ (Urban Only)	74.1 ²⁷ (Urban Only) 36.9 (Total-2002)	27 (Urban Only)
DRC	1.39	1.69	22	~	~	77.6 (2005 Kinshasa only)	N/A	~	~	N/A
Ethiopia	2	~	N/A	~	33	51	54.5	~	~	N/A
Ghana	21	46.9 ²⁷	123	79.5 ²⁷	54.5 ²⁷	61.2 ²⁷	12	33.7 ²⁷	38.0 ²⁷	13
Kenya	~	2717-32 ²⁹	88 ²⁹	77.3 ²⁷	42.2 ²⁷	46.6 ²⁷	10.0	25.8 ²⁷	28.1 ²⁷	9
Mozambique	~	75.7	N/A	92.6 ²⁷	~	88.5 ²⁷	N/A	~	72.7 ²⁷	N/A
Nigeria	50.8	53.1 ²⁷	5	74.5 ²⁷	40.8 ²⁷	52.3 ²⁷	2	34.8 ²⁷	33.4	4
Senegal ²⁰	~	78.9	N/A	95.3	~	95.3	N/A	~	71.5	N/A
Sierra Leone	³⁰ 4.2-6.7	~	60 ³⁰	~	~	~	N/A	~	~	N/A
Somalia	2 ²⁸	~	N/A	~	~	~	N/A	~	~	N/A
South Africa	66.5	72.1	8	71.7 ¹⁸	76.5	78	2	63.5	67.3	6
Tanzania	2 ²⁷	6 ²⁷	200	~	~	34 ²⁷	N/A	~	~	N/A
Uganda	4.5	6	N/A	22.2 ²⁷	14.3 ²⁷	13.8 ²⁷	-3	8 ²⁷	7.8	-3
Zambia	26	36.5	40	~	39.4 ²⁷	34.1 ²⁷	-13	30.2 ²⁷	22.5	-25
Zimbabwe	27.4	55	101	76.4 ²⁷	40 ²⁷	43.3 ²⁷	8.0	30.5 ²⁷	27.1	-11

~ Data not available

¹⁸ Source: Sue Scott, Nielsen Media South Africa. Email to BBC WST 4 September 2006

²⁰ Source: Placide Yaptie, Research and Marketing Services-Senegal. Personal communication (email) with BBC WST on 6 September 2006

²⁵ Source: Research Manager, Research & Marketing Services (EA) Ltd. Personal communication (email) with BBC WST 11 September 2006

²⁶ Source: British Council telephone conversation with BBC WST, 6 September 2006

²⁷ Source: InterMedia Reports held at BBC WST, London. Viewership estimates based on "When TV viewed last"

²⁸ Source: Television (Somalia) in EuropaWorld online. London, Routledge. British Broadcasting Corporation (BBC). Retrieved 12 September 2006 from <http://www.europaworld.com>

²⁹ The increase in television ownership period represents time period 2004 to 2005

³⁰ The increase in television ownership period represents time period 2000 to 2002

Sources for all other data are located in the individual AMDI Country Reports

State and Commercial Television

All countries, with the exception of Somalia, are dominated by national state terrestrial TV channels. Of these 16 countries dominated by state terrestrial, half also have regional outlets and some offer more than two state-run channels: Kenya (three) and South Africa (three). However, the provision of satellite services appears to be causing an influx of foreign channels (Kenya, Senegal, Somalia, South Africa). Other findings:

- Regionally, the only real growth has been in the commercial regional television sector – state television is almost static. An important exception is Nigeria, which has experienced an increase in state regional television from 58 to 130 channels over the past five years (See Table 7 on p. 34).

- In South Africa, the South African Broadcasting Corporation is being called upon to launch two new regional, vernacular-language, public service channels (the channel rollout is uncertain, due to lack of government funding). eTV (South Africa's commercial terrestrial broadcaster) is increasing its share of the audience and is active in the international programme acquisitions market.

Growth in commercial television is less dramatic than commercial growth in the radio sector. But there are some notable exceptions (see Table 7). Specific findings:

- DRC: commercial regional television has risen from 40 to 62 channels in the past five years;
- Mozambique: commercial regional television has started in the past five years and there are now 20 channels. More interesting is that Mozambique is the only country in this study to report community-run regional television launched in the past five years and is now offering 14 channels;
- Uganda: commercial regional television has grown from one channel in 2000 to eight in the past five years;
- Cameroon: commercial national and regional television have started in the past five years (three national channels and two regional channels).

Table 7: Television Growth

	Commercial National				Commercial Regional				State National				State Regional				Community			
	Number		Increase		Number		Increase		Number		Increase		Number		Increase		Number		Increase	
	2000	2004-6	#	%	2000	2004-6	#	%	2000	2004-6	#	%	2000	2004-6	#	%	2000	2004-6	#	%
Angola	0	0	0	0	0	0	0	0	1	0	0	0	18	18	0	0	0	0	0	0
Botswana	0	0	0	0	1	1	0	0	1	1	0	0	1	1	0	0	0	0	0	0
Cameroon	0	3	3	300	0	2	2	200	1	1	0	0	0	0	0	0	0	0	0	0
DRC	2	2	0	0	40	62	22	55	1	1	0	0	10	10	0	0	0	0	0	0
Ethiopia	0 ³²	0 ³²	0	0	0 ³²	0 ³²	0	0	1	1	0	0	1	1	0	0	0	0	0	0
Ghana	2	2	0	0	26	26	0	0	1	1	0	0	1	1	0	0	0	0	0	0
Kenya	4	5	1	25	0	0	0	0	3	3	0	0	0	0	0	0	0	0	0	0
Mozambique	0	0	0	0	0	20	20	2000	1	1	0	0	4	4	0	0	0	14	14	1400
Nigeria	0	0	0	0	10	14	4	40	1	1	0	0	58	130	72	124	0	0	0	0
Senegal	0	0	0	0	0	1	1	100	1	1	0	0	0	0	0	0	0	0	0	0
Sierra Leone	0 ²	0 ²	0	0	0	1	1	100	0	0	0	0	1	1	0	0	0	0	0	0
Somalia	0	0	0	0	1	6	5	500	0	0	0	0	1	1	0	0	0	0	0	0
South Africa	3	3	0	0	0	0	0	0	3	3	0	0	0	0	0	0	0	0	0	0
Tanzania	0 ³¹	6	6	600	7	9	2	29	1 ³²	1 ³²	0	0	~	1	N/A	N/A	0	0	0	0
Uganda	1	1	0	0	1	8	7	700	1	1	0	0	0	0	0	0	2	2	0	0
Zambia	0	0	0	0	1	2	1	100	1	1	0	0	0	0	0	0	0	0	0	0
Zimbabwe	0	0	0	0	0	0	0	0	2	1	-1	-50	0	0	0	0	0	0	0	0

~ Data not available

³¹ Source: Fila Karashani, The Media Council of Tanzania. Email to BBC WST 2 September 2006

³² Source: Television (Country Name) in EuropaWorld online. London, Routledge. Retrieved 12 September 2006 from <http://www.europaworld.com>

Sources for all other data are located in the individual AMDI Country Reports

2.5 Newspapers: consumption and growth

All nations surveyed in this report contain newspapers with varying degrees of distribution, content and consumption. Some of the findings include:

- In general, newspapers offer some diversity of opinion and coverage (eg, women's issues), with tabloids and their "softer news" and features (eg, *The Sun* in Nigeria) proving increasingly popular;
- Many of the main titles are published in the official European-originated languages but growing numbers of papers are published in vernacular; and,
- There is evidence that some governments seek to stifle the growth of private newspapers, such as in Zimbabwe, through excessive pricing, paper supply manipulation and prohibitive taxes on printing presses.

In general, newspapers within the 17 countries are often urban-centric and targeted at people with high levels of literacy, opinion formers and the middle classes. However *there is a trend towards 'tabloid' style or 'people's' newspapers in some countries* (for example, Botswana, Nigeria, Senegal, South Africa), that offer an alternative to the highbrow newspaper that traditionally speaks to the educated elite. While these may be creating a new audience of people who haven't read before, they are regarded as low-quality products which could possibly compromise professional standards.

Readership levels can be broken into two distinct categories – five of the 17 countries did not have newspaper readership data available (see Table 8). Categories include:

- High levels of readership (33%+ read a newspaper once week):
Mozambique (47%), South Africa (41%), Nigeria (39%), Zambia (37%) and Cameroon (33%).
- Lower levels of newspaper readership (<33% read a newspaper once a week):
Zimbabwe (32%), Tanzania (31%), Uganda and Ghana (24%), Botswana (13%), Senegal (6%), and Kenya (5%).

Table 8: Newspaper Readership

	Read Once a Week			Read in Last 7 Days			Read Everyday			Read Yesterday		
	Percentage		Increase	Percentage		Increase	Percentage		Increase	Percentage		Increase
	2000-3	2004-6	%	2000-3	2004-6	%	2000-3	2004-6	%	2000-3	2004-6	%
Angola	~	~	N/A	~	~	N/A	~	~	N/A	~	~	N/A
Botswana	13.10	~	N/A	~	~	N/A	23.3	~	N/A	~	~	N/A
Cameroon	~	33 ¹⁹	N/A	17.5 ¹⁹	~	N/A	~	~	N/A	5.7	~	N/A
DRC	~	~	N/A	~	~	N/A	~	~	N/A	~	~	N/A
Ethiopia	~	~	N/A	~	~	N/A	~	~	N/A	~	~	N/A
Ghana	24 ¹⁹	~	N/A	24.2 ¹⁹	19.6 ¹⁹	-19	~	~	N/A	12.9 ¹⁹	~	N/A
Kenya	4.63	4.61	-0.40	56.5 ¹⁹	36.3 ¹⁹	-36	3.7	7.6	105.4	19.7 ¹⁹	~	N/A
Mozambique	~	47 ¹⁹	N/A	~	47 ¹⁹	N/A	~	~	N/A	~	~	N/A
Nigeria	~	38.5	N/A	18.6 ¹⁹	22.8 ¹⁹	23	~	~	N/A	8.3 ¹⁹	~	N/A
Senegal ²⁰	~	6.2	N/A	~	~	N/A	~	11.3	N/A	~	~	N/A
Sierra Leone	~	~	N/A	~	~	N/A	~	~	N/A	~	~	N/A
Somalia	~	~	N/A	~	~	N/A	~	~	N/A	~	~	N/A
South Africa ³³	40.4	40.6	0.5	32.4 ⁴	30.5 ⁴	-5.9	~	~	N/A	19.9 ⁴	22.7 ⁴	36.7
Tanzania	~	31	N/A	35 ⁵	33.3 ⁵	-5	~	~	N/A	20.6	~	N/A
Uganda	24 ¹⁹	~	N/A	23.7 ¹⁹	31.3 ¹⁹	32	~	~	N/A	9.3 ¹⁹	~	N/A
Zambia	34.1	37.1	9	18.3 ¹⁹	19.2 ¹⁹	5	~	4.20	N/A	8.3 ¹⁹	5.8 ¹⁹	-30
Zimbabwe	35	32	-9	35.2 ¹⁹	33.9 ¹⁹	-4	13	~	N/A	15.7 ¹⁹	~	N/A

N/A Not applicable

~ Data not available

¹⁸ Source: Sue Scott, Nielsen Media South Africa. Email to BBC WST on 4 September 2006

¹⁹ Source: InterMedia Reports held at BBC WST, London

²⁰ Source: Placide Yaptie, Research and Marketing Services-Senegal. Email to BBC WST on 6 September 2006

³³ Source: South African data provided by Nielsen Media Research includes the following data collection parameters:
 • Newspaper – % adult population read an average issue of any weekly newspaper (read for the first time within past 7 days)
 • Newspaper – % adult population read an average issue of any daily newspaper (read for the first time “yesterday”)

Sources for all other data are located in the individual AMDI Country Reports

Newspaper growth

Since 2000, changes in the newspaper market across the countries surveyed have been inconsistent. The newspaper environment in some countries has remained static, others are growing whilst markets are in decline. The commercial advertising market is reportedly underdeveloped in most countries, so titles are heavily reliant on a blend of private and government advertising and financial support.

- National newspapers, dailies and weeklies, dominate the market in all countries with the exception of Somalia (see Table 9).
- The structure of the newspaper marketplace varies considerably from country to country but can be generally classified in the following categories:

Growing markets: Robust economies, favourable media legislation and government policies are factors in spurring newspaper growth. They include Botswana, South Africa, Senegal, Kenya (especially magazines), Mozambique, Cameroon and Ethiopia (significant increase in national weeklies, but some evidence of titles being short-lived).

Static markets: Due to a host of factors, from government policy to historically stressed markets, some of the countries did not experience any newspaper growth in the past five years. They include Ghana, Sierra Leone, Uganda and Zambia.

Declining markets: Strong government stances on media content and ownership, as well as unfavourable conditions for owners and journalists, and sometimes outright banning of newspapers, impedes newspaper growth. Some of the countries with eroding

newspaper markets include DRC (many titles opened briefly then closed), Nigeria, Somalia and Zimbabwe.

Table 9: Newspaper Growth

	National Daily				National Weekly				Regional Daily				Regional Weekly			
	Number		Increase		Number		Increase		Number		Increase		Number		Increase	
	2000	2004-6	#	%	2000	2004-6	#	%	2000	2004-6	#	%	2000	2004-6	#	%
Angola	1	~	N/A	N/A	~	6	N/A	N/A	0	0	0	0	~	2	N/A	N/A
Botswana	1	2	1	100	5	10	5	100	0	0	0	0	1	1	0	0
Cameroon	1 ³⁹	4 ³⁹	3	300	0 ³⁹	5 ³⁹	5	500	0 ³⁹	0 ³⁹	0	0	0 ³⁹	0 ³⁹	0	0
DRC	11	11	0	0	~	0	N/A	N/A	~	0	N/A	N/A	446	146	-300	-67
Ethiopia ³⁴	~	3	N/A	N/A	~	26	N/A	N/A	~	0	N/A	N/A	~	26	N/A	N/A
Ghana ³⁵	11	11	0	0	67	67	0	0	23	23	0	0	5	5	0	0
Kenya	5	5	0	0	5	9	4	80	~	0	N/A	N/A	~	0	N/A	N/A
Mozambique	2	2	0	0	3	7	4	133	0	0	0	0	0	0	0	0
Nigeria	16	20	4	25	28	23	-5	-18	9	10	1	11	26	19	-7	-27
Senegal	15	26	11	73	18	26	8	44	0	0	0	0	5	4	-1	-20
Sierra Leone	5	5	0	0	5	7	2	40	11 ⁴⁰	40 ⁴⁰	29	263	11 ⁴⁰	40 ⁴⁰	29	263
Somalia	0	0	0	0	0	0	0	0	55	31 ³⁶	-24	-43	5	5	0	0
South Africa	1	2	1	100	6	7	1	17	12	14	2	17	14	18	4	29
Tanzania	4	15	11	275 ³⁷	14	17	3	21	0	0	0	0	1	2	1	100
Uganda	4 ³⁸	4 ³⁸	0	0	~	7 ³⁸	N/A	N/A	0	0	0	0	~	0	N/A	N/A
Zambia	3	3	0	0	4	4	0	0	0	0	0	0	2	2	0	0
Zimbabwe	4	3	-1	-25	7	6	-1	-14	0	0	0	0	10	6	-4	-40

N/A Not applicable

~ Data not available

³⁴ Source: The Ethiopia country report (see Section 7.1) indicates 56 total newspapers (national and regional). Source: Ministry of Information, personal communication, August 2006

³⁵ Source: Statistics for Ghana newspaper growth in the country report indicate that there are 23 biweeklies and 2 regional newspapers

³⁶ Source: Puntland and South Somali newspapers assumed to be dailies as per email correspondence with Country Researcher

³⁷ Source: Raphael Hokororo, National Department of Information Services (MAELEZO). Email to BBC WST London on 6 September 2006

³⁸ Source: Newspaper (Country Name), in EuropaWorld online. London, Routledge. British Broadcasting Corporation (BBC). Retrieved 12 September 2006 from <http://www.europaworld.com>

³⁹ Source: Ministry of Communication, Cameroon telephone conversation with BBC WST on 6 September 2006

⁴⁰ No information that bifurcates daily and weekly newspapers was located. Additionally, the uncertain publishing schedules of many newspapers in Sierra Leone mean that there are typically 25 newspapers being published at one time. See Figure 5 and 7.1.3. of Sierra Leone Country Report

Sources for all other data are located in the individual AMDI Country Reports

2.6 Journalism profession

Despite the seemingly large number and significant growth in the number of journalists, many country researchers identified an increase in the number of untrained and unqualified individuals working as “journalists”.

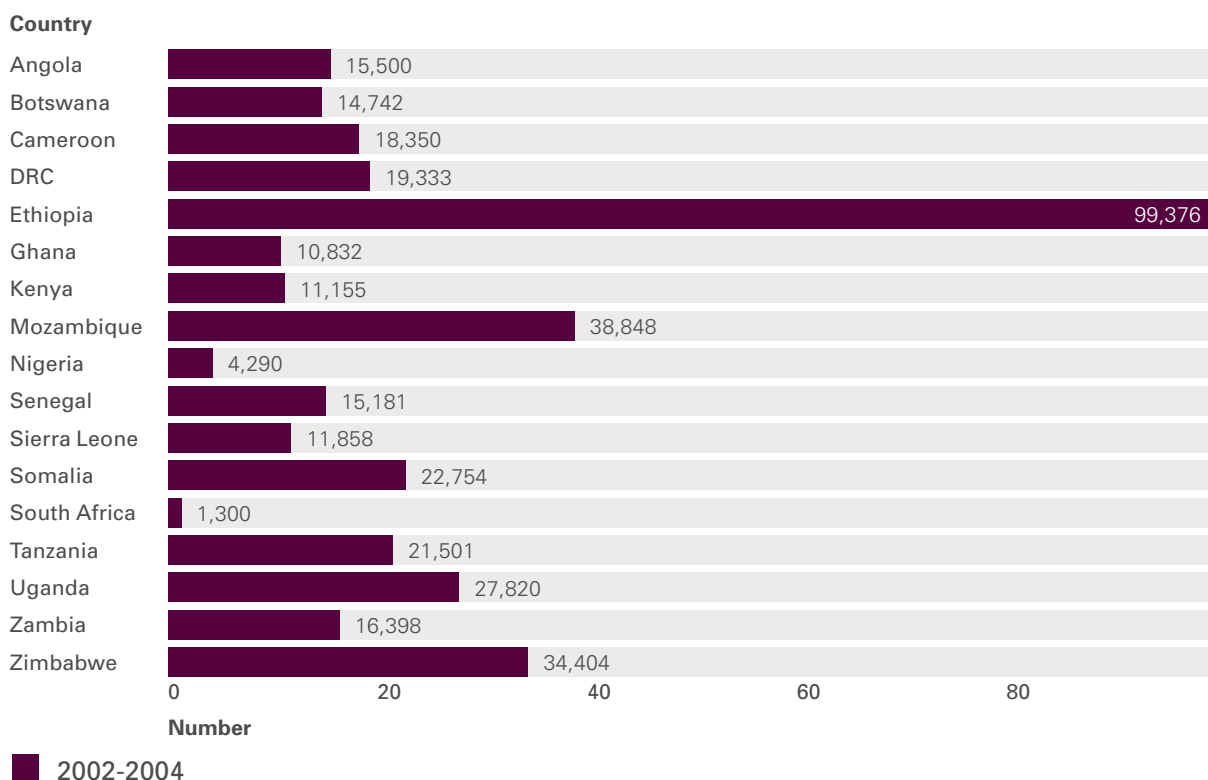
- DRC, Kenya, Nigeria, Senegal, Sierra Leone, and Uganda had an increase of 50% or greater in the reported number of practising journalists over the five-year period studied. More dramatically, the number of journalists in Nigeria and DRC increased by 100% and 113% respectively.
- While it is extremely difficult to estimate the number of untrained persons who work in an informal or freelance capacity as journalists, the rise of amateur journalists has undermined the rise of trained journalists in many of the countries studied.
- Despite regional similarities in the status of the journalism profession, there are also significant differences. Countries can be organised in three clusters by the estimated number of journalists per habitant. They include:

Dense (1-15,000): South Africa had the most dense population per journalists with one journalist for every 1,300 citizens. With the exception of Nigeria, the other dense countries were in excess of 10,000 citizens per journalist.

Medium (15-30,000): Comprising almost half of the countries surveyed, these medium density countries clustered around that of Cameroon (18,350) with Uganda (27,820) at the upper end of the category.

Sparse (30,000+): Less than 20% of the surveyed countries, these countries ranged from those slightly in excess of 30,000 (Zimbabwe, Mozambique) to Ethiopia's marked distance from others with only one journalist for every 99,000 habitants.

Graph 3: Ratio of Population per Journalist



Sources to be found on Table 10

Compulsory registration

In most countries surveyed there are no requirements imposed by governments for compulsory registration of journalists. Nigeria, Uganda and Zimbabwe have introduced this kind of registration (see Table 10) to varying degrees of impact. In Cameroon, journalists are expected to register with the government and obtain a press card if they want to cover government activities. Without such registration they are not allowed to do so.

The requirement for journalists to possess a compulsory licence or affiliate to a professional association exists in Ghana, Uganda and Zimbabwe.

Professional affiliation

Professional affiliation, ie voluntary membership in a professional organisation or trade union, seemingly reflects a positive working environment for media practitioners. In all countries journalists are organized in professional associations.

Whilst the other pressures at work on journalists, such as pay and restrictions on freedom of expression, voluntary memberships were an option for journalists in many of the surveyed countries. However, the deeper issue proves to be the sustainability of such organisations as well as their level of power within the often dominant government structures that overarched their daily affairs.

- There are no journalist trades unions in: Botswana, Tanzania or South Africa (dissolved 2005). Reasons for the lack of unions in these countries – including South Africa with the most journalists as a percentage of population – vary. In general, the inability of journalist unions to organize collectively and remain sustainable is a growing concern given the overall health of these media landscapes (see Table 10 and Table 11).

Table 10: Journalist Per Habitant, Compulsory Registration and Professional Affiliation

	Ratio of Population Per Journalist (1 Journalist Every x Habitants) ⁴¹	Journalists Current/Most Recent Number	Compulsory Government Registration?	Compulsory Licence?	Compulsory Affiliation to Professional Association?
Angola	15,500	1,000	NO	NO	NO
Botswana	14,742	120 (2005)	NO	NO	NO
Cameroon	18,350	874 (2005)	YES	NO	NO
DRC	19,333	2,889 (2004)	NO	NO	NO
Ethiopia	99,376	704 (2004)	NO	NO	NO
Ghana	10,832	2,000+ (2006)	NO	NO	YES
Kenya	11,155	3,000 (2006)	NO	NO	NO
Mozambique	38,848	500 (2000)	NO	NO	NO
Nigeria	4,290	2,000-3,000 (2000-6)	YES	NO	NO
Senegal	15,181	750 (2005)	NO	NO	NO
Sierra Leone	11,858	450 (2006)	NO	NO	NO
Somalia	22,754	350 (2005)	NO	NO	NO
South Africa	1,300 ⁸	35,000	NO	NO	NO
Tanzania	21,501	1500/2000 (2005)	NO	NO	NO
Uganda	27,820	1,000 (2006)	YES	YES	YES
Zambia	16,398	700 (1999)	NO	NO	NO
Zimbabwe	34,404	376 (2005)	YES ⁴³	YES	YES

⁴¹ Data calculated by dividing the number of journalist in column 2 and the population for the same year (when possible)

⁴² Source: Personal communication (email) with representative of Institute of African Journalists and BBC WST, 8 September 2006

⁴³ For more information on the Access to Information and Protection of Privacy Act (AIPPA 2002), see Section 3.1, p. 9

Sources for all other data are located in the individual AMDI Country Reports

Table 11: Journalism – Professional Affiliation

	Trade Unions
Angola ¹	<ul style="list-style-type: none"> Accurate numbers of journalists are difficult to verify and only those registered with the two journalists' trade unions are available: the government's Union de Journalistas (2,100 members) and the independent Syndicat de Journalistas (1,700 members). However, many registered within these unions are not, strictly speaking, journalists and many are technical staff within a journalist organisation, as there are no specific unions to support these workers within the country. A more accurate interpretation is approximately 1,000 actual journalists based within the whole of Angola, with around 500 based within the capital.
Botswana	<ul style="list-style-type: none"> There are currently no active journalist unions in Botswana as the Botswana Journalists Association is no longer in operation⁴⁴.
Cameroon	<ul style="list-style-type: none"> Journalists are expected to register with the government, and a press card system for registered journalists is in place. Only journalists with press cards may access and cover state run public events. To obtain a card journalists must prove they belong to a legal media organisation. As journalists are not required to belong to a professional association, data on the number of journalists who are registered with trade unions is patchy. A number of professional journalists' associations exist but there is no single forum that brings the associations together.
DRC	<ul style="list-style-type: none"> The DRC has experienced a dramatic rise in the number of journalists due to pluralisation of media. A high reliance on freelancers equates to little power for workers. There is at least one active journalist union – Union Nationale de la Presse du Congo (UNPC)⁴⁵.
Ethiopia	<ul style="list-style-type: none"> Ethiopia has at least two unions, one government (Ethiopian Journalists Association) and one independent (Ethiopian Free Press Journalist Association – EFJA). The EFJA has had a rollercoaster existence. Founded in 1993, registered in 2000, banned by the government in 2003, it was suspended for 13 months for not renewing its annual license. In 2005, it was recognised as a journalist association⁴⁶. NGOs continue to reports sanctions of EFJA members.
Ghana	<ul style="list-style-type: none"> Media workers are unionized based on their workplace or their profession and not necessarily organized around media. There is at least 1 independent journalist union: Ghana Journalists' Association (GJA).
Kenya	<ul style="list-style-type: none"> Journalists currently have the option to register with the government but without a regulatory framework, few if any journalists bother to do so. However, the government has legislation planned to enforce the registration of all journalists. Most journalists are not affiliated with professional associations. The Kenya Union of Journalists has membership of 200 journalists. Additional associations such as those for women journalists also exist. The Media Council of Kenya is currently conducting baseline research towards a database of all journalists.
Mozambique	<ul style="list-style-type: none"> There is at least one journalist union: Mozambican Journalists Union (SNJ) which is affiliated with the Mozambican Workers Organisation (OTM), the main congress of trade unions.
Nigeria	<ul style="list-style-type: none"> Journalists are required to be registered with the Nigeria Union of Journalists which serves as a dual oversight body and as a trade union. The NUJ boasts a 50-year heritage, 36 state councils and reports 25,000 members⁴⁷.
Senegal	<ul style="list-style-type: none"> 500 journalists are unionised. The largest union, founded in 1984, is the Syndicat des Professionnels de l'Information et de la Communication du Sénégal (SYNPICS). Increasingly, journalists are bypassing unions and taking their cases of alleged abuse by employers directly to courtrooms.
Sierra Leone	<ul style="list-style-type: none"> There are three independent journalist unions. The Sierra Leone Association of Journalists is the primary player, boasting 240 members. Also active are two associations specifically for female journalists.
Somalia	<ul style="list-style-type: none"> The National Union of Somali Journalists (NUSOJ) is the new name for the Somali Journalists Network (SOJON), created in 2002. Established as a media NGO, it is registered as a trade union and has six branches⁴⁸. In Somaliland, foreign journalists require clearance from the government, but local journalists do not need to register. In Puntland, journalists do not register with the government. There are journalist trade unions, but journalists are not required to be a member of a trade union.
South Africa	<ul style="list-style-type: none"> There are currently no active journalist unions as the South African Union of Journalists liquidated in 2005 but had been leaderless since 2003. Members then joined the Media Workers' Association (MWASA). Its 35,000 members includes journalists. Discussions are underway to re-establish a media workers union⁴⁹.
Tanzania	<ul style="list-style-type: none"> Journalist unions in Tanzania emerge and then die again. The Association for Journalists and Media Workers (AJM) was recently formed while other organisations do exist but were reported as dormant or not very vibrant. The past three years have seen a dramatic rise in press clubs which act as professional journalist associations – there are 23 across the country. Professional associations for journalists working in specific areas such as HIV/AIDS also exist on a national level. The Press and Journalists Act 1995 states that journalists must register with the government, be licensed, and affiliate themselves with a professional association.
Uganda	<ul style="list-style-type: none"> There are two journalist unions/associations in Uganda. One, the National Institute of Journalists of Uganda (NIJU), is a government-created and run body while the Ugandan Journalist Association (UJA) is an independent body.
Zambia	<ul style="list-style-type: none"> Journalists are free to affiliate with unions and a number of organisations exist. Approximately 200 journalists are unionised as trade unionism is mostly confined to state-owned media. Freelance journalists, and those working for privately-owned media companies, are not as organised.
Zimbabwe	<ul style="list-style-type: none"> Journalists are legally bound to register with the government and face two years in prison if they fail to do so. However, some journalists work clandestinely to avoid the strict accreditation requirements. Many also work using false names for foreign media organisations that are banned in Zimbabwe. Zimbabwe has at least two journalist unions: Independent Journalists Association of Zimbabwe and the Zimbabwe Union of Journalists (ZUJ). The ZUJ is working towards establishing a National Employment Council to examine the working conditions of journalists, with the aim of at least standardising salaries and perks. There has been a decline in the number of practising journalists due to the closure of media houses.

⁴⁴ Source: Media Barometer Botswana Report (2005) by Methaetsile Leepile and Sechele Sechele. Presented at the Media Barometer Panel Workshop, Lobatse, 18-19 June 2005. Confirmed through BBC WST personal conversation with MISA-Botswana, 7 September 2006

⁴⁵ Source: Human Rights Watch, "Silencing Dissent". Retrieved 11 September, 2006 from <http://hrw.org/backgrounder/africa/drc1205/5.htm>

⁴⁶ Source: IPI. Retrieved by BBC WST on 7 September 2006 from http://www.freemedia.at/cms/pi/freedom_detail.html?country=KW0001/KW0006/KW0155/

⁴⁷ Source: Nigerian Union of Journalists (Lagos Council). Retrieved by BBC WST on 8 September 2006 from <http://www.lagosnuj.com/history.html>

⁴⁸ Source: National Union of Somali Journalists (NUSOJ). Retrieved by BBC WST on 8 September 2006, from <http://www.nusoj.org/>

⁴⁹ Source: Personal communication (email) with representative of Institute of African Journalists and BBC WST, 8 September 2006

Sources for all other data are located in the individual AMDI Country Reports

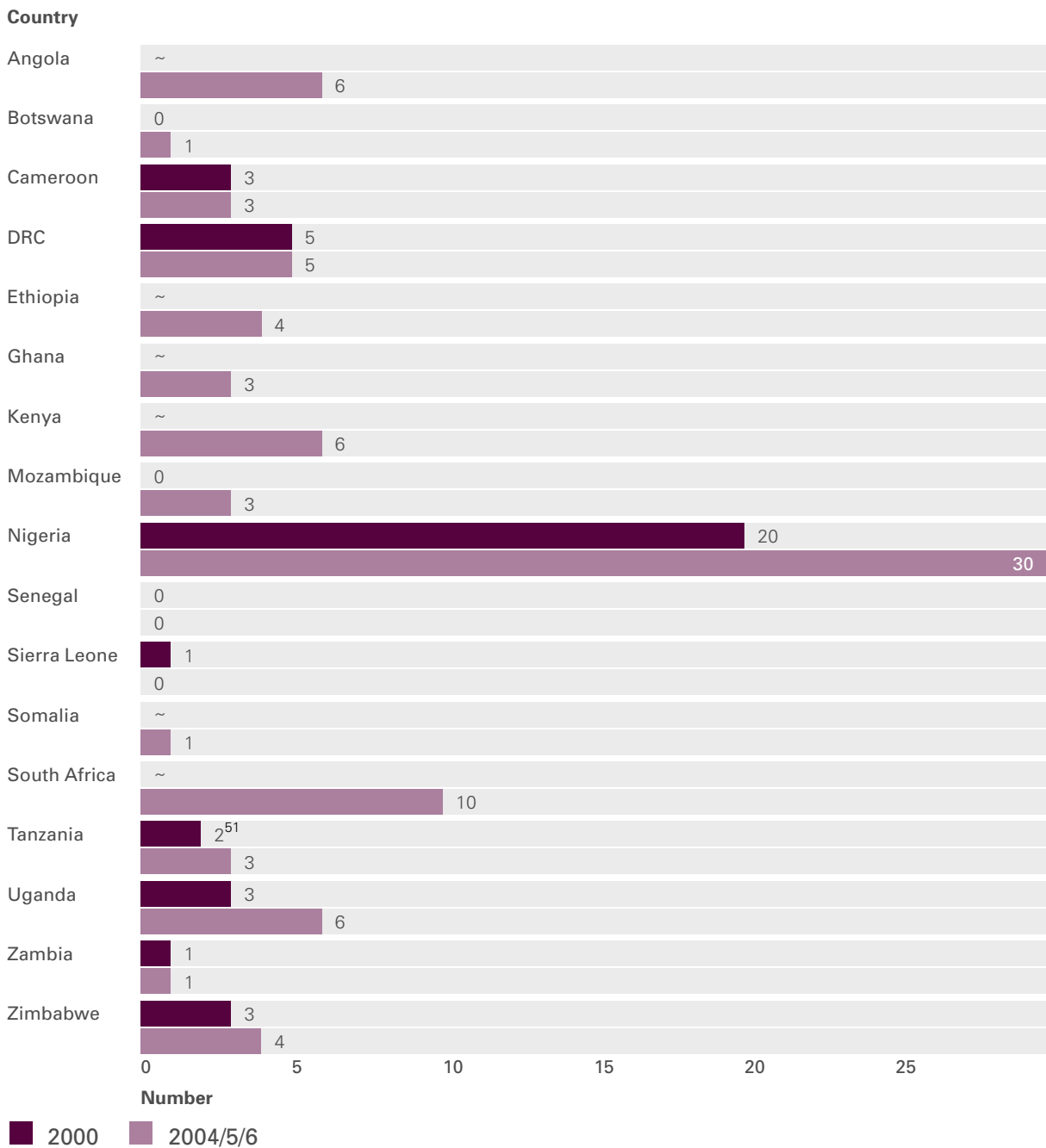
Professional development⁵⁰

Overall, there has been a marginal increase in the number of media/journalism training entities. There remain large question marks over the quality of much of the university training entities in the media and journalism fields, with much of the training considered to be lacking in both the theoretical and ethical aspects of journalism and – additionally and importantly – not being sufficiently practical in nature to equip graduates with the skills they need to work as practising journalists.

Universities

- The data shows a marginal increase in the number of university media/journalism training across many of the countries surveyed. Significantly, since 2000, Botswana and Mozambique have both established university-based training where previously it did not exist;
- Senegal is the only country not to have a university-based journalism course within the five-year period;
- The only university-based journalism course in Sierra Leone has closed; and,
- Nigeria had the highest number of university training entities, reporting an increase from 20 to 30 institutions in the past five years (a 50% increase).

Graph 4: Journalism Professional Development – Universities



Vocational institutes

- For the purposes of this research, vocational institutes were defined as institutions offering formal media and journalism training courses, apart from university departments.
- Nigeria and Zimbabwe have the most vocational training entities with four each, while all other countries reported fewer than four, with none reported in Kenya and Somalia.
- Vocational training appears stagnant, with the number of institutes remaining stable in five countries and declining in both Zambia and Zimbabwe. However, two countries (Botswana and Senegal) did report an institutional increase (each by one) over the past five years.

Other professional development activity

Organisation-based training is usually implemented by NGOs and media support agencies and may be an integral component of their organisational priorities (see Table 12). Most countries report some activity in the area of organisation-based training with limited increases in this activity over the past five years.

Kenya reported the highest level of organisation-based training initiatives (23), followed by Nigeria (17) and South Africa (nine). Those countries reporting the existence of between four and six organisation-based initiatives were DRC, Tanzania and Zambia.

Table 12: Journalism – Professional Development

	Universities		Vocational		Organisations	
	Number		Number		Number	
	2000	2004-6	2000	2004-6	2000	2004-6
Angola	~	6	~	2	~	1
Botswana	0	1	0	1	0	0
Cameroon	3	3	1	1	2	3
DRC	5	5	2	2	4	5
Ethiopia	~	4	~	3	~	3
Ghana	~	3	~	~	~	1
Kenya	~	6	~	0	15	23
Mozambique	0	3	1	1	0	0
Nigeria	20	30	4	4	17	17
Senegal	0	0	2	3	0	3
Sierra Leone	1	~	~	2	~	2
Somalia	~	1	~	0	~	1
South Africa	~	10	~	2	~	9
Tanzania	2 ⁵¹	3	~	~	4	6
Uganda	3	6	3	3	~	3
Zambia	1	1	5	3	4	4
Zimbabwe	3	4	5	4	1	0

~ Data not available

⁵¹ Source: John Bwire, Secretary of Media Council Tanzania and Secretary Commonwealth Press Union. Communication with BBC WST on 5 September 2006

Sources for all other data are located in the individual AMDI Country Reports

Journalist Salaries

Low pay for African journalists

Journalist pay varies across both media (TV, radio and print) and sector (state, private). Typically, journalists working for state media, such as those in Cameroon, are paid better than those working for private media. Across the countries surveyed, journalist salaries often under-performed against salaries in other professions. Accordingly, consensus across most countries was that journalists are poorly paid. While there were a few notable exceptions, such as top radio stations in Ghana paying very high sums, these were not the rule.

Freelancers are at risk

At least four country reports (DRC, Kenya, Senegal, Tanzania) explicitly mention that freelance media workers are in a vulnerable position; it is highly likely that the same situation exists across all the countries surveyed. With these workers having no contracts, employers can choose to ignore employment laws and freelancers have little recourse. Freelancing is also particularly precarious as the journalist does not have a guaranteed income. In Tanzania, it was reported that up to 80% of all journalists were non-permanent employees.

“Coupagne” is common practice

Journalist working conditions were described as poor and unfavourable across a number of countries, particularly in repressive environments such as Zimbabwe. Senegal noted that it was common practice for media outlets to “ferociously exploit” neophyte journalists. The combination of lack of resources and low pay was commonly described as leading to “brown envelope” journalism – described as the practice of “coupagne” in the DRC. Six countries explicitly cited this practice of receiving cash for stories as plaguing journalism (Cameroon, DRC, Nigeria, Sierra Leone, Tanzania, Zimbabwe). While the practice was recognised as detrimental, it was viewed as common, expected and unavoidable to counter poor pay.

The discrepancy in pay was most evident with print journalists, whose salaries tended to be much lower than those working in radio or TV. Nigeria reported that it was not uncommon for print journalists to go unpaid for months.

For more information, see the country reports and Appendix C.

2.7 Telephony and the Internet

The following section provides a brief overview of statistics on access to and uptake of telephony and the Internet. While the number of people who use the Internet has grown across all countries, the real story in new media growth is mobile telephony.

Between 2000 and 2005 there was little growth in access to fixed-line telephones, with seven countries experiencing negative growth. The clear exception to the rule was Somalia. Mobile telephony, on the other hand, experienced tremendous growth across all sub-Saharan countries surveyed, with 10 countries having compound annual growth rates of 85% or higher. Three exceptions were Botswana and South Africa, that already had comparatively high penetration rates, and Zimbabwe, which is in economic decline.

Table 13 illustrates the degree to which mobile telephony and Internet access increased between 2000 and 2005. However, Table 15 of this section outlines the caution needed with interpreting growth in information and communication technologies (ICTs), as the reach of mobile telephony and particularly the Internet are still limited to a small proportion of the population. Table 14 (p. 41) also provides useful data on this issue.

Table 13: Access to Fixed-Line and Mobile Telephones

	Fixed Line Telephones			Mobile Telephones			
	Main telephone lines (fixed-lines) per 100 inhabitants (2000)	Main telephone lines (fixed-lines) per 100 inhabitants (2005)	Main telephone lines (fixed-lines) CAGR (%) (2000-2005)	Mobile cellular subscribers per 100 inhabitants (2000)	Mobile cellular subscribers per 100 inhabitants (2005)	Mobile cellular subscribers CAGR ⁵² (%) (2000-2005)	Mobile cellular subscribers as % total telephone subscribers (2005)
Angola	0.49	0.59	3.7	0.2	6.86	111.6	92.1
Botswana	8.27	7.48	-2.0	12.17	46.63	32.7	86.2
Cameroon	0.63	0.61	-0.8	0.68	13.84	85.3	95.8
DRC	0.02	0.02	-1.3	0.03	4.77	183.5	99.6
Ethiopia	0.37	0.79	16.60	0.03	0.53	87.4	40.2
Ghana	1.08	1.45	6.10	0.66	12.85	85.3	89.8
Kenya	0.95	0.82	-2.90	0.42	13.46	105.0	94.2
Mozambique	0.5	0.37	-7.30	0.3	6.16	88.6	94.6
Nigeria	0.49	0.93	13.90	0.03	14.13	261.8	93.8
Senegal	2.16	2.29	1.10	2.63	14.84	47.2	86.6
Sierra Leone	0.42	0.42	~	0.26	~	111.7	100.0
Somalia	0.36	1.22	27.80	1.14	6.08	44.3	83.3
South Africa	10.88	9.97	-1.7	18.28	71.6	32.4	87.8
Tanzania	0.5	0.39	-5.70	0.32	~	104.7	92.9
Uganda	0.25	0.35	6.60	0.52	5.29	64.4	93.8
Zambia	0.78	0.81	0.80	0.92	8.11	57.1	90.9
Zimbabwe	2.19	2.76	4.70	2.34	5.87	21.3	68.1

~ Data not available

Source: "World Telecommunication/ICT Development Report 2006: Measuring ICT for social and economic development", 8th edition, ITU: 2006⁵⁴

Table 14: Estimated Internet User and Mobile Telephone Subscriber Rates

	Internet Users (estimate)				Mobile Telephone Subscribers ⁵³		
	2000	2005	% increase		2000	2005	% increase
Angola	15,000	176,000	1073	Angola	25,806	1,094,115	4140
Botswana	25,000	60,000	140	Botswana	200,000	823,070	312
Cameroon	40,000	250,000	525	Cameroon	103,279	2,259,000	2087
DRC	3,000	140,625	4588	DRC	15,000	2,746,000	18207
Ethiopia	10,000	164,000	1540	Ethiopia	17,757	410,630	2212
Ghana	30,000	401,310	1238	Ghana	130,045	2,842,444	2086
Kenya	100,000	1,111,000	1011	Kenya	127,404	4,611,970	3520
Mozambique	20,000	138,000	590	Mozambique	51,065	1,220,000	2289
Nigeria	80,000	5,000,000	6150	Nigeria	30,000	18,587,000	61857
Senegal	40,000	540,000	1250	Senegal	250,251	1,730,106	591
Sierra Leone	5,000	10,000	100	Sierra Leone	11,940	113,214	848
Somalia	15,000	90,000	500	Somalia	80,000	500,000	525
South Africa	2,400,000	5,100,000	113	South Africa	8,339,000	33,959,960	307
Tanzania	40,000	333,000	733	Tanzania	110,518	194,200	76
Uganda	40,000	500,000	1150	Uganda	126,913	1,525,125	1102
Zambia	20,000	231,000	1055	Zambia	98,853	946,558	858
Zimbabwe	50,000	1,000,000	1900	Zimbabwe	266,441	699,000	162

~ Data not available

Source: "World Telecommunication/ICT Development Report 2006: Measuring ICT for social and economic development", 8th edition, ITU: 2006⁵⁴

Key Points:

- The trajectory of mobile usage far outpaces that of the Internet in most countries, sometimes on a 10-fold magnitude such as in Cameroon and to an even greater extent in Angola and DRC. This relationship holds true in every country except Zimbabwe.
- The average person is much more likely to use a mobile phone than surf the Internet (see Table 15 below).

Table 15: Estimated National Penetration of Internet Users and Mobile Subscribers as Percentage of Population

	Population	Internet Users (2005 estimate)	% Population	Mobile Phone Subscribers	% Population
Angola	15,490,049	176,000	1.14	1,094,115	7.06
Botswana	1,769,050	60,000	3.39	823,070	46.53
Cameroon	16,037,746	250,000	1.56	2,259,000	14.09
DRC	55,852,888	140,625	0.25	2,746,000	4.92
Ethiopia	69,960,840	164,000	0.23	410,630	0.59
Ghana	21,644,440	401,310	1.85	2,842,444	13.13
Kenya	33,467,328	1,111,000	3.32	4,611,970	13.78
Mozambique	19,423,920	138,000	0.71	1,220,000	6.28
Nigeria	128,708,944	5,000,000	3.88	18,587,000	14.44
Senegal	11,385,913	540,000	4.74	1,730,106	15.20
Sierra Leone	5,336,449	10,000	0.19	113,214	2.12
Somalia	7,964,414	90,000	1.13	500,000	6.28
South Africa	45,509,236	5,100,000	11.21	33,959,960	74.62
Tanzania	37,626,916	333,000	0.89	194,200	0.52
Uganda	27,820,556	500,000	1.80	1,525,125	5.48
Zambia	11,478,886	231,000	2.01	946,558	8.25
Zimbabwe	12,936,295	1,000,000	7.73	699,000	5.40

Internet:

- In 10 countries, less than 2% of the national population is estimated to use the Internet.
- Only two countries (Zimbabwe and South Africa) have more than 5% of their population online.
- Combined, South Africa and Nigeria comprise two-thirds of the Internet population within the surveyed countries.

Mobile telephony:

- In 15 countries, 15% of the national population or less are mobile phone subscribers.
- Mobile phone subscriptions, with the exception of Tanzania and Zimbabwe, outpace Internet use in the countries surveyed.
- Considerable differences between the penetration of mobile and Internet use are evident in many countries, with the exception of Sierra Leone, Tanzania, and Zimbabwe.

2.8 Media Support Agencies

News Agencies

The agency infrastructure supporting the media sector is a valuable measure of the sector's level of sophistication. All countries – with the sole exception of Tanzania – report the existence of at least one state-owned or state-controlled news agency. Eleven of the 17

countries reported the presence of private news agencies and six countries reported not having any private news agencies (Angola, Cameroon, Ghana, Mozambique, Sierra Leone and Uganda).

Amongst countries with state news agencies, most countries had one agency while Zambia and Zimbabwe were reported as having two. Concerning private news agencies, there was huge variability in the numbers reported: Kenya (44), South Africa (14), Nigeria (7), Ethiopia (6), Zimbabwe and Senegal (5), with all the other countries having just one or two.

The number of state news agencies remained stable with Botswana being the only country to establish a new state-run news agency after 2000. Similarly, growth in private news agencies was also dormant with only Botswana and South Africa witnessing private news agency start-ups in the past six years.

Table 16: News, Media Monitoring, Advertising Agencies and Audience Research Agencies

	Media Monitoring				Ad Agencies				Audience Research Agency				State News Agency				Private News Agency			
	Number		Increase		Number		Increase		Number		Increase		Number		Increase		Number		Increase	
	2000	2004-6	#	%	2000	2004-6	#	%	2000	2004-6	#	%	2000	2004-6	#	%	2000	2004-6	#	%
Angola	0	~	0	N/A	18	~	N/A	N/A	~	3	N/A	N/A	1	1	0	0	0	0	0	0
Botswana	1	~	N/A	N/A	~	3	N/A	N/A	~	2 ⁶⁵	N/A	N/A	0	1	1	100	0	2	2	200
Cameroon	0	1	1	100	~	86	N/A	N/A	~	1 ⁵⁵	N/A	N/A	1	1	0	0	0	0	0	0
DRC	2	~	N/A	N/A	~	2 ⁶⁵	N/A	N/A	1	~	N/A	N/A	1 ⁶⁷	1 ⁶⁷	0	0	2 ⁶⁷	2 ⁶⁷	0	0
Ethiopia	0	~	N/A	N/A	~	~	N/A	N/A	~	0	N/A	N/A	1 ⁶⁷	1 ⁶⁷	0	0	~	6	N/A	N/A
Ghana	1	0	-1	-100	~	12	N/A	N/A	~	~	N/A	N/A	1	1	0	0	0 ⁶⁷	0 ⁶⁷	0	0
Kenya	1	~	N/A	N/A	~	70 ⁶⁵	N/A	N/A	~	13 ⁶⁵	N/A	N/A	1	1	0	0	~	44 ⁶⁵	N/A	N/A
Mozambique	0	0	0	0	~	21 ⁵⁶	N/A	N/A	0	0	0	0	1	1	0	0	0	0	0	0
Nigeria	~	25	N/A	N/A	87	128	41	47	~	7	N/A	N/A	1	1	0	0	~	7	N/A	N/A
Senegal	2	3	1	50	~	38 ⁵⁷	N/A	N/A	~	~	N/A	N/A	1	1	0	0	5	5	0	0
Sierra Leone	1	2	1	100	~	~	N/A	N/A	~	~	N/A	N/A	1 ⁶⁷	1 ⁶⁷	0	0	0 ⁶⁷	~	N/A	N/A
Somalia	~	6 ⁵⁸	N/A	N/A	~	2	N/A	N/A	~	0 ⁶⁵	N/A	N/A	1 ⁶⁷	1 ⁶⁷	0	0	1 ⁶⁷	1 ⁶⁷	0	0
South Africa	~	12 ⁵⁹	N/A	N/A	~	35 ⁶⁰	N/A	N/A	2	2 ⁶¹	0	0	1	1	0	0	12	14	2	17
Tanzania	~	2	N/A	N/A	~	8	N/A	N/A	~	8	N/A	N/A	0 ⁶⁷	0 ⁶⁷	0	0	1 ⁶⁷	1 ⁶⁷	0	0
Uganda	1	~	N/A	N/A	~	7 ⁶⁵	N/A	N/A	~	3 ⁶⁴	N/A	N/A	1 ⁶⁷	1 ⁶⁷	0	0	0 ⁶⁷	0 ⁶⁷	0	0
Zambia	0	1	1	100	13	13 ⁶²	0	0	1	2	1	100	2	2	0	0	1	1	0	0
Zimbabwe	1	1	0	0	12	12 ⁶³	0	0	5	5 ⁶³	0	0	2	2	0	0	5	5	0	0

N/A Not applicable

~ Data not available

⁵⁵ Source: Repertoire de la presse et de la communication du Cameroun. Communication with BBC WST 8 September 2006

⁵⁶ Source: Association of Advertising Agencies. Communication with BBC WST on 8 September 2006

⁵⁷ Source: Trade Point Senegal. Communication with BBC WST on 8 September 2006

⁵⁸ These are international bodies mentioned in the BBC 2006 media report

⁵⁹ Source: www.biz-community.com. Retrieved 12 September 2006 from <http://www.bizcommunity.com/Companies/196/12.html>

⁶⁰ Source: Advertising and Commercial Association (ACA) South Africa. Communication with BBC WST on 8 September 2006

⁶¹ Source: Piet Smit, South African Advertising Research Agency. Telephone, conversation with BBC WST on 24 August 2006

⁶² Source: Media Institute of Southern Africa – Zambia. Communication with BBC WST on 8 September 2006

⁶³ Source: Zimbabwe All Media and Products Survey (ZAMPS)

⁶⁴ Source: British Council in Uganda. Communication with BBC WST on 8 September 2006

⁶⁵ Source: Local Yellow Pages for country. Retrieved 6 September 2006 from various country yellow pages web sites

⁶⁶ Sourced in country report from Foreign Correspondents Association of East Africa

⁶⁷ Source: News Agencies (Country Name), in EuropaWorld online. London, Routledge. British Broadcasting Corporation (BBC). Retrieved 12 September 2006 from <http://www.europaworld.com>

Sources for all other data are located in the individual AMDI Country Reports

Media monitoring

Of the 17 countries, 13 report having at least one media monitoring agency. Several media monitoring organisations exist in South Africa (12) and Nigeria had the greatest number of such organisations (25). Senegal was next with three such agencies, followed by DRC, Tanzania and Sierra Leone (2), and Kenya, Uganda, Botswana, Zambia, Zimbabwe and Cameroon with one each. Ethiopia, Mozambique, Angola and Ghana did not report having any media monitoring organisations.

Advertising agencies

For most countries, there appears to be a vibrant community of advertising agencies, that speaks to the growing advertising marketplace. The most dynamic countries, in order of descending presence of international, regional or national advertising agencies, are:

- Nigeria (128);
- Cameroon (86);
- Kenya (70);
- Senegal (38);
- South Africa (35); and,
- Mozambique (21).

Available data suggests that advertising agencies are very thin on the ground in DRC, Somalia and Botswana. It is not surprising that advertising agencies have yet to establish themselves in fragile post-conflict countries, but the paucity in such countries, possibly due to the small market size, merits further research.

Audience research agencies

It has been reported that there is no tradition of consumer research in most African countries and indeed this is an inhibiting factor for the private sector and advertising in particular.

Ten of the countries reported the presence of market research agencies. Kenya, South Africa, Tanzania, Nigeria and Zimbabwe are reasonably well-served with market research agencies, with the other countries having varying levels of presence of these media sector bellwethers.

Non-governmental organisations (NGOs)

- All the countries with data reported very large numbers of international and national NGOs in their countries (see Table 17 on p. 45). This data was sourced from various bodies and, as such, does not serve as an exhaustive nor detailed examination of the number of media development-involved NGOs at work in sub-Saharan Africa. The distinctions made between national and international may also include local projects that enable media development.
- For international NGOs, figures ranged from:
Tanzania (655) and Kenya (545) to Somalia (76), Zimbabwe (75), DRC (63) and Botswana (17).
- Those countries well served by NGOs, on a scale ranging from local to a national scale are:
South Africa (36,981), Uganda (6,063), DRC (4,758), Kenya (2,871), Ghana (2,366), and Ethiopia (1,532).

- Countries under-served by both international and national NGOs include Somalia, Mozambique, Cameroon, Senegal and Sierra Leone.
- By comparison, those NGOs working in media development are few in number and concentrated in South Africa (76 national NGOs working in media development) and Tanzania (53 international NGOs working in media development).
- All other countries reported fewer than 10 international NGOs working in their countries on media development projects.

Table 17: Non-Governmental Organisations

	International NGOs				National NGOs				International NGOs in Media Development or running a Media Development Project				National NGOs in Media Development or running a Media Development Project			
	Number		Increase		Number		Increase		Number		Increase		Number		Increase	
	2000	2004-6	#	%	2000	2004-6	#	%	2000	2004-6	#	%	2000	2004-6	#	%
Angola	~	~	N/A	N/A	~	~	N/A	N/A	~	~	N/A	N/A	~	~	N/A	N/A
Botswana	~	17 ⁶⁶	N/A	N/A	~	113	N/A	N/A	~	0	N/A	N/A	~	2	N/A	N/A
Cameroon	~	242	N/A	N/A	0	19	19	1,900	1	4	3	300	0	1	1	100
DRC	~	63	N/A	N/A	450	4,758	4,308	957	~	8	N/A	N/A	5	11	6	120
Ethiopia	120	240	120	100	216 ⁶⁷	1,532	1,316	609	~	6	N/A	N/A	~	1	N/A	N/A
Ghana	~	116	N/A	N/A	~	2,366	N/A	N/A	~	5	N/A	N/A	~	5	N/A	N/A
Kenya	~	545	N/A	N/A	~	2,817	N/A	N/A	1	~	N/A	N/A	8	7	-1	-13
Mozambique	~	256	N/A	N/A	~	55	N/A	N/A	~	5	N/A	N/A	0	0	0	0
Nigeria	~	~	N/A	N/A	~	~	N/A	N/A	~	~	N/A	N/A	0	10	10	1000
Senegal	~	145	N/A	N/A	~	271	N/A	N/A	~	4	N/A	N/A	1	6	5	500
Sierra Leone	47	189	142	302	~	~	N/A	N/A	5	3	-2	-40	6	13	7	117
Somalia	~	76	N/A	N/A	~	74	N/A	N/A	5	6	1	20	~	1	N/A	N/A
South Africa	~	~	N/A	N/A	13,282	36,981	23,699	178	~	~	N/A	N/A	~	76	N/A	N/A
Tanzania	~	655	N/A	N/A	~	~	N/A	N/A	~	53	N/A	N/A	~	~	N/A	N/A
Uganda	~	3,650 ⁶⁸ (02) – 6,063 (06)	2,413	66	~	3,650 ⁶⁸ (02) – 6,063 (06)	2,413	66	~	2	N/A	N/A	~	1 ⁶⁸	N/A	N/A
Zambia	~	~	N/A	N/A	~	~	N/A	N/A	3	7	4	133	16	23	7	44
Zimbabwe	~	75	N/A	N/A	~	667	N/A	N/A	7	~	N/A	N/A	14	17	3	21

N/A Not applicable

~ Data not available

⁶⁶ Source: Olga Mabothe, National Department of Civil and National Registration. Facsimile to BBC WST on 29th August 2006; letter dated 28th August 2006

⁶⁷ Source: Research Manager, Research & Marketing Services (EA) Ltd. Personal communication (email) to BBC WST on 11 September 2006

⁶⁸ The Uganda country report mentions the Uganda Media Women's Association (UMWA) as a key national NGO (see section 9.2); however, this does not denote the total national number

⁶⁹ Source: International and National NGOs are not differentiated at Ministry of Information, Uganda

Sources for all other data are located in the individual AMDI Country Reports

End Notes

¹⁰ As the individual Country Reports attest, compiling this data was no easy feat. In many cases, the data does not exist, is not publicly available or is out of date. Consequently, multiple sources and methods were employed to compile the numbers presented in this research summary report. Every effort was made to cross-check and to verify the data at the country level. All institutional and individual sources are cited. Quantitative data was gathered on demographics, media consumption patterns, number of media outlets, access and usage of new media, the journalism profession and professional development, news agencies and media agencies and media legislation. To identify patterns and trends, these data are tracked over time from 2000 to 2005 or later, depending on available data.

¹¹ Source: World Development Indicators database, Country Data Profiles, The World Bank. Retrieved on 6 September 2006 from www.worldbank.org/africa.

¹² Source: World Development Indicators database, Country Data Profiles, The World Bank. Retrieved on 6 September 2006 from www.worldbank.org/africa

¹³ Source: www.EuropaWorld.com in the Ghana profile for Area and Population. Retrieved on 11 September 2006 from <http://www.europaworld.com>

¹⁴ Source: UNSTAB report, Table 7 ("Population by age, sex and urban/ rural residence: Latest available year, 1994 – 2003") Validated on 6 September 2006 from <http://unstats.un.org/unsd/demographic/products/dyb/dyb2003/table07.pdf>

¹⁵ Source: United Nations Statistics Division. Validated on 11 September 2006 from <http://mdgs.un.org/unsd/mdg/SeriesDetail.aspx?srid=581>

¹⁶ Source: www.EuropaWorld.com in the Ghana profile for Area and Population validated on 11 September 2006 from <http://www.europaworld.com>

¹⁷ Source: Placide Yaptie, Research and Marketing Services-Senegal. Personal communication (email) with BBC WST on 6 September 2006

¹⁸ Source: Sue Scott, Nielsen Media South Africa. E-mailed to BBC World Service Trust (WST) on 4 September 2006.

¹⁹ Source: Data located within BBC InterMedia National Surveys. Hard copies held on file at the BBC World Service Trust (WST), London, UK.

²⁰ Source: Placide Yaptie, Research and Marketing Services-Senegal. Personal communication (email) to BBC World Service Trust (WST) on 6 September 2006.

²¹ A 1999 report notes that there were eight major registered radio stations but only three provided coverage outside Dar es Salaam. No independent stations are allowed to cover the entire country. See Tripp (1999) "Political Reform in Tanzania: The Struggle for Associational Autonomy". Retrieved 7 September 2006 from <http://www.sx.ac.uk/ecpr/events/jointsessions/paperarchive/mannheim/w3/tripp.pdf>.

²² The figure of 18 combines 17 community radio stations (as licensed by the IMC) and UN Radio, that is scheduled to be handed over to the government.

²³ The figure of 24 combines 7 religious stations (as licensed by the IMC) with 17 community radio stations (IMC – licensed) and two additional stations that will be launched by the end of 2006.

- ²⁴ Sierra Leone does not have the infrastructure for a truly national broadcaster. However, the Sierra Leone Broadcasting Service has established six regional stations that operate under the SLBS banner but are not necessarily repeater stations.
- ²⁵ Source: Research Manager, Research & Marketing Services (EA) Ltd, personal communication (email), 11 September 2006 from the Somali Embassy in Nairobi.
- ²⁶ Source: Radio (Mozambique), in EuropaWorld online. London, Routledge. British Broadcasting Corporation (BBC). Retrieved 12 September 2006 from <http://www.europaworld.com>
- ²⁷ Source: InterMedia Reports held at BBC WST, London. Using viewership estimates based on "When TV viewed last".
- ²⁸ Source: Television (Somalia) in EuropaWorld online, London, Routledge. Retrieved 12 September 2006 from <http://www.europaworld.com>.
- ²⁹ The increase in television ownership represents time period 2004 to 2005.
- ³⁰ The increase in television ownership represents time period 2000 to 2002.
- ³¹ Source: Fila Karashini, The Media Council of Tanzania. Personal communication (email) to BBC WST on 2 September 2006.
- ³² Source: Television (Tanzania) in EuropaWorld online, London, Routledge. Retrieved 12 September 2006 from <http://www.europaworld.com>.
- ³³ Source: South African data provided by Nielsen Media Research includes the following data collection parameters:
- Newspaper – % adult population read an average issue of any weekly newspaper (read for the first time within past 7 days)
 - Newspaper – % adult population read an average issue of any daily newspaper (read for the first time "yesterday")
- ³⁴ Source: The Ethiopia Country Report indicates 56 total newspapers (national and regional). Source: Ministry of Information, personal communication (telephone), August 2006.
- ³⁵ Source: According to the Ghana Country Report (AMDI 2006), there are 23 biweeklies and two regional newspapers.
- ³⁶ Source: Puntland and South Somali newspapers assumed to be dailies as per email correspondence with Country Researcher.
- ³⁷ Source: Raphael Hokororo, National Department of Information Services (MAELEZO), Tanzania. E-mail to BBC WST London on 6 September 2006.
- ³⁸ Source: EuropaWorld online. London, Routledge. British Broadcasting Corporation (BBC). Retrieved 12 September 2006 from <http://europaworld.com>
- ³⁹ Source: Ministry of Communication, Cameroon. Personal communication (telephone) with BBC WST on 6 September 2006.
- ⁴⁰ No information that bifurcates daily and weekly newspapers was located. Additionally, the uncertain publishing schedules of many newspapers in Sierra Leone mean that there are typically 25 newspapers being published at one time. See Figure 5 and 7.1.3 of Sierra Leone Country Report.
- ⁴¹ Data calculated by dividing the number of journalists in column 2 and the population for the most recent year of census data.

- ⁴² Calculation derived from 2004 mid-year 45,509,236 population estimate (EuropaWorld).
- ⁴³ For more information on Zimbabwe's Access to Information and Protection of Privacy Act (AIPPA 2002), see Section 3.1 of Zimbabwe Country Report.
- ⁴⁴ Source: Media Barometer Botswana Report (2005) by Methaetsile Leepile and Sechele Sechele. Presented at the Media Barometer Panel Workshop, Lobatse, 18-19 June 2005. Confirmed through BBC WST personal conversation with MISA-Botswana, 7 September 2006.
- ⁴⁵ Source: Human Rights Watch, "Silencing Dissent". Retrieved 11 September 2006 from <http://hrw.org/backgrounder/africa/drc1205/5.htm>.
- ⁴⁶ Source: IPI. Retrieved by BBC WST on 7 September 2006 from http://www.freemedia.at/cms/ipi/freedom_detail.html?country=/KW0001/KW0006/KW0155/.
- ⁴⁷ Source: Nigerian Union of Journalists (Lagos Council). Retrieved by BBC WST on 8 September 2006 from <http://www.lagosnuj.com/history.html>.
- ⁴⁸ Source: National Union of Somali Journalists (NUSOJ). Retrieved by BBC WST on 8 September 2006 from <http://www.nusoj.org>.
- ⁴⁹ Source: Personal communication (telephone) between representative of Institute of African Journalists and BBC WST, 8 September 2006.
- ⁵⁰ In the context of the research project, professional development included a broad range of training and related activities for current media practitioners. However, much of the professional development captured within this study was specific to journalist training, whether skills-based or management-training.
- ⁵¹ Source: John Bwire, Secretary of Media Council Tanzania and Secretary Commonwealth Press Union. Personal communication (telephone) with BBC WST on 2 September 2006.
- ⁵² CAGR is cumulative annual growth rate.
- ⁵³ It is important to acknowledge that this statistic lists cellular mobile subscribers and not users. The data as taken from the International Telecommunication Union (ITU) defines subscribers as "users of portable telephones subscribing to an automatic public mobile telephone service that provides access to the Public Switched Telephone Network (PSTN) using cellular technology. This can include analogue and digital cellular systems but should not include non-cellular systems. Subscribers to fixed wireless [eg, Wireless Local Loop (WLL)], public mobile data services, or radio paging services are not included" (ITU, 2006).
- ⁵⁴ The above data also includes the following years of data captured: Tanzania mobile data is from 2004 ITU; Sierra Leone mobile data is from 2003 ITU. Internet data from the following countries is from 2004 ITU reports: Mozambique, Sierra Leone, Tanzania and Zambia.
- ⁵⁵ Source: Répertoire de la presse et de la communication du Cameroun. Personal communication with BBC WST 8 September 2006
- ⁵⁶ Source: Association of Advertising Agencies. Personal communication with BBC WST 8 September 2006
- ⁵⁷ Source: Trade Point Senegal. Personal communication with BBC WST 8 September 2006
- ⁵⁸ These are international bodies mentioned in BBC 2006 media report.
- ⁵⁹ Source: www.biz-community.com Media Monitoring Companies. Retrieved 12 September 2006 from <http://www.bizcommunity.com/Companies/196/12.html>

- ⁶⁰ Source: Advertising and Commercial Association (ACA) South Africa. Personal communication (email) with BBC WST 8 September 2006
- ⁶¹ Source: Piet Smit, South African Advertising Research Agency. Personal communication (telephone) with BBC WST 24 August 2006.
- ⁶² Source: Media Institute of Southern Africa – Zambia. Personal communication (telephone) with BBC WST 8 September 2006
- ⁶³ Zimbabwe All Media and Products Survey (ZAMPS)
- ⁶⁴ Source: British Council in Uganda. Personal communication (email) with BBC WST 8 September 2006.
- ⁶⁵ Source: Local Yellow Pages for country. Retrieved 6 September 2006 from various country Yellow Pages web sites.
- ⁶⁶ Source: Olga Mabothe, National Department of Civil and National Registration. Personal communication (fax) to BBC WST on 29 August 2006; letter dated 28 August 2006.
- ⁶⁷ Source: Research Manager, Research & Marketing Services (EA) Ltd. Personal communication (email) to BBC WST on 11 September 2006.
- ⁶⁸ Source: The Uganda country report mentions the Uganda Media Womens Association (UMWA) as a key national NGO (see section 9.2); however, this does not denote the total national number.
- ⁶⁹ Source: International and national NGOs are not differentiated in data provided by the Ministry of Information, Uganda.



3. Media Legislation and the Regulatory Environment

This chapter reviews the enabling environment – and how media legislation, and the respective roles and responsibilities of media and the state, are changing.

3.1 Previous work

The right to receive information and to freedom of expression is set out in the African Charter of Human and Peoples' Rights, adopted in 1981 and in force since 1986. Alongside the 1991 Windhoek Declaration on Promoting an Independent and Pluralistic African Press and the 2001 African Broadcasting Charter, they are fundamental components of the African Union's policies to develop democracy and pluralism. The aims of these documents were adopted in 2002 by the African Commission for Human and Peoples' Rights in its Declaration of Principles on Freedom of Expression in Africa. A broad range of national and regional organisations and institutions have been established throughout Africa to work towards the repeal of repressive legislation, to support broadcasting reform, monitoring of media output and a range of related activities.

This section provides a brief introduction to research, analysis and monitoring work in the areas of media legislation and supporting efforts. This short review has been divided into three sections. The organisations and literature studied are not intended to be comprehensive but are indicative of fields of research relevant to the creation and support of an enabling media environment in Africa.

Media and democracy

The link between media and democracy has captured the attention of a number of scholars. Some examples are Tetey (2002; 2006) and Hyden, Leslie & Ogundimu (2002), who examine media and democracy in Africa. Kasoma (1995) looks at the role of independent media while Nyamnjoh (2005) contextualises the development and use of media in Africa, and discusses the need to be cognisant of African cultural and political realities in discussions of media and democracy.

Access to information and freedom of expression

Driven by the widespread violation of freedom of expression and access to information, lobbying for the reform of media laws has been a primary focus for international organisations, such as Article 19 and pan-regional organisations such as the Freedom of Expression Institute (FXI), the Media Foundation for West Africa (MFWA), the Media Institute of Southern Africa (MISA) and the Southern African Broadcasting Association (SABA). As part of their wider remit to undertake lobbying, capacity-building and facilitation of public debate, many of these organisations have carried out regional or country-specific studies into issues relating to freedom of expression and access to information, providing useful evidence of the important relationship between freedom of expression and delivery of other socio-economic rights⁷⁰.

Other organisations that focus on protecting the freedom and safety of journalists are also involved with ongoing and *ad hoc* research to monitor and publicise mistreatment of journalists. These include work carried out by the International Federation of Journalists (IFJ), the Committee to Protect Journalists (CPJ), Reporters sans Frontières (Reporters Without Borders) and Journalist in Danger (Journaliste en Danger).

A number of agencies and academics have produced country-specific as well as regional assessments of freedom of expression and access to information. Such reports have been carried out in Angola (Marques & Pierce, 2004; Rafael & Roemersma, 2003); Botswana (Balule & Maripe, 2000); Cameroon (African Press Agencies, 2005); DRC (Panos Paris, 2004a), Ethiopia (Amonge, 2005); Kenya (Moggi & Tesser, 2001); Sierra Leone (Mbayo 1997); South Africa (Hadland & Thorne, 2004); Senegal (Sy, 2003; Guèye 2006); Uganda (Mwesige, 2004; Onyango-Obbo, 1999; Robbins, 1997) and Zimbabwe (Mendel & Mukundu, 2004).

Mbayo (2006) provides a regional perspective through his high-level overview of the state of media in West Africa. Seleane (2002) offers a comparative study of freedom of expression between South Africa, Malawi, Zambia and Algeria, alongside a number of other countries outside Africa. *Journaliste en Danger* (JED) (2004)⁷¹ examines legislative reform across nine countries. White and Daddy (2006) review media laws across Lesotho, Tanzania and the DRC.

The MISA publication, *So This is Democracy? The State of Media Freedom in Southern Africa*, has been published annually and for 2005 covered 11 countries in Southern Africa⁷². The work surveys the state of media freedom, logs freedom of expression violations and also provides an analysis of gender representation in media. *Tachilisa* (2004) is a MISA-sponsored publication that examines media freedom laws across nine member states of the Southern Africa Development Community⁷³. The Open Society Institute (Open Society Institute, 2006) recently published a piece of comparative research that examines access to information laws across 14 countries. AMDI research countries covered by the publication are: Ghana, Kenya, Nigeria and South Africa. Meanwhile, Feustel & Germain *et al* (2005) attempt to provide a "conceptual framework... to consider the link between press freedom and good governance".

Media indices

In February 2006, the Intergovernmental Programme for the Development of Communication (IPDC), a forum of the United Nations, announced a global initiative to devise standard media development indicators⁷⁴. With increased attention on the development of media as part of a wider development agenda, a number of indices and reviews have been developed, predominantly by NGOs, in an attempt to assess the "health" of the media sector (Norris, 2006). The approaches vary in scale, geographic reach, methodological rigour, and frequency. Recently, the World Bank and the Canadian International Development Agency (CIDA) jointly proposed a project that would attempt to harness existing networks, partnerships and indicators on media development and focus attention on continental Africa.

The following section provides a brief overview of 10 separate initiatives that have attempted to evaluate media development, many in an African context. Many of these were reviewed during the design of the African Media Development Initiative research and during the AMDI analysis in order to validate findings.

The African Media Barometer

In 2005, the Media Institute of Southern Africa (MISA) and the Friedrich Ebert Stiftung (FES) started an initiative to assess and measure the media environment of countries in sub-Saharan Africa. Each country is assessed on a series of indicators by a national panel consisting of up to 10 people, with one half directly involved in the media (practitioners, academics and owners) and the other half from other areas of civil society (human rights, gender, church groups, trade unions etc). The indicators are formulated as ideal goals based mainly on African benchmarks lifted from the Declaration on Principles of Freedom of Expression in Africa. They cover the areas of freedom of expression, the media landscape, broadcasting regulation and media practice. To date, a minority of countries in Africa have been assessed.

Freedom of the Press survey

The Freedom of the Press survey is conducted by the US-based NGO Freedom House International (FHI). The survey has been conducted annually since 1980 and in Africa is divided up into sub-Saharan Africa (48 countries), the Middle East and North Africa. The survey explores “the degree to which each country permits the free flow of information”, employing a scoring system to assign each country to a category (Free, Partially Free or Not Free).

The Global Corruption Barometer

The Global Corruption Barometer is produced by Transparency International (TI). This index defines corruption as “the abuse of public power, say by a civil servant or politician, for personal benefit”. It also assesses and illustrates perceptions of corruption across a number of sectors, including media. A three-page survey is used to create the Barometer, with only one question dealing directly with media.

The Corruptions Perceptions Index

The Corruptions Perceptions Index (CPI) is produced annually by TI and is similar to the Global Corruption Barometer in that it charts the perceptions of the degree of corruption in a country. The CPI is a composite index and is therefore based on the compilation of multiple existing data sources (18 polls from 12 institutions).

The World Press Freedom Review

The World Press Freedom Review is produced annually by the International Press Institute and examines the “state of the media in over 184 countries, territories and administered areas, documenting press freedom violations and major media developments all over the world”.

The Worldwide Press Freedom Index

Reporters Without Borders produces the Worldwide Press Freedom Index, which ranks and scores a total of 167 countries. Conducted since 2002, the index measures “the degree of freedom journalists and news organisations enjoy in each country, and the efforts made by the state to respect and ensure respect for this freedom”.

Africa Governance, Monitoring and Advocacy Project (AfriMAP)

The Africa Governance, Monitoring and Advocacy Project (AfriMAP) is an initiative funded by the Open Society Institute. AfriMAP was designed around three themes: (1) the justice sector and rule of law; (2) political participation; and, (3) the delivery of public services.

In addition to these surveys, the Media Sustainability Index, administered by the American non-profit International Research and Exchanges Board (IREX) in cooperation with the United States Agency for International Development (USAID) is not yet applied to sub-Saharan Africa.

Many of the indices just outlined have been used to validate and review data yielded in the current research and, moreover, comprise an invaluable body of work for those involved with media development.

3.2 Survey of findings

An assessment was made of the status of media legislation in each country with respect to criminal defamation, establishment of independent media regulatory bodies, independence of publicly-owned media, support for community media, the public-service remit of state and commercial media and access to information.

While there are many examples of countries where there are no laws or legislative provisions in place on a range of media criteria, there is a general trend to enact new law and regulation based on democratic principles. In many cases, while actual legislation is not in place, it is awaiting approval and/or some provisions necessary to come into existence. The more challenging situations are where legislation is in place but is ignored, is not enforced or is judged to be manipulated by the state.

Criminal defamation and libel laws

The use of criminal defamation and libel laws were found to be still actively in use in at least five countries (Cameroon, Mozambique, Sierra Leone, Somalia [Somaliland], Zimbabwe). Moreover, where repressive laws have been repealed, state-sponsored mechanisms for the sanctioning of journalists were still reported to exist in at least eight countries (Angola, DRC, Kenya, Nigeria, Senegal, Tanzania, Uganda, Zambia). In Uganda, for example, the drafting of recent “anti-terrorism” legislation was seen as having a detrimental impact on press freedom.

A further impact of these laws and mechanisms is evident in Zambia, where the Country Report author claimed that the authorities were “fostering a culture of restraint amongst journalists”. While the governments of Botswana and Senegal recognise, in practice, the need to repeal slander/insult laws, little action has been taken. In Sierra Leone, NGOs have been consistently lobbying the government to repeal the Public Order Act of 1965.

Independent media regulatory bodies

For the sake of this report, there are two types of regulatory bodies. First, there are broadcasting regulators who issue licences and supervise compliance with licence conditions; currently, these are independent of the government only in South Africa and to a certain extent in Ghana. Despite their presence in many of the countries in this survey, independent broadcasting regulators are underdeveloped.

Secondly, there are bodies that enforce professional standards in the media in general. Typically, they are either independent self-regulating bodies administered by the media sector and not based on any law, or they are statutory bodies established by law and are therefore not independent.

Laws enabling media regulatory bodies to function independently exist in eight of the 17 countries studied (Botswana⁷⁵, Ghana⁷⁶, Sierra Leone, Tanzania⁷⁷, Senegal, South Africa⁷⁸, Uganda, Zambia⁷⁹) with one country (Angola⁸⁰) reported to be developing legislation along these lines. In the eight countries that have established the legislation, all of the Country Report authors expressed a healthy scepticism as to the independence of these bodies in practice. Eight countries (Cameroon, DRC, Ethiopia, Kenya, Mozambique⁸¹, Nigeria, Somalia [Somaliland] and Zimbabwe) did not have legislation and while some of these countries did have regulatory bodies, they were state-run.

Regulation mechanisms for media in general

In many countries, there are codes of professional standards in place for media adherence. In most cases, these codes have been developed by the media fraternity itself (Botswana, Ghana, South Africa, Tanzania, Zambia, Kenya, Angola). The codes are mostly enforced by self-regulatory bodies (media councils), set up by the media itself (eg Botswana, Tanzania, South Africa, Zambia, Kenya⁸²). In a few countries, regulatory bodies were set up by law [for example, Ghana (National Media Commission's independence guaranteed by the constitution), Mozambique (dormant) and Zimbabwe⁸³].

Independence of publicly-owned media

Legislative provisions aim to secure the independence of publicly-owned media, and broadcasting services in particular, were found not to be in place in 11 of 17 countries (Angola, Botswana, Cameroon, DRC, Ethiopia, Kenya, Nigeria, Sierra Leone, Somalia [Somaliland], Tanzania, Zimbabwe). Of these countries, Kenya and Sierra Leone reported working towards specific legislation. In 2004, legislation was introduced by the government and signed by the President, transforming Zambia's state broadcaster into a public broadcaster; however, this has not yet been implemented. Moreover, many governments in the countries surveyed have retained ownership over print media and news agencies. Despite the move toward or existence of legislation securing independent, publicly-owned media, this does not guarantee; 1) freedom from interference as was noted in Senegal, or; 2) strong patronage as in Mozambique.

Only two of the 17 countries (Ghana and South Africa) appeared to have established provisions in place to secure the independence of publicly-owned media.

Support for community and alternative media

Provisions and legal frameworks were found to be lacking for community and alternative media. Five (Angola, Botswana, Nigeria, Somalia [Somaliland], Zimbabwe) countries appeared to offer no provisions for, and had no legislation in place to support, community or alternative media. In 10 countries (Cameroon, DRC, Ghana, Ethiopia, Kenya, Mozambique, Sierra Leone, Tanzania, Uganda, Zambia), either limited legislation exists that simply recognises the right for community media to function but provides little to no support, or legislation does not exist but some provisions are made by the government on a piecemeal basis. Of the countries without such legislation, DRC was the only country reported to be working towards the formal recognition of community media. Only South Africa has legislation in place for the independent licensing of community radio and television stations.

While government may formally or informally recognise the right for community or alternative media to exist, as highlighted in Zambia, support for community and alternative media typically comes from the NGO community and not the government. The only country

reported to have a dedicated agency with the explicit remit to provide financial and logistical support towards the establishment of community or alternative media was South Africa.

State media – public-service broadcasting remit

Ten countries (Angola, Botswana, Cameroon, DRC, Ethiopia, Mozambique, Nigeria, Sierra Leone, Somalia [Somaliland] and Zimbabwe) reported that there were no regulatory obligations for public or state broadcasters to fulfil a public service broadcasting remit. Further, in Kenya there was reported to be no clear remit, despite efforts to increase access and to broadcast in multiple languages. In Zambia, legal wrangling has meant that despite legislation being in place, public media remain under state control. In four countries (Ghana, Senegal, Tanzania and Uganda), obligations for public/state broadcasters were in place but their application was seen as patchy. Only one country (South Africa) appeared to have clear regulatory obligations for the public broadcaster to fulfil a public service broadcasting remit.

Private media – public-service broadcasting remit

There are no regulatory obligations for private or independent broadcasters to fulfil a public service broadcasting remit in seven countries (Angola, Botswana, DRC, Mozambique, Nigeria, Somalia [Somaliland], Zimbabwe). In two countries (Kenya, Uganda), draft legislation of this nature was in preparation while Sierra Leone reported having an “unwritten rule” for private/commercial media to dedicate time to national issues. Six countries (Cameroon, Ghana, Senegal, South Africa, Tanzania, and Zambia) reported having legislation/regulation from either the government and/or the independent regulator (by way of licensing conditions and regulations as in South Africa) that emphasised an obligation to produce local content for TV and radio. However, there was little evidence – apart from South Africa – to suggest their practical enforcement.

Access to and freedom of information

In general, there appears to be an absence of specific legislation that guarantees access to and freedom of information. Countries such as Mozambique give reference to freedom of information either in their Constitution or in press laws but do not have specific legislation. However, laws governing access to information are pending in six of the 17 countries (Angola, Ethiopia, Ghana, Kenya, Nigeria and Zambia), with freedom of information legislation having only been recently drafted in both Angola and Kenya. Botswana has indicated in a government vision document that it would like to implement a freedom of information act by 2016, though no formal processes have been started. In Zambia, the government had tabled a Freedom of Information Bill before Parliament but withdrew it in 2001 for “further consultations”, that remain ongoing.

Of greater concern are two countries (Ghana and Nigeria) where legislation has been pending government approval for up to six years. This represents a real stumbling block in those countries to genuine freedom of expression and access to information. While no official legislation is pending, Zambia could also be placed in this category, as the government has been running “consultations” about potential legislation since 2001, but has rejected an access to information bill introduced in parliament as a private member’s bill.

Where access to information laws do exist, countries such as South Africa, Tanzania and Uganda reported problems with the application of the law, including governments withholding information in the name of national security.

3.3 Lessons Learned – media legislation

In all of the countries surveyed, significant changes were reported in the media regulatory environment as a result of increasing levels of democratisation, more conducive political and economic environments, and increased national and international media development activity. However, as mentioned above, many of the positive directions towards which media environments were moving were invariably challenged and compromised. In many cases, although legislation, licensing and regulatory bodies exist, they are not operating in the manner they were conceived because of political interference and the lack of real political will to implement liberalisation and reform. Media development activities addressing regulatory and legislative issues can be clustered into four categories:

- advocacy;
- establishment of regulatory bodies;
- legislative reform; and,
- licensing.

In the area of **advocacy**, activities included promoting good governance through legislative reform aimed at freedom of expression and access to information; developing more supportive environments for media organisations; promoting a structure for the protection of human rights; setting directives on journalists' salaries and working conditions; and promoting media representation of marginalised groups;

The establishment of independent media regulatory bodies (cited as a successful area of media initiative activity) included the creation of Press/Media Councils, independent boards for public broadcasters and independent Broadcasting Regulators/Authorities;

The reform of criminal libel laws and human rights legislation, included the repeal of anti-media and criminal libel laws and the decision not to pass the Mass Media Bill in Botswana, as well as lobbying for media rights and freedom of expression in Zimbabwe.

The increase in the number of licensed media outlets has been facilitated by considerable deregulation across the continent. This has resulted in a flourishing broadcasting and telecommunications market and the introduction of competition and diversity in radio and television.

There are cases, however, such as Nigeria and Senegal, where the lack of consistency in criteria for licensing has been noted. In Senegal, the Agence de Régulation des Télécommunications (ART) and the Conseil National de Régulation de l'Audiovisuel (CNRA) continue to receive criticism for their TV licensing process and lack of regulatory independence from government. In the case of Nigeria, the licensing process that is administered by the government and not an independent body, is described in the AMDI Country Report as "cumbersome".

Case studies

This section draws on lessons learned from media legislation and regulatory reform initiatives in the work of the following organisations and projects.

Advocacy and lobbying

Ethiopia

Panos Ethiopia has initiated public debate through convening a series of workshops, conferences and other forums to create a dialogue between professionals and policy-makers.

Kenya

The Kenyan Union of Journalists and the Media Council of Kenya are fighting the government's continuing efforts to curb media freedom through the Media Bill ("Gag Bill").

Uganda

The **Uganda Media Women's Association** (UMWA) established a newspaper called *The Other Voice* to influence government policy on women's issues. Published bi-monthly in five languages since 1998, *The Other Voice* addresses gender issues and those of other marginalised groups in Uganda. In 2005, it highlighted the Constitutional Amendment (2005), domestic violence and HIV/AIDS, among other issues.

Zambia

The **Press Association of Zambia** (PAZA) established a newspaper, *PAZA News*, to promote good governance by advocating on issues of media ethics, constitutional and electoral reform. PAZA and the **Media Institute of Southern Africa** (MISA-Zambia) have been instrumental in pushing for broadcasting reform.

South Africa

The **Media Institute of Southern Africa** (MISA-South Africa) and the **Freedom of Expression Institute** (FXI), along with other organisations, successfully lobbied the government to establish a statutory body to support small commercial and community media organisations. This led to the government's proposal to create the Media Development and Diversity Agency (MDDA), that then led to further successful lobbying to reduce government control over the MDDA. The two organisations also run specific advocacy programmes supporting media freedom and access to information. The **Association of Independent Publishers** (AIP) and **Print Media South African** (PMSA) also participate in lobbying activities.

Zimbabwe

Zimbabwe Lawyers for Human Rights is an NGO working towards building a supportive media environment in Zimbabwe. They established the Human Rights Defenders Fund to support lobbying work at the African Commission on Human and Peoples' Rights (ACHPR) in Banjul, The Gambia, in 2005. The Commission has since condemned Zimbabwe media laws.

Senegal

Syndicat des Professionnels de l'Information et de la Communication du Sénégal (SYNPICS), the country's largest journalist union, lobbied the government and drafted legislation to protect the pay and working conditions of communications professionals, including journalists. The bill was adopted by the government as Act 96-04.

Legislative Reform

Botswana

Media Institute of Southern Africa (MISA-Botswana) has taken an active role in influencing the formulation and adoption of media laws and was central to the rejection of what was seen by many as a “draconian” Mass Media Bill.

Ghana

The Ministry of Information established a forum for journalists called “Meet the Press” whereby government ministers would hold regular, scheduled, open question-and-answer sessions with journalists. The ongoing initiative sought to increase transparency and accountability and stopped the situation whereby only a few favoured journalists had access to government officials.

Zimbabwe

The **Media Institute of Southern Africa (MISA-Zimbabwe)** coordinates workshops, training and lobbying as well as tailoring submissions to Parliament to seek the repeal of specific media laws, such as the Access to Information, Protection of Privacy, Public Order and Security and Broadcasting Services Acts.

Licensing

Sierra Leone

The **Independent Media Commission (IMC)** was established by an act of Parliament in 2000 – and legislated to be independent from direct government influence. It is governed by a council, some members of that are nominated by the Sierra Leone Association of Journalists but with membership approval by the President required. The Commission, assisted by the privatisation programmes of the democratically-elected government, has helped facilitate a significant rise in the number of licenses issued to radio stations (from 5 to 33) and to newspapers (from 10 to 44) since 2000.

Media legislation and regulatory reform

1. Regional structures

Regional activity – much of it in Southern Africa and largely under the auspices of the Media Institute of Southern Africa (MISA) – combined with the sharing of skills and expertise in lobbying for/establishing media self-regulatory bodies has been largely successful. Regional initiatives have proven to be most effective with individual governments when they have a strong national presence.

Challenges

Many of the stakeholders commented on the need for pan-African or regional structures to create effective mechanisms to share good practice and examples of successful initiatives from other countries. It is also essential that regional structures are supported at the national level.

2. Government engagement

The need to work with national governments in order for initiatives to gain momentum is imperative, often unavoidable, and sometimes problematic. The importance of mutual understanding between government and media practitioners/organisations is cited as crucial to the success of many projects. In addition, engagement with regional governance structures was also identified as an effective strategy. Mechanisms such as the African Peer Review – a peer-review and self-monitoring of political and economic governance championed by NEPAD (New Partnership for Africa's Development) – work towards increased transparency and dialogue with governments.

Challenges

Overcoming government resistance to change requires sustained engagement, as evidenced in Zimbabwe and Sierra Leone. It requires ongoing activity and monitoring to overcome the lack of political will to implement/enforce or the tendency to enforce selectively and oppressively. In most instances, regulatory bodies are limited in their activities and few are truly independent from government. An example is Nigeria, in that the regulatory bodies are overseen and funded by the executive branch of government. Achieving a working relationship with the government while maintaining an independent stance is a significant challenge reported by many consulted in the research.

3. Stakeholder buy-in

Harnessing appropriate partnerships and networks with shared objectives is identified as an effective strategy in successful initiatives. This has been demonstrated by the Media Alliance of Zimbabwe, where local organisations and trade unions of journalists work together in a drafting and lobbying capacity to change legislation. A further example of a successful coordination between stakeholders is the creation of the Media Trust Fund in Zambia. Established in 1998 with support from the Norwegian Agency for Development Cooperation (NORAD), the Media Trust Fund provides funding and training to support state, private and emerging media outlets, and has recently developed a specific focus on rural community radio. What is significant about the fund is that it is the result of coordinated support from foreign funders and domestic media support organisations.

Challenges

Maintaining successful partnerships should not be underestimated. Many partnerships falter where objectives are conflicting or where there was a lack of clear objectives at the outset. It is imperative that stakeholder agendas be harmonised.

4. Raising awareness at multiple levels

A common objective across a range of initiatives focused on legislation and regulatory reform is to raise awareness about the issues being addressed. This can happen at a high level by lobbying politicians and policy-makers combined with more bottom-up approaches like public campaigning and programming. An example is *ebimeeza* (open air discussions broadcast live on radio), radio programmes introduced by the Uganda Media Centre, where the population debate issues of national interest through talk shows and call-in programmes. However, in 2004, this programming came under government pressure to edit content viewed as political in nature⁸⁴.

Awareness-raising strategies are greatly enhanced by training media practitioners and media organisations in media legislation, that can be achieved by forging strong partnerships with academics and developing legal expertise.

Challenges

Awareness-raising can be expensive and time-consuming. Pursuing individual legal cases, for example, is a successful high-profile activity, but requires expertise and long-term finance.

5. Monitoring and evaluation

Producing regular evidence through monitoring and evaluation activities focuses attention on the status and/or impact of legislation and regulatory reform efforts. In Southern Africa, the MISA *So This is Democracy?* project produces media monitoring alerts reaching regional and international freedom of expression monitoring groups. Other organisations produce ongoing monitoring of progress on reform through the use of indicators. In a similar vein, it is imperative to produce regular evidence of economic growth from the impact of deregulation (new players, advertising revenues etc.) to stimulate investment.

Challenges

Monitoring and evaluation activities are also expensive and time-consuming. These efforts are often viewed as a “nice to have” element in development projects, rather than as an integrated investment activity to both measure progress and to inform changes in direction.

3.4 Considerations for future activity

A key barrier to the development of the sector is perceived to be the degree of control and influence that many states exert over media, through overt ways (punitive or restrictive legislation, for example), or, more subtly through withdrawal of advertising spend (governments are the biggest advertisers in many countries). For many of those interviewed, creating an enabling environment should take precedence over all other media development initiatives and creating an enabling environment embraces a range of activities to support state/public, community and private media. These include: strengthening regulatory frameworks; the fair provision and allocation of licenses and frequency; the protection of journalists; regulation guaranteeing freedom of expression and access to information; and, fostering the conditions for private media growth.

Challenges vary in scale and in level of activity required, depending on the current status of regulatory frameworks, maturity of the media and the political will that exists for reform and change. Future priorities fall into two categories:

- advocacy and lobbying; and,
- establishment of and support for independent regulatory bodies.

Advocacy and lobbying

Effective work requires engaging multiple stakeholders in advocacy and lobbying efforts, including pan-regional groups, politicians, policy groups, media houses and the public. The issues to be addressed span all media sectors and, in some cases, require attention to some specific legislative issues.

“ I know, for example, we have at the National Assembly, the Freedom of Information Bill. If that were passed, then we have a huge input on the work of the media. It has been sitting in the National Assembly for the last six years. Because it will empower the media... you can never have good governance without intrusive media telling the society this is what is happening. ”

(Kabiru Yusuf, Editor-in-Chief, Media Trust Nigeria Limited, Nigeria)

□ **Broaden the Debate at Multiple Levels In-country**

In order to bring about regulatory reform, it is considered essential to broaden the debate about frameworks and their impact on the media among opinion leaders, media owners and practitioners and the civil population at large. Civil society activism, public fora and debates are key vehicles in raising awareness on media rights and legislation, as identified by interviewees throughout Botswana, South Africa, Zambia and Zimbabwe.

“ To understand what a nation is, and what democracy is.... And there is also re-broadcasting the debates, discussions of those who listen to the public broadcasting so that the people will begin to develop a sense of ownership of the media. ”

(Professor Abiyi Ford, Dean, School of Journalism and Communications, University of Addis Ababa, Ethiopia)

□ **Develop strong regional networks**

Developing or utilising regional partnerships or networks is seen as an effective way of achieving advocacy goals. The effectiveness of MISA's lobbying activities across Southern Africa was cited a number of times. National governments are influenced by policy norms agreed at the UN, AU or regional level.

□ **Invest in organisational reform of state media**

A robust state/public service media free from government interference is considered a key to improving the sector but also in progressing reform at a wider level. A starting point for achieving such a goal might be to undertake reform at an organisational level, whereby state-controlled media are properly structured with transparent systems of appointment and accountable governance⁸⁵.

“ A complete restructuring of the state-owned media into a public broadcaster, that may not necessarily make money but will serve a crucial community service, campaigning in specific areas such as promoting literacy in the country, or on sensitising communities on the dangers of certain risky behaviour. ”

(Government, Media Practitioner, Uganda)

□ **Increase transparency and accountability of private media**

A similar type of support for private media is required in order to assist private media in becoming more transparent and accountable in their practice and governance structures. This in itself will make private media more attractive to investors.

“ I'm a member of the National Programme on Governance and I think basically the donor community [should] insist on good governance. If our media houses are well directed and we... are able to write good projects to help improve our status, and the projects are studied by the donor community, there is a lot of help that can be given to us... ”

(Peter Essoka, Analyst and Member of the Human Rights Commission, Cameroon)

□ **Prioritise a range of extreme individual cases**

In a number of countries, there is a desire to focus on specific pieces of media reform. Some examples cited include:

Nigeria: Lobbying to support implementation of the Freedom of Information Bill (under review for six years);

Ghana: Support/lobbying to ensure that judiciary do not impose draconian fines on media organisations as a means of curtailing their activities;

Zambia: Advocacy required to ensure fair trading in media products, for example non-discriminatory government advertising in media institutions;

Zambia/Ethiopia: Campaign to reduce tax on imports of media-related products, such as televisions, computers;

Uganda: Support reform for Penal Code and the Journalists' Press Statute; and,

Zimbabwe: Lobbying/advocacy to campaign for repeal of the Broadcasting Standards Authority (BSA), and lobby for an independent broadcasting licensing authority.

Support or establish independent self-regulatory bodies

The status of independent self-regulatory bodies mandated to oversee the conduct of the media varies dramatically across the countries surveyed. The challenges vary from strengthening existing agencies to establishing completely new structures at the same time these regulatory bodies are suffering from a lack of funds. There is agreement, however, on the value of such agencies in the coordination and implementation of compliance with media law and regulation. With such a consensus follows the role of media houses in creating and sustaining "their" media council and the role of donors in enabling such structural changes.

□ **Strengthen existing bodies**

The mere presence of existing legislation and enforcement may not adequately serve the intended purposes and conversely, it can have an unintended effect. For example, there was a call in Botswana to establish a body that would oversee the training of media practitioners, regulating the conduct of media and compulsory accreditation of media practitioners. The proposed body, it was argued, would be stronger and more stringent than the Press Council of Botswana. The expectation is that it would not only bring about more professionalism and higher standards, but that it would deal with public complaints against the media and help bring about more disciplined and responsible journalism.

□ **Create a new structure to regulate media organisations and standards**

In other more fragile countries, there was a call for a more basic regulatory structure that would establish a code of conduct or set of guidelines to be framed by donor agencies and to govern all media institutions supported in the country. It was argued, in the Somalian case, that evaluation and monitoring could be used to determine whether guidelines were adhered to and this should be a pre-condition for future funding.

End Notes

⁷⁰ See, for example, the latest Freedom of Expression Institute (FXI) report (2006a, 2006b) that finds that there is a dialectical relationship between rising censorship and the lack of delivery of socio-economic rights, underlining the importance that freedom of expression and access to information have for widespread development. Also see Norris (2006).

⁷¹ The Journalist in Danger Report (2004) documents cases of mistreatment of journalists in 9 member countries of the Central African Organisation for Media (OMAC) and Central African Newspaper Editors.

⁷² The countries covered in the 2005 report include: Angola, Botswana, Lesotho, Malawi, Mozambique, Namibia, South Africa, Swaziland, Tanzania, Zambia and Zimbabwe.

⁷³ The publication covers: Botswana, Lesotho, Malawi, Namibia, South Africa, Swaziland, Tanzania, Zambia, Zimbabwe.

⁷⁴ The proposal for the initiative may be found on the UNESCO website at http://portal.unesco.org/ci/en/ev.php-url_id=21384&url_do=do_topic&url_section=201.html

⁷⁵ The National Broadcasting Board is semi-autonomous and the Botswanan media, in general, are overseen by the self-regulatory Press Council. Personal communication (email) with Hendrik Bussiek, 10 November 2006.

⁷⁶ The broadcasting frequencies are regulated by the National Communications Authority that is under the Ministry of Communications; licenses are issued by the National Media Commission whose independence is guaranteed by the constitution. In general, the media industry is overseen by the Self-regulatory Ethics Committee set up by the Ghana Journalists' Association and the National Media Commission (statutory). Personal communication (email) with Hendrik Bussiek, 10 November 2006.

⁷⁷ The Tanzania Communications Regulatory Authority is appointed by the government whereas the media industry is governed by the self-regulatory Ethics Committee. Personal communication (email) with Hendrik Bussiek, 10 November 2006.

⁷⁸ Broadcasting is governed by the Independent Communications Authority of South Africa and the industry is monitored by the Press Ombudsman set up by media themselves. Personal communication (email) with Hendrik Bussiek, 10 November 2006.

⁷⁹ Zambian broadcasting is overseen by the Independent Broadcasting Authority, established by law but not implemented yet; the media industry is monitored by the Media Council, established by Zambian media. Personal communication (email) with Hendrik Bussiek, 10 November 2006.

⁸⁰ Angolan broadcasting is governed by the Communications ministry and National Council for the Media in charge (both state); media in general adhere to a code of professional standards (developed by media). There is no self-regulatory body yet, but also no statutory framework. Personal communication (email) with Hendrik Bussiek, 10 November 2006.

⁸¹ A number of government ministries are involved in licensing procedures, and there is no self-regulatory body for the media industry but a (dormant) statutory body. Personal communication (email) with Hendrik Bussiek, 10 November 2006.

⁸² Unlike the broadcasting licences and the issuance of broadcasting frequencies by government regulatory bodies, professional standards were established and are monitored by the Media Council of Kenya (set up by the Kenyan media). Personal communication (email) with Hendrik Bussiek, 10 November 2006.

⁸³ The Broadcasting Authority is appointed by the minister and Zimbabwean media are monitored by the Media Commission, also appointed by the minister. Personal communication (email) with Hendrik Bussiek, 10 November 2006.

⁸⁴ For example, see, "Call-In Radio: Too Explosive to be Allowed?":
<http://www.nationmedia.com/eastafrican/23082004/Regional/Regional2408200442.html>

⁸⁵ In Kenya, it was suggested that proper funding of the state broadcaster would increase its ability to deliver a public service remit by removing the need to compete for advertising revenue. While this view was not heard elsewhere, it is mentioned here because some state broadcasters in sub-Saharan Africa do rely on advertising.



4. Technology and equipment

Sustainability is a recurrent theme of the research. This chapter looks at the problems of infrastructure, cost-structure and access to finance. How can the infrastructural and financial sustainability of community, public and private media be improved?

4.1 Previous work

This section highlights research and projects that have surveyed the use or state of technology and equipment in African media houses. There appears to be a lack of information in this domain and the research that is sourced is limited.

Little recent and publicly-available research appears to exist on the newspaper industry in sub-Saharan Africa. One study by Banda (2004) provides an analysis of the newspaper industry in Zambia. The publication documents a number of case studies and concludes with an analysis of inhibiting factors in the press industry. Berger and Mgwili-Sibanda (2006) present a collection of case studies that examine the use of ICTs by “small-scale print media” in southern Africa. The edited publication considers the opportunities and constraints of transitioning small-scale print media to new ICTs and particularly open-source content management systems.

With respect to radio, Moheler (2006) examines trends and considers the impact of private radio in Africa, discussing an ongoing research project to test these effects. Warnock and Wickremasinghe (2005) stress the importance of radio and argue that radio should be viewed as an ICT. The publication discusses the Catalysing Access to ICTs in Africa (CATIA) project and a specific element within the project, CATIA 2b. This project sought to provide “in-station technology and access to technology at central hubs” of “small local radio stations”. The document offers a case study of Ugandan radio stations which received radio production equipment as part of the project to argue for the need to offer ICT support to local radio.

Perhaps the area that has been given the most attention of late is the contribution that new media – specifically the Internet and mobile telephones – can make towards achieving development goals in Africa. A current resource for a wealth of research on new media, ICT and Africa is *Research ICT Africa! (RIA)*⁸⁶ that is a research network specialising in policy and regulatory research. Gillwald (2005) is an edited collection of research by the network and examines ICT access and usage across 10 countries⁸⁷. Additional research has evaluated access and usage across some countries (Polikanov & Abramova, 2003), while other studies such as Norris (2002) and Okpaku (2003) highlight the growing “digital divide” on a continent

where – although mobile telephony has expanded greatly – access to the Internet is largely limited to those who can access it through work or educational institutes or who belong to high-income households. One of the most comprehensive sources for ICT data is the International Telecommunication Union (ITU), that publishes global data on the use, availability and implementation of ICTs. However, even the data provided by the ITU is patchy for many countries in sub-Saharan Africa.

The problems of implementation of ICT projects (ranging from lack of policies and guidelines for sharing and owning data to incompatible technologies) are identified in Bekele and Mequanint's 2005 study. Some, such as Wilson and Wong (2003), stress the importance of ICT policy analysis and reform while Hanna (2003) argues for the creation of national ICT policies. Alzouma (2005) urges a cautionary approach towards ICTs, arguing that mere provision of technology will not bring about a "leapfrog" in development for Africa.

Country-specific ICT studies can also be found. Adam and Woldekidan (2005) are credited with conducting one of the first comprehensive analyses of ICT usage and demand in Ethiopia, while Bekele *et al.* (2005) provides a case study of an ICT project in Addis Ababa. Omosa and McCormick (2004) look at media support in Kenya with a specific interest in rural access to communication services, such as fixed and mobile telephony, as well as radio, Internet and television access. This may be compared with the Kenyan government's efforts to establish ICT policies (Republic of Kenya, 2006). Because of the opportunities offered by new media and telecommunications, much research work is carried out by telecoms organisations but is not publicly available.

4.2 Survey of findings

There is widespread acknowledgement of the poor state of media infrastructure in terms of equipment, facilities and technical support, and the need for technological equipment and support was expressed across all countries. At the extreme end, the research in Sierra Leone identified that during the 10-year war, the media infrastructure was almost completely destroyed – newspaper houses were burned down, machines were wrecked. Even today, the national media union has no suitable place for its members to meet and some newspapers have no permanent offices. Stakeholders are also cognisant of the need not only to have equipment but also to install digital equipment in order to stay abreast of media developments globally. Interviewees in Nigeria and Senegal had witnessed the emergence of cost-efficient digital technology, and the transition from analogue to digital technology presented an opportunity to improve media practices.

“ Even if we have the best-trained journalists in the sub-region, without the necessary equipment we cannot operate efficiently. So we need computers, electronic equipment, to practise. ”

(**Betty Foray**, Owner and Managing Editor, *Evening Scoop*, Freetown, Sierra Leone)

“ If your station's transmitter breaks down, you can stay three months without working, the time to order and receive a new transmitter. So people could work on that type of technical support. There needs to be a systematic approach to that. ”

(**Oumar Seck Ndiaye**, Director of Radio Oxyjeunes, Senegal)

More generally, maintenance and technical support is a significant challenge and many media organisations are operating with poorly-maintained or very little equipment.

“ In one of the stations that we visited some time ago, there was a stone that was used to hold the console. A stone was pushed to hold the console. And the person who was there didn't even take it as anything. It was like a shock to us. This is a powerful media organisation that has given so much to the public. I discovered that the man who is manning it is always pushing the stone to support it. ”

(Father Victor Yakubu, Director General, Catholic Media Service Centre, Nigeria)

Interviewees across Nigeria, Kenya, Senegal and Somalia also highlighted the wanting and under-resourced state of many journalism training institutions and accredited university departments. The problem is amplified by the mushrooming of sub-standard journalism schools in countries such as Kenya.

“ Newsrooms are now way ahead of the classrooms in terms of technology, in terms of infrastructure, in terms of policies, in terms of media unit pluralism. That is to say, if you get a BSc Mass Communication, you go and work with The Guardian or... With NTA or FRCN, they have to re-train you. So, we don't think that it's a very good thing. ”

(Professor Ralph Akinfeleye, Professor of Mass Communications, University of Lagos, Nigeria)

Providing technological support does mean new transmitters and radio studios but also encompasses auxiliary equipment, such as generators. In countries where there is not a consistent electrical supply, radio stations require gasoline-powered generators. However, an interviewee in South Africa felt that many donors are not prepared to fund technological costs or cover incidental costs such as electricity.

“ The donors don't want you to have funds for salaries and new equipment or increases in rent and electricity. ”

(William Bird, Director, Media Monitoring Project, South Africa)

While the technological support was deemed important, it was stressed that refurbished, updated or redeployed technology will not bring about change on its own. Interviewees emphasised that sufficient training must be given on the equipment and a suitable plan for technological sustainability be put in place. For example, in order to reduce the level of vulnerability of its initiative, the UNESCO Media Project in Mozambique devised an operational strategy that included a technical sustainability system to ensure that appropriate technology choices were made, that took into account the available technical and financial capacity for equipment maintenance.

Unsurprisingly, there is general agreement that there has not been enough funding or resources devoted to media development, and that funding for strengthening and supporting the media is generally fragmented. At country or regional level, there is little sense of whether funding has increased over the past five years. Internationally, some believe that funding for media development initiatives may have decreased over the last five years. The World Bank holds the view that this decline – if this is indeed the case – is likely to be reversed in coming years. Within the Bank there will be a renewed focus on the role “free, independent and capital media” can play in good governance programmes. Private investors worry about the fiscal environment, the predictability of regulations and the relatively small size of most media enterprises.

4.3 Lessons learned

Few examples were cited of media development initiatives that provide funding for equipment and infrastructural support. The examples, however, illustrate a range of approaches adopted to strengthen media organisations at a tactical and strategic level. Because so few were mentioned, the lessons learned are associated with individual projects rather than the category of initiatives as a whole.

Activities in this area have included the provision of cash and equipment for community radio and sub-regional radio in Sierra Leone, the Media Trust Fund in Zambia, government subsidies for media houses and community media in Cameroon and Mozambique, and the provision of funds to sensitise viewers about programmes on business. The lessons learned from media initiatives to support media infrastructure and funding draw on the following organisations and projects.

Cameroon

The Ministry of Information offers a subsidy to private media houses. However, the scheme requires a number of criteria to be met. The initiative was critiqued by at least one interviewee as an “incentive programme” to support government action.

Challenges

Direct government funding to support media would benefit from a more transparent and non-partisan mechanism.

Mozambique

The government is funding the Social Communications Institute (ICS) that, with external support, is developing a network of community radio stations with a particular focus on rural areas.

What worked

The strategy for the initiative was deemed effective as it was designed to address specific needs and deliberately integrated into the national development strategy.

Sierra Leone

The Open Society Initiative of West Africa (OSIWA) supplied radio and studio equipment to the Community Radio Network (CORNET) to establish community radio stations in the country. The government of Sierra Leone then waived import duty equivalent to US\$38,000 on the radio equipment imported by CORNET.

What worked

The funding was designed to build infrastructure among a network of community stations, rather than to provide or replace equipment at individual, isolated media outlets.

Zambia

The Media Trust Fund, supported by external donor agencies, provides financial grants to both private and public media institutions in an effort to improve the capacity of domestic media. The strategic focus of the fund is on the development of rural community radio.

What worked

The project was deemed to be successful when the fund narrowed its scope to focus specifically on rural media, rather than on general media development.

Pan-regional solutions

Two potential solutions to the technological challenges faced were offered. First, a respondent in Cameroon suggested establishing a “regional maintenance centre” that would offer spare parts and service media equipment. A Nigerian interviewee suggested developing pan-regional purchasing cooperatives, which would help drive down the cost of technology for media outlets.

4.4 Considerations for future activity

The research illustrated that few media support initiatives provide exclusive funding for equipment or infrastructural support. At the same time, what is clear is that financial support of the media sector is needed. Accordingly, this section discusses financial issues primarily raised by private media practitioners. To this end, the section draws principally on a companion piece of AMDI research designed to generate an understanding of how to improve the investment environment for the media and to strengthen the private sector⁸⁸.

Private sector media operators believe that maintaining the growth of private media will require new commercial lending in higher-growth economies, while common sense suggests that donor support is required for low-income countries that cannot sustain large numbers of commercial media outlets – support that could be factored into the development policy and priorities of donors. Investors believe that there are investment opportunities across every type and size of media across Africa. However, while it is large-scale media enterprises that are best-placed to capitalise on larger-scale investment, much of the African media landscape is characterised by “small media”, such as community radio enterprises, some privately-owned, many supported through donor finance. These media – because they are able to broadcast in minority languages, for example – may find it in some respects easier to attract advertising revenue, simply because of their closeness to their audience, giving them a competitive advantage. However, there are concerns that the small amounts of advertising they can secure, because of the size of their audiences, will mean it will always be difficult to sustain a station by advertising. These outlets are unlikely to attract larger-scale or foreign direct investment.

There are three broad areas identified as necessary for private sector media development: cost cutting and improved efficiency; improving access to finance; and, increased advertising revenues.

Improving access to finance

It is important to provide financial support that can be customised to the various particular needs of a broad range of organisations, rather than one homogenous solution. The difficulty of accessing finance both for start-ups or established media businesses was noted as a key issue at the AMDI Private Sector Workshop in June 2006. Capital availability is considered less of a problem than the ability of the private media sector to access it. Media investment is considered by some not to be as well understood as other investment sectors, and media entrepreneurs or start-ups often have difficulty in providing collateral against loans in the form of land or properties.

Investment groups report that there is a dearth of suitably-sized private media enterprises in the region. For those wanting to make a minimum investment of US\$10 million, the enterprises are quite simply too small and the returns too low. The challenge, therefore, is for the private media sector to facilitate the growth of enterprises to the point where they reach a scale and size at which they may be of interest to investment groups.

The big operators will largely take care of themselves. There is, however, a market gap in helping bridge available capital and medium-sized private media ventures, that could be addressed by a combination of assistance, advice, possible bundling of projects and by generally reducing the currently prohibitive management costs of lending to these projects.

□ Tailoring finance, and bridging the finance gap

Return on Investment on a typical infrastructure investment (eg, a printing press) exceeds the normal lending cycle of local banks. A new mechanism is required, possibly on a regional basis, to underwrite long term debt that cannot be mobilised through local markets or financial institutions; or to assist by bringing smaller investments to market by bundling them, or assisting them to corporatise their operations. It would also be possible to use donor funds as concessions to mitigate risk for commercial lenders.

“ I do not personally want [grant] financing. This is the kind of financing that can get you confused quickly. The financing we need is the one that is made through supply of equipment. I would prefer financing with interesting reimbursement rates. We generate funds, therefore we can reimburse. This is the only kind of financing I am interested in. ”

(Khalil Gueye, Director, Generation TV, Senegal)

□ Improve utilisation of existing finance schemes

Schemes do exist to enable entrepreneurs to access finance. However, there did not appear to be widespread knowledge of existing media financing schemes such as the Southern African Media Development Fund (SAMDEF), for example. Other schemes such as the Nigerian Small and Medium Industries and Equity Investment Scheme (SMIEIS)⁸⁹ are under-utilised and much of the capital in the scheme has not been used. Support needs to be given at a country level to allow media enterprises to access such schemes, possibly through financing independent advisers or through supporting intermediaries who could act as brokers between entrepreneurs and financial institutions.

□ Facilitate the funding of equipment

One priority is to support physical media infrastructure through the provision, maintenance and upgrading of equipment. A majority of those at country, regional and international level believe this to be pivotal to the development of the sector within sub-Saharan African countries, in countries with a relatively stable political climate and growing economies and, more urgently, in less stable or post-conflict countries (eg, Sierra Leone, DRC, Somalia). Media infrastructure includes a spectrum of equipment ranging from transmitters and editing suites to cameras, offices and, in some cases, even desks. Looking ahead, trends in digitisation and media convergence are likely to increase the demands for support in this area, as media organisations struggle to upgrade and implement new technologies. This support can be achieved either through direct grants or through access to soft loans, possibly at regional level. In Zambia, it was envisaged that this could be along the lines of South Africa's Media Development and Diversity Agency (MDDA). Such a facility would allow media organisations – who often experience barriers to accessing finance – to develop on a sounder footing and to build capacity.

“ The donors have to study the environment first, they are going to invest there. They must also tell the beneficiary to contribute something. There is nothing that is free now. If they don't contribute something, they will think it's the donor's project; but if they contribute, they will see it as their project. ”

(Professor Ralph Akinfeleye, Professor of Mass Communication, University of Lagos, Nigeria)

Developing media markets and revenues

Across the continent there is a significant lack of audience research and monitoring. A number of Country Reports point to the importance of understanding more about audiences, primarily to inform advertisers (and grow the advertiser base), and to increase understanding of audience needs and preferences.

A core challenge to be addressed by media planners and buyers is the degree of fragmentation in the market, in terms of media outlets and populations, that are often comprised of multi-ethnic, multi-linguistic groups. For example, in Nigeria, no single agency can buy national coverage of outdoor advertising.

The boom in cellular telephony in particular brought vital advertising revenue into African media organisations. However, in the view of some media practitioners interviewed for this report, advertising revenue has been a double-edged sword. When an operator becomes a monopoly player in any market, the need for advertising disappears, with devastating results. There is also a view that telecoms operators are “in bed with particular media” and that there is a lack of open competition for their business. Governments are also key advertisers in many sub-Saharan African countries, but this too can be a mixed blessing. As one media operator points out, “it’s big money, but it comes with a price.” The challenge for the sector is to overcome its reliance on a few key players and to lower the base.

A future media support initiative or programme could examine means for playing a catalytic role in helping to establish better audience-tracking systems in newly emerging markets, and bringing together advertisers, media outlets and investors to address these issues.

Improving efficiency and cutting costs

□ Create mechanisms allowing organisations to share technical facilities

In Nigeria, it was suggested that smaller enterprises could form networks or unions to share facilities such as transmitters, or, at a micro-level, smaller pieces of hardware such as cameras, or even laptop computers. In addition, it was felt that facilitating the sharing of maintenance contracts (a view put forward from Cameroon, for example) might be useful.

“ *In Botswana, we have the state-of-the-art facility [in the form of the Mass Media Complex in Gaborone] and some of these facilities should be shared with the private sector. Donors can look into whether there is a facility that can be used by all stakeholders.* **”**

(**Marriane Nganunu**, Permanent Secretary, Ministry of Communications, Science and Technology, Botswana)

□ Identify opportunities for collective purchasing of equipment

The benefits of a more collaborative approach to the procurement of technology was also identified as a useful model that could be shared or replicated in other regions, whether across media networks or groups, or even regionally, across countries.

“ If we come from the regional angle and we go to buy equipment, for instance, ...instead of Nigeria going to buy four, the whole of West Africa will go and buy 20, and the prices will come down. So I believe in the regional integration and it will also attract investment. If they know we have a harmonised regional market, that what you do in Nigeria is the same thing you practise in Ghana, is the same thing you practise in Cote d’Ivoire, so the legal frameworks don’t change, the policies are the same, from [an ECOWAS point of view], good investors, somebody that has money, can invest in Nigeria all through here, and one big headquarters will manage the rest. ”

(**Mary Udumah**, Head Corporate Planning and Research, NCC, Nigeria)

“ They could do things in a better way. The donor community can help facilitate maintenance of equipment. Although I’m not a technician, I would be interested in putting up a regional maintenance centre, that will take care of Gabon, Cameroon, Senegal, etc. We’ll know that we can easily get spare parts for our machines. There are lots of initiatives like that that would have positive effects on the economy. I think we should apply the Chinese saying that ‘you should teach a child how to fish instead of giving him a fish to eat. ”

(**Sillar Mactar**, Chief Executive, Spectrum Television, Cameroon)

□ **Support the upgrading of equipment and skills**

Funding of ICT programmes is also a priority, both in terms of support to upgrade and improve infrastructure and also to introduce and develop ICT skills among media practitioners.

Some of the other challenges and areas for support here are related to the tax and fiscal regimes that inhibit growth⁹⁰. These are also areas in that an initiative could assist in supporting debate and private-public dialogue to create a more favourable investment climate for media.

End Notes

⁸⁶ The website for the network is: <http://www.researchictafrica.net>

⁸⁷ The study covers Botswana, Cameroon, Ethiopia, Ghana, Namibia, Rwanda, South Africa, Tanzania, Uganda and Zambia.

⁸⁸ The following part of this section chapter draws principally on a companion piece of research designed to generate an understanding of how to improve the investment environment for the media and strengthen private sector. To avoid replicating research already being undertaken as part of the main body of the AMDI Research, the emphasis for this piece was primarily on the investment community, with additional interviews conducted with a number of those representing the media and advertising sectors. See also the Report of the AMDI Consultation Meeting of Private Sector Owners and Operators, Johannesburg, June 2006.

⁸⁹ The SMIEIS is intended to stimulate economic growth and development, develop local technology and generate employment. Participating banks have set aside considerable funds for financing SMIEIS.

⁹⁰ Examples cited include restrictions on foreign direct investment and exchange controls; stamp duties on foreign loans; high levels of taxes on imported media consumables; and special taxes on mobile operators.



5. Professionalisation

What can be done to strengthen the profession? This chapter looks at what the professional organisations, training bodies, universities and media companies can do to raise standards and improve capacity.

5.1 Previous work

The following section provides a brief overview of literature and projects working under the umbrella of media professionalism. This review is divided into three sections and begins with an overview of journalism training.

Training needs

The training and professional development of journalists is perhaps the most common activity of agencies and organisations supporting and facilitating media development in Africa. The West African Journalists' Association (WAJA) is one such organisation. WAJA was established in 1986, in Dakar, Senegal as the umbrella association for journalists' associations and unions in 16 countries that make up the Economic Community of West African States (ECOWAS). The South African National Editors' Forum (SANEF) has commissioned two national skills audits among journalists and first-line news managers (Steyn & De Beer, 2002, 2004, 2005). Specific deficits identified include those ranging from writing and editing competencies to management skills. Kantumoya (2004) is both a handbook for, and an analysis of, investigative reporting in Zambia. The report argues that investigative journalism is constrained in Zambia and concludes with recommendations such as increasing investigative training, forming alliances amongst investigative journalists and changing laws around access to information. Along similar lines, Forbes (2005) offers a practical guide to investigative reporting. Meanwhile, the Open Society Institute has published *Covering Oil: A Reporter's Guide to Energy and Development* (Open Society Institute, 2005).

Many international NGOs and intergovernmental organisations, including the BBC World Service Trust, Internews, Friedrich-Ebert Stiftung, Panos, the Thomson Foundation, the Reuters Foundation and others, plan and run training programmes across a number of African countries, and these organisations have undertaken a body of research and evaluation studies, as well as evolving methodologies to address the impact of such training. In 2006, UNESCO initiated an Africa-wide training mapping survey, that will seek to rate training agencies against established criteria and will result in the setting up of a number of centres of excellence for training. The project will aim to ensure that training is more readily accessible and the project builds on work previously carried out on developing a model curriculum for training.

Challenges and constraints

There is a body of research that identifies challenges and constraints to good journalistic practice across the continent and in specific countries, including, for example: unclear institutional editorial policies; legal impediments; and, lack of resources ranging from equipment to transport. Some of those organisations producing valuable research in this arena – particularly those relating to issues of press freedom – have been mentioned in Chapter 3, and their websites are invaluable sources of information. Literature has also focused on ethics (Kasoma, 1996; GJA, 2002), journalism accreditation (MISA, n.d.) as well as the challenges of election coverage (Mateus, 2005).

The suppression and abuse of journalists continues to be a threat for media practitioners. Many African countries retain legislation that allows them to bring criminal charges against journalists, and some have used this to silence dissent and these violations are logged by organisations such as Reporters Without Borders, Amnesty International and Journalist in Danger.

In Nigeria, Akinfeleye (2003) examines the roles and responsibilities expected of a good journalist. He argues that the biggest challenge faced by journalists is that of religious fundamentalism. Akinfeleye believes that journalists must become more rounded, must learn about their history and culture, and must appreciate difference. The author also asserts that the proliferation of journalism training centres has not drastically affected the quality of Nigerian journalism, and he stresses the need for a strong symbiotic relationship, between the four media stakeholders – the people, the politicians, the publishers and the press – as the basis for effective social responsibility of the press.

Also in Nigeria, Mallam (2005) focused on development news by journalists. Based on a survey of journalists and content analysis of six selected Nigerian newspapers, the paper discovered that there were similarities between the Nigerian journalist's understanding of what constitutes news and that of his counterpart in the West. Much work done in the West that builds upon Galtung and Ruge's (1965) seminal work into what constitutes news, finds that the ability to identify newsworthiness is a skill fostered by the culture of the newsroom. In line with this, Mallam concludes that the only inhibiting factor against the implementation of a development news philosophy is that the traditional newsroom practices and operating procedures have not changed significantly to reflect the new demand for the application of development principles in news reporting.

Country-specific reports

Ghana appears to be a favourite for academic research into journalist practice, with a large amount of research on Ghanaian press (Asante, 1996; Hasty 2001; 2006; 2005a; 2005b). Diange (2005) charts the evolution of the media in Senegal and discusses the developments from the perspective of media professionals, while Taureg and Wittman (2005), in an edited collection, highlight, among other topics, the working conditions of journalists in Senegal. Akinfeleye (2003) covers multiple topics pertaining to professionalism in Nigeria, including journalistic standards, education and professional ethics. Meanwhile, Akinfeleye and Okoye (2003) offer a history of media in Nigeria. Country-specific literature also exists for Angola (Mateus, 2005), Tanzania (Ramaprasa, 2001; 2002; 2003) as well as Uganda (Mwesige, 2004; Onyango-Obbo, 1999; Robbins, 1997).

5.2 Survey of findings

There is widespread acknowledgement of – and disappointment at – the generally low levels of professional, ethical, management and technical standards in the media sector in Africa, despite recent improvements that are referred to in many reports. Training initiatives being carried out by a whole host of African and international organisations and institutions are praised, but deemed insufficient. Four factors were identified as contributing to the low standards.

- ❑ **Insufficient or poor-quality training and training institutions**, leading to journalists without basic skills. This lack of professionalism results in poor-quality, unbalanced or even libellous content being published or broadcast.

“ People start a school here with clerks and whatever, and they are saying [that] they are going to offer a diploma in broadcast production and journalism. [Yet they] don't have a computer, don't have a camera...”

(Academic, Kenya)

- ❑ **The rapid growth of the media** in some countries, that has put a strain on training institutions and led to a dilution of professionalism. This phenomenon has been seen, for example, in the “junior-isation” of newsrooms (South Africa) and in the wide-scale deployment of untrained journalists (Nigeria).

- ❑ **Low salaries and status, and the prevalence of “brown envelope” journalism** in some countries (where journalists expect to be paid for covering a story), making journalists vulnerable to corruption and intimidation. It is sometimes questioned how it is possible to expect a poorly-paid journalist to investigate and expose people who have become rich through criminal means.

- ❑ **Skills-draining**, where NGOs and donor agencies unwittingly deplete the journalism profession by offering the more competent media practitioners higher salaries than they are earning as practising journalists.

“ It's very difficult to have a journalist career because at the point where you have child or family responsibilities, then what happens to your very thin and probably risky career, if you are on an independent paper – and here comes Oxfam, or UNICEF or the World Bank or a commercial company saying they want a communications officer, paying a salary, so the brightest people then get hauled off, taken out of journalism. ”

(Paddy Coulter, Director, Reuters Journalism Fellowship Programme)

5.3 Lessons learned

The area of professional development and capacity-building, in the form of journalism training in particular, was the key focus for those interviewed in all the sectors and at all levels – country, regional and international. There are multiple organisations reported as being involved in professional development work, from national governments in Africa (subsidising journalism and media departments in universities and specialist training institutes), to international governments, to specialist NGOs. Equally, there are multiple professional development initiatives spanning a range of disciplines. The majority of professional development activity appears to be focused on news programming and journalism with less emphasis on management development and broader-based content development. One of the key issues raised in relation to, and relative to, the volume of professional development activity was – for the most part – the obvious lack of any form of systematic impact assessment.

The overview and examples below cannot, in this research summary report, do justice to the huge volume of courses and initiatives being undertaken. The examples below are illustrative only and more comprehensive detail can be found in the individual Country Reports.

The main professional development initiatives have been grouped under four main headings:

- professional standards and journalism skills;
- issue-specific journalism;
- media management; and,
- technical skills.

Media development initiatives focused on **raising professional standards and improving journalism skills** have embraced the following types of activities: establishing schools of journalism, university departments of journalism and centres for journalism and communications; initiatives to improve journalist training curricula at universities; and, in-house training and internships.

Issue-specific journalism training programmes include business reporting, legal reporting, reporting gender-sensitive issues, development, environment, health issues, human rights issues and elections coverage/monitoring, amongst many others.

Media management training also spans a broad range of skills, including decision-maker training, general management training, organisation-building, financial management and training communities of interest to set up and run their own media outlets.

Technical skills training programmes have included ICT skills in newsrooms, journalists' use of ICTs and the Internet, improving the quality of journalism content through enhancing knowledge of ICTs and training marginalised groups (women/ rural) on the use of ICT for local production, and new broadcast technologies (editing and digitisation).

Organisations and projects offering initiatives focused on media professional development, drawn on for this section, include the following.

Support to educational institutions and training programmes

Angola

The **Centro de Formação de Jornalistas** (Journalists Training Centre) offers refresher courses for journalists who are already working in the media and short courses to newcomers.

Ethiopia

A joint effort between **Addis Ababa University** and the **Norwegian Agency for Development Cooperation (NORAD)** resulted in the founding of the **Gimlekollen School of Journalism and Communications (SJC)**. The SJC consists of an academic unit for graduate studies in journalism and communications and a centre for journalism and communications that includes a research unit, training, continuing education and ICT.

Kenya

The **United States International University (USIU)** received government approval and established a Bachelor of Arts in Journalism, increasing the vibrancy of journalist courses in Kenya.

Somalia

The **University of Hargeisa** currently offers a Bachelor of Journalism and Mass Communication in cooperation with the **Indiana University of Pennsylvania (IUP)**.

Issue-specific reporting

Uganda

The private telecoms company **MTN**, in conjunction with the **Uganda Management Institute (UMI)**, sponsored a workshop for 20 journalists to be trained in business reporting and to better understand the mobile phone industry.

Ghana

The Third World Network (TWN) has held a series of workshops training journalists in how to cover the mining industry, while the **Centre for Democratic Development** has conducted workshops on how to report academic research and **Journalists for Human Rights** has held human rights courses at the African Institute of Journalism.

Sierra Leone

In 2003, the United Nations Development Programme (UNDP) provided funding to organisations such as **Conciliation Resources** and the **Sierra Leone Association of Journalists (SLAJ)** to train 60 local journalists to monitor local government elections.

Zambia

Transparency International Zambia, in collaboration with **Panos Institute Southern Africa (PISA)**, engaged in specialist journalist training and developed a training manual on how to cover issues of corruption.

Media management

Zambia

The **Zambia Community Media Forum (ZaCoMeF)** engaged in training for community radio station board members to increase understanding of their roles and responsibilities in the management of the radio stations.

South Africa

The **Sol Plaatje Media Leadership Institute (SPI)** and the **Southern Africa Institute for Media Entrepreneurship Development (SAIMED)** ran a scheme for entry-level media managers on financial management, business management, sales and marketing. The programme involved a workshop as well as mentoring.

Somalia

The **Somali Organisation for Community Development Activities**, with financial support from **Oxfam-Novib**, held a 10-week training course for members of a Somali association of newspapers. The course focused on capacity-building and dealt with how to set up and run an effective association.

Technical Skills

South Africa

The **School of Journalism and Media Studies** at Rhodes University established “**Highway Africa**”, an initiative aimed at increasing the quality of journalism content through enhancing knowledge of ICTs.

Zimbabwe

E-Knowledge for Women in Southern Africa (EKOWISA) is an NGO offering training to rural and urban township women on the use of ICTs to facilitate selling goods, such as horticultural products.

Zimbabwe

The government-appointed **Media and Information Commission** (MIC) is working on a programme to improve journalism training curricula in all colleges. The IMC asserts that this initiative is meant to create uniformity within the training programmes, and also to check the quality of the training being offered by training institutions.

Nigeria

Nigeria has multiple initiatives – run by the Catholic Media Centre, the National Broadcasting Commission (NBC), the Nigerian Guild of Editors (NGE), the Nigerian Union of Journalists (NUJ) and the Media Trust, all training journalists on new broadcast technologies.

Professionalisation – lessons learned

Two overall challenges dominated the comments provided by interviewees on professional development initiatives: 1) the imperative for the content of training programmes to be country- and culture-specific; and, 2) the need for monitoring and evaluation.

- There is a strong call for the content of training programmes to be more relevant. This includes an on-going need to revise and modernise university curricula to reflect the political contexts and practical needs of each individual country's media. In addition, there is an increasing requirement to introduce technological developments into tertiary level training courses. In general, programmes are criticised as having too much focus on Western values and a lack of cultural sensitivity. Training is often superimposed and not sufficiently tailored to specific conditions. There is a lack of country-specific examples and an over-reliance on examples from Western media.
- Monitoring and evaluation processes are largely absent from projects focused on professional development of media practitioners. Consequently, there is little evidence of systematic, formal impact assessment and baseline measures of professional development efforts. Some cautioned that the requirement to show short-term results, in order to continue to attract funding, can result in a lowering of standards. It was agreed that monitoring and evaluation activities should be built into training programmes as an ongoing process.

Other inputs suggested a number of other practices that have worked. They include.

- a more thorough investment in an institution over a greater period of time rather than support for short-term courses;
- partnership schemes;
- in-house training;
- multi-phase training; and,
- technical skills training.

Each of these practices, and the challenges associated with them, are outlined below.

1. Institutional investment

Strategic planning and long-term funding to establish university departments and build institutions to place a greater emphasis on practical, in addition to theoretical, training are reported to be successful.

Challenges

More is not better. The overall increase in the number of schools of journalism in the countries surveyed has not resulted in higher standards. Mushrooming of many sub-standard journalism schools was reported in Kenya and Nigeria, for example. Further integration of theory and practice in journalism training has been called for. In addition, schools would benefit from recognised standards for student entry and tuition. Few recognised journalism accreditation schemes exist.

2. Partnerships

Professional development programmes based on a diversity of partnership arrangements have been deemed effective. These have included university/NGO partnerships as well as distance learning certificates in conjunction with international universities (eg, University of Hargeisa and Indiana University of Pennsylvania).

Challenges

Partnerships that involve participants attending training programmes outside the country, while benefiting the individual, were on the whole not deemed the best use of limited resources. A preference was expressed for bringing experts to the host country. This facilitates greater numbers accessing the training as well as the training being more customised to the needs of the cultural and material reality on the ground.

3. In-house training

Training programmes are more effective when they are designed and delivered in collaboration with beneficiary media organisations. Rather than training individual journalists from multiple organisations, there is greater value in focusing on media practices in the organisational context within which the journalist operates.

Challenges

In-house training suffers from short-term funding and the lack of clearly defined objectives. In many cases, organisational and individual training needs should be more clearly defined at the design stage. It is also important to secure management ownership of the process, that often demands an institutional commitment to change

4. Multi-phase training

Emphasis should be on long-term practical training with multiple phases, from workshops to “on the job” and mentoring programmes with support networks and facilities. In Zambia, for example, managers and senior executives were trained on understanding their decision-making roles, in concert with media skills training. This phased training comprised a number of re-enforcing components together with on-going mentoring programmes. Online training was also cited as an initiative that extends beyond the trainees’ access to training and beyond the life of donor funding.

Challenges

Multi-phase training, which takes a longer term view of developing skills incrementally, is susceptible to lack of funding as well as employer concerns about turnover and lack of loyalty. Economic stabilisation, and the maturation of the media sector will inevitably create more vibrant media sectors for long-term improvement of professionalisation.

5. Technical skills training

Training media practitioners on ICTs and the Internet is improving the overall quality of journalism through access to a wider range of sources and perspectives. This has been evidenced through the success of the Highway Africa initiative convened by the School of Journalism and Media Studies at Rhodes University in South Africa.

Challenges

The value of this training is recognised, but there are not sufficient programmes in place. Simultaneously, there is a need to avoid training on equipment that is unavailable on the ground.

5.4 Considerations for future activity

Raising professional standards across the media sector is thought to be imperative for the media sector's health and robustness, and scaling up training programmes is identified as the overarching priority for media development in sub-Saharan Africa by most of those interviewed in this research project. Those who did not place it at the top of their list of priorities included it somewhere near the top.

There is a strong belief that higher professional standards will never be achieved by support for generic or *ad hoc* training programmes.

“ We need some basic skills. We need training in terms of the ethics of the profession. Many people are shocked by what we publish in Nigerian newspapers, libel. It is as if there is no law, nobody is afraid of anything. I think we need that area of training. It will help in reducing inaccuracies and all that. ”

(Kabiru Yusuf, Editor-in-Chief, Media Trust Ltd, Nigeria)

A number of different types of activities were called for to strengthen and improve the professional standards of media practitioners. These can be grouped broadly under three areas of engagement: 1) activities aimed at media organisations; 2) institutional support for colleges, universities and other training bodies; and, 3) accreditation schemes for courses.

Media organisations⁹¹

□ Deliver professional development programmes at multiple levels within the hierarchy of media organisations

Such programmes should be designed in a strategic and systematic manner with involvement and participation by management to facilitate “buy-in” and to build on skills gained through follow-up. However, while the emphasis is on a holistic and integrated approach, that takes a long-term view of training, this does not preclude *ad hoc* courses on specific issues or topics.

“ Media organisations should encourage more and more on-the-job training where people can be trained even as they work in different newsrooms. A programme will become successful if the media houses themselves are convinced of the importance and [are] prepared to pool their resources together. ”

(Tanzania Country Report, p. 52)

□ Provide management courses for all levels of managers

These are an important component of training, and an element that is not currently well-addressed. The skills needed range from newsroom management to business skills.

□ Create training in specialist disciplines.

The training of journalists in specific topics, such as health (especially HIV/AIDs) and education, as well as creating greater in-depth knowledge of business and finance issues, are seen as critical, not only in terms of creating a better understanding of the issues amongst journalists, but also to ensure informed audiences and create a demand for accountability and action at a national level.

The range of courses called for include the following:

Courses	Skills
Basic, mid-career, and senior journalism skills/refresher courses	Technical skills
Media ethics and professional skills	Management skills
Media law (country specific)	Training trainers
Research skills	Specialist courses (e.g. on business)
Investigative Reporting	Budget Monitoring HIV/AIDS and health topics Environment and Climate Change

❑ **Prioritise the retention of trained professionals**

In concert with training, retention strategies are vital to ensure that media houses do not lose the return on their investment in human capital – this might necessitate input or consultancy advice on appropriate programmes and incentives. Further, the need to incentivise trainees should not be underestimated. In some cases, incentives compensate for a loss of earnings for attending such courses, although participation in such courses can also offer significant professional opportunities for those completing them.

“ *Once the training is done they should also institute a mechanism where they will be able to monitor the beneficiaries because I think the people who are trained are left on their own without any necessary guidelines.* ”

(Osabutey Anni, Studio Manager, Radio Valco, University of Cape Coast, Ghana)

❑ **Provide capacity-building in new media skills**

Also mentioned with regard to infrastructure, training on new technology (including the use of digital media and digital editing tools) is identified as a need in a number of countries including South Africa, Tanzania, Zambia, and Zimbabwe.

❑ **Facilitate exchange programmes for media practitioners**

Within Africa – across institutions and between countries – professional exchange programmes are important ways of encouraging peer-to-peer learning and sharing best practice.

❑ **Importance of commercial and management skills**

Private-sector operators and owners pointed to the lack of commercial and management skills as a key shortfall. Without these skills media fail, despite their editorial reputation. The need for the private sector to coordinate efforts to deliver training at scale is proposed, and a start has been made by some media houses in this direction. Building these skills will enable entrepreneurs and leaders of private media operations to run viable business concerns, with appropriate budgeting, cost controls and business forecasts.

❑ **Build in evaluation mechanisms**

Monitoring progress, longer-term mentoring and delivering ongoing feedback are important in order to measure impact and ensure that skills acquisition is sustained. Such evaluation is needed by those delivering training, by institutions hosting such programmes and by trainees themselves.

Support for Educational/training institutions

□ Strengthen existing media training programmes and courses at universities and other training institutes

This can be achieved through sharing best practices regionally, through harmonising curricula and by bringing courses up to date. In some cases, training centres do not have equipment on which those training for broadcast media can practise. Establishing centres of excellence for training, or regional media learning centres, would be one way of better addressing needs. Online learning programmes were commended as a relatively low-cost way of offering high-quality training programmes to institutions that have access to the Internet.

“ Support existing journalism courses and long-term mentoring in ongoing journalism training, such as the BBC World Service Trust’s iLearn programme. ”

(Hassan Heiss, Head of Distance Learning Journalism Training, University of Hargeisa, Somaliland)

□ Provide professional development courses to university staff, teachers and those delivering training courses

These efforts will raise the overall standard of the programmes in the longer term. Such initiatives are likely to range from training academics at the highest level of curriculum delivery to “training the trainer” programmes within media organisations.

□ Integrate other key components of course delivery within educational institutions

Other elements in the support for educational institutions would include: curriculum development; funding scholarships; exchange programmes for students and faculty; and supply of books, materials and equipment.

Accreditation

□ Establish quality control criteria at the individual level

There was a call for funding to be directed towards accreditation programmes in partnership with trade or professional journalist bodies, which would ensure that training programmes comply with recognised standards and can be quality-controlled.

□ Engage the commitment of relevant professional bodies

These entities should also be encouraged to participate in raising standards by ensuring that accreditation schemes, once in place, become a qualifying criterion for membership (although this in itself will not overcome the problem of unregistered, untrained journalists).

End Notes

⁹¹ Those delivering training programmes need to recognise that internal and external barriers (such as the political environment, at a macro and micro level, lack of commitment by managers, and so on) frequently militate against the implementation of training. Institutional support and buy-in from media enterprises at the point of delivery are important strategies to reinforce training programmes, as is longer-term mentoring and follow-up or refresher courses.



6. Supporting Local Content Production

This chapter looks at how media content can become more relevant to the communities it serves. What would make it easier to increase local “relevance” and what are the comparative strengths of state, community and private media?

6.1 Previous Work

The following brief review highlights work on the production and consumption of local content. On the production side, the most prominent catalyst of local content is community media. Among other initiatives is the World Bank programme “Civic Engagement, Empowerment and Respect for Diversity”. Within this, and of particular note, is the “Voice Through Media” component, which examines possibilities of civic empowerment and government accountability through community media. This umbrella initiative involves major players in community media such as Article 19, Search for Common Ground, Radio Netherlands and the World Association of Community Radio Broadcasters (AMARC).

AMARC is a leading network of community radio broadcasters publications which vary from case studies of community media to “how to” handbooks on running community radio stations⁹². In one example, AMARC Africa (2004) examined the extent to which community radio stations in Africa cover sustainable development themes, issues or topics. The report concluded that “community radio stations are still struggling with producing content on sustainable development”.

Academics have also studied community media and range from Madamombe (2005), who writes about the empowering impact of community radio, to Tacchi (2002), who articulates the challenges faced by community radio. Focusing outside of radio and onto the printed word, *The State of the Press in Africa* (2005, African Press Agencies), decries the declining role of press agencies throughout the continent. Meanwhile, Fiske de Gouveia (2005) writes about the possibility of establishing a pan-African broadcast television network – an “African Al Jazeera”. Similarly, efforts are underway by Kenyan national Salim Amin to raise sufficient capital (US\$21 million) to start up an African television news channel, Africans Together Vision (ATV).

A second content initiative for television is the series *Africa: Open for Business*. The series was initially conceived for an American audience in order to shift the perceptions Americans have of Africa. The goal was to recognise the problems the continent faces but also to highlight and illustrate success stories, and the series sought to do this through showcasing successful business people. While the project initially faced challenges securing funding, the World Bank funded the pilot episode and eventually provided support for the series. *Africa: Open for Business* has now screened in the US and UK and has been packaged and made available to TV stations across Africa⁹³. With a successful first series, it is hoped that the programme will continue and perhaps inspire similar content initiatives. The work of GemTV in Ethiopia also stands out as an example of local content production in making community films and training community filmmakers. For GemTV, the means is as important as the end, as the organisation teaches film production as an empowerment tool for disadvantaged youth. In addition to producing local content, GemTV also has a mechanism for youth trainees to graduate with official accreditations.

Consumption

From an audience perspective, research on the demands, interests and values of local audiences is needed to tailor local content. Data on media consumption patterns and preferences is not available in many countries in Africa. However, some data is accessible. For example, the Audited Bureau of Circulation (ABC) publishes figures on newspaper circulation in South Africa (ABC, 2006) and also compiles data for Botswana and Namibia. Thapisa and Megwa (1998; 2002) have studied readership and audience data in Botswana.

The South African Advertising Research Foundation (SAARF) is a non-profit organisation founded in 1974 to provide comprehensive and valid media audience and product consumption measures and is funded by a levy on advertising revenue from media organisations. In addition, a growing number of commercial enterprises are focusing on gathering this material, though inevitably, much of it is not publicly available except at a generic level. For example, the Steadman Group has offered media monitoring and audience measurement services for over 20 years and has offices in Ghana, Kenya, Uganda, Tanzania and Zambia⁹⁴. Additionally, an industry group, the Pan African Media Research Organisation, launched in 2005 a data homogenization project to collect and standardize demographic data across 12 countries⁹⁵.

Media Monitoring

Many media development organisations have devised methodologies to track the quality, frequency and amount of coverage of certain issues, themes and groups by media outlets in Africa – what is known as media monitoring. Media monitoring is an important area for media development organisations because it allows stakeholders to understand the extent to which the media are reporting news in a fair and balanced manner. It can also make an important contribution towards evaluating the overall quality and ethics of reporting and representation of special interest groups in the media.

This area of research is rich in organisations working in the field, including, among others, Gender Links, Panos (with various offices across Africa), the Media Institute of Southern Africa (MISA) – who describe this work as their ‘flagship activity’ – the Open Society Institute for Southern Africa (OSISA), the Netherlands Institute for Southern Africa (NiZA), the Humanist Institute for Cooperation with Developing Countries (HIVOS) and the Media Monitoring Project of Zimbabwe. A range of previous studies, with an array of foci are freely available on websites. Foci include gender (for example, Gender Links’⁹⁶ research on the

representation of women in the media), and election coverage (MISA⁹⁷, MMP, Panos and others), as well as the Media Monitoring Project of South Africa. Many of these organisations are also involved with advocacy, lobbying and other media-related activities and have built up a depth of insight and knowledge about the areas in which they are working. This type of media monitoring is distinct from the commercial media monitoring of advertising or PR campaigns.

Hanlon (2005) provides a comparative analysis of 2005 election coverage of public and private media in Mozambique. Meanwhile, a similar analysis of election coverage in Zimbabwe may be found in Media Monitoring Project Zimbabwe (MMPZ) (2001; 2002). Likewise, Tapfumaneyi (2005) provides an analysis of election coverage of female candidates in Zimbabwe. In Kenya, a report from Consumer Insight provides comparative statistical analysis for both TV and radio in Kenya (Consumer Insight, 2006). The report gives a breakdown of the most-listened-to radio and most-viewed TV in the country in the month of January 2006. Data was gathered using a random sample drawn from various district towns in the country.

The Southern African Gender and Media Audience Study was an extensive research effort that attempted to establish the degree to which women and men interacted with news. The Mozambican chapter of the report found, among other things, that television was the main source of news for women (56%), while radio was for men (42%). It also concluded that, in regional terms, newspapers were more popular in Mozambique than in the rest of the region. Afrobarometer (2003) is a 12-country⁹⁸ public opinion survey which confirms radio as the main source of political news for many Africans and also qualitatively examines the value placed on press freedom by audiences. Additional Afrobarometer publications have explored similar themes (Bratton, Mattes and Gyimah-Boadi, 2005).

6.2 Survey of Findings

Distinctive and original media content is seen as a vitally important component of expressing cultural identity. Many commentators see support for local content production, or facilitating access to a wider variety of content, as a pressing issue⁹⁹. The value of local content was seen in its ability to reflect, capture and archive local traditions, realities and cultures¹⁰⁰. The challenge is primarily about how to fund and enhance domestic capacity to produce entertainment or documentary content that is diverse and reflective of local culture. Also there is a need to include programmes which provide information that is educational, promotes better health and addresses other development issues. In addition, there is widespread support for improving the quality of editorially independent news and current affairs.

Common criticisms are that state-controlled media across many of the surveyed countries deliver material that conforms too closely to the government or ruling party perspective; while many television, newspapers and radio outlets reflect the views of a narrow segment of the population, often the voices of the urban educated elite. Community and private media are widely acknowledged to cater to populations and regions under-served by other outlets, and – particularly through radio – to provide an important educational and information source for those areas marked by low literacy or low access to mainstream media.

There is an additional challenge: how to harness the existing substantial reach of state-owned broadcasters and, through a more creative commissioning process, to stimulate in-house producers and local production houses to take advantage of the wide reach.

6.3 Lessons learned

The following section draws upon comments made by interviewees across all 17 AMDI countries. In addition, a broad range of initiatives informed the findings and accompanying challenges outlined below concerning local content production.

Initiatives to stimulate local content production and efforts to develop a process for more editorial independence are diverse and include: producing radio programming in Zambia to facilitate engagement by rural women in the political process; television programmes to enable consumers to comment on media practice in Nigeria; innovative methods of producing and distributing local content to marginalised communities in Somalia; building audiovisual capacity for the production and export of local content in Senegal; producing content for local communities in Zimbabwe, and; the investment of private media funds in producing local content in Tanzania.

Within the community media sector, media initiatives have focused on activities including the creation of community radio infrastructure in Mozambique and building a community radio station for women in Senegal.

Media monitoring and other research studies have been employed to analyse content focused on a range of issues, including elections and gender-related topics. This work is included in this section to recognise these studies as a resource to understand how content production varies across different media outlets.

The Interconnection of Content

The issue of local content production was seldom viewed in isolation. Instead, it was seen as part of an “interrelated” (Mozambique) collection of challenges linked to the operational environment and institutional capacity of media. Improving or creating local content was seen as contingent upon a conducive and enforced legislative environment, funding, and availability of training and trained workers with an appropriate skill-set, as well as an enabling environment within that to practise (Kenya, Mozambique, Nigeria, Tanzania, Uganda, Zambia, Zimbabwe).

Depth and Breadth

The challenge of content creation was discussed as an issue of both depth and breadth. Depth pertains to the production value, standards and accuracy of content, whereas the breadth of content referred to the availability of local, national and pan-regional content. One Zambian interviewee argued that establishing exemplary cases of strong local content could set a bar for other media to work towards.

Local Content

Zambia

The **Zambia National Broadcasting Corporation** and **Panos** launched the initiative “**Development Through Radio**”, which provided a platform for people – particularly women – in rural areas to discuss, raise issues and receive feedback via the radio from government officials.

Nigeria

The **Nigerian Communications Commission** established an initiative called the “Consumer Parliament”, which is a monthly media-based process and forum that is used to settle disputes between media operators and consumers. The telecast forum allows media consumers to forward complaints to media organisations and have them addressed on-air.

Gleaners Online is Nigeria’s first online newspaper. Established in November 2003, the newspaper seeks to provide independent, Afro-centric news content online.

Somalia

Based in Somaliland, the **Academy for Peace and Development** has attempted to sensitise the public to environmental issues by producing films and distributing them for free to local TV stations.

Tanzania

The media company that owns ITV and Radio One allocates 20% of its budget to fund country-specific programmes, often with the aim of sensitising the public to specific issues such as HIV/AIDS.

Senegal

The **Media Centre of Dakar** provides training programmes for young people to use media equipment and to produce television and film content of local and national relevance.

Zimbabwe

E-Knowledge for Women in Southern Africa (EKOWISA) is an NGO that offers training to rural and urban township women that focuses on developing content that captures cultural aspects of rural communities, in an effort to capture aspects of Zimbabwean culture and ways of life for the benefit of future generations, and also to preserve such practices.

Senegal

The **Association des Femmes pour la Communication Alternative** (ALTERCOM) established Manoré FM, the “Voice of Women”, a community radio station specialising in women’s issues and development issues such as maternal health.

Media Monitoring and Research

Botswana

The radio drama *Makgabaneng* is intended to raise awareness about the country’s HIV/AIDS crisis through a partnership with the Department of Media Studies, University of Botswana, which is helping to research programming impacts.

South Africa

Gender and Media Southern Africa (GEMSA) and the **Media Monitoring Project** (MMP) collaborating to promote equal rights and a voice for women.

Local Development

The majority of those surveyed feel that support for local content should be provided through efforts to invest in local production houses or to provide support for broadcaster in-house production. The need was also expressed in the context of developing domestic skill sets in terms of talent and practitioners.

Local content was also described as a “sensitive issue” (Ethiopia) with some interviewees wary as to whether international organisations were capable of identifying and being sufficiently sensitive to and aware of local realities. Instead, international organisations were

seen as having a funding or facilitative, and not creative, role. A South African media development veteran clarifies this.

“ Donors can assist by equipping people with the resources and skills to develop local content but not with direct participation in the development of the content itself. ”

(**Jacob Ntshangase**, Executive Director, Institute for the Advancement of Journalism) (IAJ), South Africa)

The Content Divide

Interviewees across a number of countries viewed the relationship between African and Western content as dichotomous, an either/or. In Botswana, for example, it was felt that commercial stations push a “Western agenda” in an effort to appear young, fresh and vibrant at the expense of indigenous culture. Thus the concept of “local content” was often used as a counter-balance to Western programming. Consequently, local did not necessarily mean regional or national but instead was often used to refer to content from an African and, arguably, non-Western perspective.

Defining and Thinking Local

In the context of many interviews and as mentioned above, local content was defined as the opposite of Western content. Local was used to refer to African output often at continental level. Zimbabwe has taken an even more abstract approach, defining local content as anything that “helps to strengthen the aspirations of people” (Dr Tafataona Mahoso, Chairman, Media and Information Commission, Zimbabwe).

Local content was conceptualised within and across media. Local content was viewed as important for both news and entertainment and discussed in the context of print, radio and television. One interviewee in Botswana also interpreted “local content” to mean not just content of media but also the texts used to teach media. He argued that the use of foreign textbooks to teach journalism presented a significant challenge, as the materials did not reflect local realities.

Legislating the Local

While local content may appear to be a panacea, a challenge was seen to exist in developing an adequate definition of local content for legislative purposes. Moreover, while some governments or independent broadcasting regulators may indeed have legislation/policy guidelines in place requiring a certain percentage of local programming, whether the policy is followed or enforced is another matter. An interviewee from Kenya argued that while prospective legislation was to call for 70% local content, domestic production infrastructures could not support such a remit at a suitable level.

Community Media

Among those who prioritise any one type of media for support in terms of local content, the majority believe that community media should be the key focus for future initiatives. The arguments supporting this view speak to:

- the role of community media in advancing development objectives;
- community media success in giving a voice to communities; and,
- the sector’s ability to empower and skill communities who participate in supporting activities generated by such media.

Challenges

- The greatest challenge to community media is sustainability. There is some desire to encourage such services to become sustainable, but many think this is unattainable in the short or even medium term, and that funding should therefore be much longer term for this type of media.

State Media

State-controlled media include both radio stations and television channels and, in some of the countries studied, state-run newspapers.

Reach

The reform of state media to be more responsive and inclusive and to serve all sectors of the population is considered important, and support for the transformation of state into public media is considered a key priority. Those in favour of this argue that these national media bodies have the widest reach of all media and therefore potentially the greatest influence. There is, however, a contrary (but minority) view that state media receives sufficient support from donor agencies already.

Challenges

- **Too urban-focused.** The content of state media has been criticised as being too focused on urban audiences. While state media may have the widest reach, they may suffer from a shortage of resources and personnel, resulting in coverage focused on events happening in or near their urban base.
- **Need to be more diverse and impartial.** There is also a strong call for the content to be more diverse and, in particular, for the news agendas to be more impartial.

State-controlled media need a wide range of support activities, particularly with regard to legal reforms, in order to extend their ability to serve a wider range of populations and to be more diverse and impartial as part of their public service remit.

“ I think the donors should have a programme whereby reporting from rural areas or the hinterlands can also be part of Ghanaian regular news. Instead of everything being centred on the urban centres. To me, they should try to make a concerted effort to try to make news reach the areas while at the same time report news from these areas in the mainstream papers. ”

(Peter Owusu Donkor, Head of Programmes, Centre for Democratic Development, Ghana)

Private Media

Privately-run media refers to commercial media organisations, including radio, television, newspapers and online businesses.

Autonomy

Private media enterprises are typically welcomed as providing a counter-balance to state-controlled media (the agenda of which often reflects that of the government). There is a broad range of ownership but it is also important to keep in mind that in some countries a number of these private media houses are controlled by family members or business associates of the ruling parties.

Challenges

- ❑ **Perception of catering to business needs.** There is a widespread view that private media cater to business interests. However, there is polarisation between those who believe in support for the private sector – to support its role as the watchdog of government – and those who consider it too profit-driven and compliant with the needs of business.
 - ❑ **Imperative to develop business independent of donors.** There is a view that care needs to be taken that those disseminating valuable health and education messages do not do this at the expense of jeopardising the commercial viability of private media. When NGOs or other agencies buy spots from local stations to air their educational or social messages, it can damage the evolution of private enterprise and local media capacity by encouraging over-dependency on donors for this material.
 - ❑ **The commercial imperative.** On the other hand, there is concern that private media may become over-reliant on cheap foreign imports, whether music (for radio) or television (Brazilian telenovelas, back-catalogues of US series, for example) in order to meet financial targets and maximise profits. Such stations are also unlikely to have a public service remit and often target and reach a limited, up-scale demographic. In Ghana, market demands and a focus on profitability were seen as constricting local content. There is also some concern that the “tabloidisation” of newspapers, seen in a number of countries, is taking place at the expense of content with a more serious social and development focus. Media, particularly newspapers, had limited resources which restricted the breadth and possibly depth of local content. Similar sentiments were expressed in Nigeria, where it was claimed that commercial media lacked a sense of, and mandate for “social responsibility”, and were simply driven by the bottom line.
- “ *The commercial media tend to deliver service in areas where they make profits, areas where the privileged few live.* ”

(**Bobo Yusuf**, Programme Officer, Peace and Development NGO, Somaliland)

Media Monitoring

Ideally, the collection of data by media monitoring projects is not to be an end in itself but to be used as a tool for advocacy and a catalyst for change. The Southern African Gender and Media Audience Study, for example, conducted by the NGO Gender Links in 2002 and 2004, showed that women are under-represented in newsrooms and portrayed in limited roles in the news. The study sparked off debates in many of the 13 countries involved, resulting in the formulation of gender policies (promoting equity and equality) in some media houses. Over time, the data collected by such projects also act as a benchmark regarding progress on the health of the media sector.

Challenges

- ❑ **Big investment.** Media monitoring is expensive and time-consuming and requires a high level of skill and expertise.

Audience Research

Content-oriented audience research into what people want and what kind of impact the media have gives the media orientation for the improvement of their output. Professionally researched ratings can help in acquiring advertisements and thus improve business success. Media outlets can develop partnerships with individuals and organisations with the technical skills and expertise to design and execute research studies appropriate to the specific needs of a project.

Challenges

- ❑ **Value not understood.** Media organisations need to understand the use and value of audience research. The lack of a media and market research infrastructure inhibits the growth of the advertising/inward investment market.
- ❑ **Data not understood.** Audience research data need to be correctly understood. For example, people may not always know what they want because they are not aware of alternatives to existing media content: the lack of ‘popular demand’ in the collected data can lead to wrong editorial and programming decisions. Placing too much of a focus on ratings can result in the ‘tabloidisation’ of newspapers and dumbing down of radio and TV programmes.

6.4 Considerations for Future Activity

Media organisations face a wide range of challenges to improving the quality and diversity of local content. Three overall local content objectives were identified:

- ❑ **Foster and encourage the development of a local production skills base for radio and television programming to tap and harness creativity.**

Audiences and listeners are thought to have an appetite for locally-made content in preference to international content. However, production – particularly television production – is a high-cost activity and, even where the funding is available, there are significant skills deficits in this area. On the other hand, production costs for local content are sometimes overestimated: for simple soap-operas, talk shows and local entertainment they can be comparatively low.

Interviewees in Mozambique and Nigeria both felt that while the creative capacity to develop local content undoubtedly exists, the mechanisms do not exist to harness it effectively. Along similar lines, an interviewee in Zambia argued that regulators and media houses should reduce imported content and emphasise domestic creativity.

“ To have a locally-made programme on-air has been a very complicated area. That is why our televisions are full of all these ‘Secreto de Amor’ [telenovelas]. I know we have talent both behind the camera and in front of the camera but it is just too expensive. ”

(**Jenerali Ulimwengu**, Chairman, Habari Corporation, Tanzania)

- ❑ **Support local content in terms of cultural identity and local languages.**

Local content in local languages is important not just for its role in informing or educating audiences or readers, but also in terms of helping countries to establish their own identities by focusing on issues that are culturally relevant.

Language-specific content was explicitly identified as a need across five countries (Ethiopia, Ghana, Nigeria, Senegal and Uganda). A common sentiment was that too often media output is only available in colonial languages. A conscious move to present or at least translate programming into local languages was identified as needed. For example, in Senegal, media content is dominated by French and Wolof, but there are numerous other ethnic groups that are under-served by programming or content in their own languages.

Representation from within was also deemed important. Interviewees in Cameroon, Sierra Leone and South Africa observed that the majority of news about their country was generated externally. When it comes to reporting from other countries in Africa, too many media still have to rely on foreign news agencies and radio/television stations.

Therefore, the sentiment across the continent was that there is a need to have Africans report on Africa from an African perspective.

“ We should have more African content in our media, and one of the ways to do this is through regional or sub-regional projects for newsgathering and dissemination. Africans should report on Africa from the African perspective, rather than relying on foreign international news agencies which report from foreign perspectives that do not reflect the reality on the ground. ”

(**Asong Ndifor**, National President, Cameroon Association of Commonwealth Journalists (CACOJ), Cameroon)

“ Developing content and local content. For me that is important. Because so many of the stories in Africa are told by Reuters, Bloomberg, etc. So establishing local wire services for one would be wonderful. Establishing pools of competent correspondents in each country would be great. ”

(**Ferial Haffajee**, Editor-in-Chief, *Mail & Guardian* newspaper, South Africa)

Create a wider range of content focused on social and developmental issues – for example, addressing topics such as health or environmental degradation.

Where such content exists, it is not always sufficiently entertaining or compellingly presented. Moreover, many media outlets focus too much on “official” news. Journalists need to be trained and offered incentives to report on issues such as HIV/AIDS and other development issues, and editors need to be encouraged to widen media agendas.

“ It seems the current media give priority to politics. They need to serve the public in the enhancement of education, in the fight against diseases such as AIDS, malaria, and tuberculosis....to sensitise the people about the importance of peace and the need to maintain and protect it. The media should also educate the people on production and other development. ”

(**Abdi Gobdon**, General Manager, Global Media Corporation, Somalia)

“ Content must be informative but also entertaining. I find that much developmental content tends to be dry and boring. ”

(**Matthew Buckland**, Online Publisher, *Mail & Guardian* Online, South Africa)

Facilitators and Enablers for Local Content

A number of different activities were identified as necessary to support greater local content, embracing both training, support for institutions and access to financial support for production or for equipment.

□ Provision of Equipment

Equipment ranging from cameras and tape recorders to bicycles and other means of transport for reporters is key to strengthening and building capacity across media to produce quality, diverse local content.

□ Training Programmes

Capacity-building to support craft and journalism skills, and issue-specific training programmes¹⁰¹, are key to supporting local content production. There is a particular need for training to help present developmental and social issues in easy-to-digest and entertaining ways that recognise which audiences will increasingly have a choice of which media to consume.

□ News Agencies

There was also a call for establishing or supporting independent news agencies that would concentrate on gathering source material from rural or remote populations. Such agencies would help to provide a greater diversity of news coverage and, if independent of government control, could provide more impartial coverage of events.

“ A news agency that would be able to collect news from every part of the country is necessary, given that presently most Cameroonians, especially those in the hinterlands, do not identify with the news on the media, especially the state media (CRTV). This is so because CRTV is unable to cover the entire national territory. ”

(**Jessie Atogo Ekukole**, Senior Practitioner, CRTV, Cameroon)

□ Market Research

There is a need to support organisations and encourage them to carry out individually (or as groups) market research for content providers about interests, reach and impact, as well as to enable those selling advertising to do so more effectively.

□ Regulatory Reform

There is a view that reforming, supporting and strengthening regulatory frameworks can help to increase local content. If, for example, an independent broadcasting regulator sets and enforces reasonable local quota for all sectors of broadcasting (public, private, community), the production of local content would be stimulated. In South Africa, for example, there is a license condition which states that various types of radio stations have to play varying percentages of South African music; this has bolstered the local music industry. Regulatory frameworks aside, this view is echoed by one interviewee in Zimbabwe, who argued strongly for donors to not unduly influence or compromise the editorial policies of media organisations.

□ Monitoring

Editorial independence, impartiality and other issues, such as representation of women, election coverage etc, are greatly enhanced by monitoring the outputs of media organisations and monitoring is consequently considered an important activity to support.

□ Pragmatism and Co-production

With high costs and limited funding, co-productions with international partners were suggested as one avenue to develop high-quality content for export. Senegalese production company, Generation TV, was cited as an example of a company taking this approach. Generation TV also reported taking a pragmatic approach which involved assessing the need, demands and niches for content, as well as securing or at least exploring avenues for distribution in advance.

□ Export Strategy

The high cost of producing local content was a universally-acknowledged inhibiting factor. However, it was suggested that the production of high-quality local content should be viewed as a business opportunity, and that media outlets or production houses should develop a long-term strategy for content export that will generate revenue and help the industry to develop.

End Notes

⁹² A full list of AMARC publications is available on its website: <http://africa.amarc.org/>

⁹³ Further information about “Africa: Open for Business” is available from the project’s website: <http://www.africaopenforbusiness.com/>.

⁹⁴ For example, see Steadman Research Services International-Kenya (2005).

⁹⁵ For more information, visit www.pamro.org.

⁹⁶ Gender Links (2004). *Gender and media audience study. Southern Africa report*. The study covered 13 Southern African countries and followed on from their Gender and Media baseline study conducted in 2002. Gender Links (2003) provides an analysis of the representation of women in the media. A more recent Gender Links publication is Rama and Lowe (2005).

⁹⁷ As an example, the visible results of MISA’s media freedom monitoring can be seen in the daily Internet dissemination of Action Alerts, that are concise reports of media freedom violations that have taken place in the various countries of the SADC region, accompanied by recommendations for follow-up action.

⁹⁸ Countries covered by the report are: Botswana, Ghana, Lesotho, Malawi, Mali, Namibia, Nigeria, South Africa, Tanzania, Uganda, Zambia, and Zimbabwe.

⁹⁹ Although largely entertainment-focused, a notable exception to this is Nigeria, with its burgeoning ‘Nollywood’ industry. Most interviewees from this country consider local content production a low priority.

¹⁰⁰ This view was raised across Botswana, Cameroon, Ghana and Zimbabwe.

¹⁰¹ For example, Internews’ *Local Voices* programme that focuses both on capacity building and raising awareness of HIV/AIDS and other issues



7. Principles, Identity and Organisation

“ We want pluralism but it won’t be the same pluralism you get in Europe or what you get in Japan or what you get in the United States or Canada or Mexico. It’ll be a Southern African pluralism...”

(David Kerr, Head, Journalism School, University of Botswana)

7.1 Key Principles

There is a strong feeling that efforts to strengthen the media in sub-Saharan Africa must adhere to a set of key principles.

- **A locally- or regionally-defined agenda** framed and ultimately co-owned by those who are to participate or benefit from an initiative. A widely-based consultation with the various stakeholders, ranging from consumers to governments, is most likely to generate solutions that are acceptable and useful. Programmes of work based on a locally-defined agenda are thought less likely to attempt to import unsuitable models or paradigms from the West into sub-Saharan African countries. At the same time, such agendas may be able to set more ambitious targets that are not limited by cultural stereotyping or preconceptions of what is available.

“ We should develop our own programmes for which we can take ownership locally. ”

(Isaac Massaquoi, Coordinator, Community Radio Network, and Lecturer, University of Sierra Leone)

- **A needs-based approach** that reflects where the gaps and requirements are. This should be based on rigorous research that takes into account what is already being done and what needs to be done, at a local, country and regional level. Research-based programmes of work are less likely to set unrealistic or unwanted goals.

“ They need to listen to Somali journalists before they decide what kind of training they deliver. They need to consult with the Somali journalists, they need to understand the needs of the Somali journalists, and they need to understand the state of the media in Somalia. Sometimes they don’t fully understand the needs and they make decisions from afar. ”

(Omar Qadi, EDia Institute, Mogadishu University, Somalia)

A collaborative approach which involves participants at all levels from the ground up, and that uses both local and international experts and capacity to implement initiatives wherever possible.

It is acknowledged that a variety of agencies will bring particular skill sets to projects, but where this is so, it should be done in due recognition that this is – or should be – driven by local knowledge and expertise.

“ It is important to work with other African organisations in such a way that we could learn lessons and they could also help us. The Association for Women’s Media in Kenya is important because we could be exchanging our ideas on how they work on their programmes. ”

(Zamzam Abdilaahi, Somalia Women’s Journalist Association)

- A programme that **builds in sustainability** from the outset. Too often, donor programmes appear to be short-term, ad hoc or lacking a strategic focus, without sufficient thought being given to longer-term outcomes. Embedding sustainability objectives into initiatives might mean long-term monitoring and mentoring (for example, of training programmes) to ensure that impact is not lost or diluted. It is also, whenever possible, about making initiatives financially sustainable.
- **An appropriate and reasonable timeframe** that is long enough to ensure sustainability of projects and guarantee the best chance of success. A generous and realistic timeframe is imperative to ensure that initiatives can become sustainable. There is a widely-held view that too many donor programmes are short-term in nature, impacting significantly on the staffing and capacity-building of projects. “Short-termism” is also believed to skew the design and selection of projects and to favour those that can deliver a “quick win” to donors demanding evidence of impacts at the end of programmes to satisfy their own internal targets. Five years is considered a reasonable life cycle for a project, accounting for the scale and objectives of each individual programme of work.

“ There are long-term objectives that need to be sustained and it’s almost pointless putting money into it for a year or two. You’ve got to be in there for the long haul if you really want to see a difference... ”

(Colleen Lowe Morna, Executive Director, Gender Links, and Chairperson of GEMSA, South Africa)

- **Evaluation and monitoring mechanisms** should be embedded into media development projects from the outset to assure impact, and in order to build on experiences and deliver quality assurance regarding delivery of programmes. The lack of formal or structured evaluation or monitoring procedures is particularly noticeable at country level, and is not as true of regional or international projects. The requirement for evaluation and monitoring can be a problem, however, if timescales are not sufficient to recognise that many programmes will only have impacts over the longer term. A range of both customised and standardised methodologies need to be employed in order to facilitate the evaluation of a broad range of media development activities¹⁰².

7.2 A Pan-African Approach

Benefits

There is widespread and consistent endorsement of a continent-wide approach to supporting media development that is driven by national/regional needs and priorities. A range of key benefits were identified when taking a continental approach.

- **Creating Space for Advocacy:** it is easier to lobby for changes to government policy if the weight of the whole region, or even continent, is behind a particular activity or media initiative.

“ Pan-regional media initiatives help galvanise regional opinion on issues of common interest. ”

(**Thomas Deve**, Chairman, MISA, Zimbabwe)

- **Shared Learning:** a pan-African initiative provides the opportunity for shared learning opportunities. Media research and data-gathering are particularly cited in this respect. It can also be a means of facilitating cultural interaction; breaking down the barriers that often exist between Anglophone and Francophone nations, for example.

“ The media must exchange their experiences of the production of information at sub-regional or even regional levels in order to promote the best practices of one country or another. ”

(**Diana Senghor**, Executive Director, Panos Institute West Africa, Senegal)

- **Joint Purchasing Power:** a regional structure might also provide joint purchasing power for member countries and, through harmonisation of trading practices, improve regional investment opportunities.

- **Integrated Funding:** finally, the potential of integrated funding was identified as a regional opportunity. This has been demonstrated to some extent in Southern Africa. There is a view that bodies such as the Media Institute of Southern Africa (MISA) and the Southern African Editors Forum (SAEF) receive more funding because of the SADC framework with its emphasis on integration and cooperation. This has enabled the region to develop strong economic leverage, improved infrastructure and good governance.

“ I think it should become like a fund or something. But it should be in a format which is independent but linked with other institutions, like say SAMDEF, link with SAIMED for training, link with NSJ, link with MISA for issues of advocacy, around issues of policy reform and the regulatory environment. So it cannot do the activities itself. It needs to coordinate, manage, plan. A think-tank kind of thing. This is how I see it. ”

(**Kaitira Kandjii**, Regional Director, MISA, Windhoek, Namibia)

Challenges

Despite the enthusiasm for the potential benefits of a pan-African approach to media sector development, it is also seen to have specific challenges.

- **National needs and priorities:** it is imperative that any future initiative that takes on a pan-African identity is sufficiently flexible to reflect the needs and challenges faced at national/regional level. Problems experienced by other African initiatives such as the Pan-African News Agency (PANA) and the Union of National Radio and Television Organisations of Africa (URTNA), were cited.

- **Sustainability:** because of the scale of the approach, the extent of the challenges and the history of previous pan-African efforts, there is a concern about the sustainability of the proposed initiative and its ability to attract sufficient finance.

“ Pan-regional initiatives have always been good. But the problem is sustainability. You know, we set up PANA we have this thing we call – for radio, for television based in Nairobi [URTNA]. And they are not functioning the way we want them to. The idea was to send news across to a headquarters for distribution to all member countries but it’s not working the way it should... PANA is not working the way it should because members are not even able to pay their subscription, their fee, membership and so on. ”

(Kofi Amponsah Bediakoh, Ministry of Information, Ghana)

- **Coordination:** there is also some scepticism as to the ability of a number of organisations to share and implement joint initiatives while addressing differing national agendas. The difficulty of harmonising agendas is evident also at donor level.
- **Secure support of pan-African governance structures:** putting media development on the agenda of continental governance structures was identified as a key strategy that would help to raise the profile of work in this sector. This kind of engagement would lend credibility and status to such an initiative and improve its chances of acceptance across the continent, irrespective of what other partnerships or networks are involved.

“ If the issue is taken at that level, heads of African states who understand media operations and why it is necessary to have the independent media in any country will help their counterparts to see the media as a partner in development. ”

(Marianne Nganunu, Permanent Secretary, Ministry of Science and Technology, Botswana)

7.3 Organisational Structure

- **No need for a new organisation:** there is a strong consensus that it is unnecessary to establish a new organisation in a field that is already well-served by multiple agencies. Building on and strengthening existing entities is imperative
- **African leadership:** this is taken as a given, and fundamental. But to succeed, an initiative has to become an international partnership with service providers, experts and donors from outside Africa.
- **Autonomy is essential for its success:** this autonomy was considered specifically in terms of the organisation’s funding structure. A number of suggestions were made about the governance and operating structure of the new initiative. Many believe that the new initiative should be some kind of umbrella partnership between governments, NGOs and other media development stakeholders. Such an organisation would solicit funding and would be independent from the pressures exerted on any single organisation or country. A foundation would enhance cooperation across the region and ensure that no one party could exert excessive leverage. The Media Trust in Zambia and the Media Development and Diversity Agency (MDDA) in South Africa were cited as potential models that might be followed in terms of their operating structures.

“ You wouldn’t want a process whereby you are getting the funding all right but at the end of the day you more or less become a kind of remote control by some donor organisation to do their own thing. ”

(**Osabutey Anni**, Studio Manager, Radio Valco, University of Cape Coast, Ghana)

- **Focus should be to improve and secure funding:** The clearly preferred remit of any such body would be to acquire and/or facilitate the funding and support of a wide range of media development initiatives. Funding is likely to be a mixture of loans and grants with loans delivered at preferential rates.

“ I think that the donors first and foremost must work as a team if they want to effectively impact on media. I think it is important to look at the ‘basketing’ concept where the donor does not at the end of the day have to choose a component of the media financing or media support because once you choose one component, that component in itself will not make much of a difference unless you look at the holistic strategy that addresses the various aspects of media development. ”

(**Charles Mundale**, CEO, Southern African Media Development Fund (SAMDEF), Gaborone, Botswana)

- **Donor coordination is imperative:** There is a broad-based consensus that the donor community needs to coordinate its efforts in order to make a meaningful contribution to the development of the media sector in sub-Saharan Africa.

“ I think that coordination among donors is a very serious issue as well. There’s a tendency... there’s fashionable projects and there are projects that come in and out of fashion and donors tend to run for and jump for those particular projects. ”

(**Colleen Lowe Morna**, Executive Director, Gender Links and Chairperson of GEMSA, South Africa)

- **Avoid duplication at the point of delivery:** essential to the organisation’s remit is to avoid the duplication of effort and overlap of programmes that characterise the media development field in Africa. To combat this duplication of effort, sharing information and conducting in-depth research on media needs and the impact and effectiveness of current donor-backed programmes were called for as essential part of the organisational remit. Additional strategies to foster this sharing of information included: networking and coordination between development projects; a centralised information secretariat; or, the creation of a databank of training and seminars.

End Notes

¹⁰² There was little sense at country level that projects are evaluated on a regular basis, but at regional and international level, evaluation is not only considered important, but is often embedded in projects from the start. Evaluation is, however, something of a double-edged sword. Evaluation helps organisations to judge the success of their projects, and is increasingly demanded by donors. This, in turn, has a knock-on effect. Evaluations often seek to measure impact, and those bidding for (and granting) funding may then be influenced in how projects are framed, chosen and selected. In particular, smaller organisations who may be accountable to donors, or who are bidding for relatively short-term funding, may be driven to design projects that yield the most easy-to-measure outcomes, or a “quick fix”. Larger bi-lateral or international organisations have a variety of sophisticated measurement systems in place for evaluation and may well have the luxury of evaluating or monitoring impact over many years. For example, UNESCO uses its field officers with responsibility for a cluster of countries to monitor progress on a continuous basis.



8. Conclusion

The potential of the media to contribute significantly to Africa's development and governance is enormous. This report has attempted to put media itself in the spotlight. A widely-held view expressed across the countries surveyed was that too many media development investments have been unviable – lacking in scale and sustainability, strategic focus, coordination, and an ability to demonstrate or monitor impact. It was also felt that too often development activities are driven by external agendas as opposed to local needs. In tandem with this critique was a pessimism that the concerns raised would go unaddressed by donors and foreign NGOs who do not want to change the way they work. However, the aspiration of this report has been to try and present an evidence-based case for investments and activities that seek to find new and better ways to work.

The overview of the media landscape (Chapter 1) highlighted some dramatic changes and important trends within the African media sector that have taken place between 2000 and 2005. Radio was shown to be the medium of preference with significant growth in the number of commercial stations across many countries. State broadcasters tended to dominate both the national radio as well as television, but there has been some growth in pay-TV and satellite channels. Many countries surveyed also experienced significant increases in the numbers of practising journalists with a concomitant rise in the number of amateur and untrained journalists. Offsetting this surge in journalists is a marginal increase in the university or vocational training institutions that ultimately train the current and future generations of media practitioners. Consequently, interviewees commented on the need for basic skills – whether reporting or business-related – to ensure the robustness of their content and to ensure the financial sustainability of their media outlet. Thus, this issue of sustainability is not limited to community media but to many African media outlets operating in a challenging economic, legislative, regulatory, political and technological environment.

One of the more explosive areas of growth has been in cellular mobile telephony, with some countries experiencing massive increases in usage levels. Whilst there may still be transmission limitations that confine cellular mobile use to more urban areas, the low cost of entry and ability to be “mobile” present media practitioners with a new audience and a possible expansion of the definition of local content production in text messaging and other electronic communications. Furthermore, the presence of new forms of media within these nations presents a new set of opportunities and challenges for the citizens/users, media practitioners, NGOs, journalists and regulators.

The review of the media legislation and regulatory environment (Chapter 3) showed that the key barrier to media development is the control that states exert over media. The report identifies some key areas of focus for future regulatory considerations. They include: (1) ensuring freedom of expression and access to information by way of legislation; (2)

consistent policy on the independent allocation of licences; (3) protection of journalists; and, (4) strengthening of independent regulatory frameworks. Such efforts would further improve the media landscape in that state and private media are currently operating.

To shape future regulatory structures and systems, it is critical that all media actors invest in dialogue and engagement across multiple stakeholders. Such approaches will broaden the debate at various levels of civil society, media and the government. Moreover, developing such engagement networks will not only move towards reforms of the state media but will also increase the accountability of private media. The research indicates that there is a need for more transparent regulatory frameworks, more training and guidelines, as well as monitoring of the media and of government performance and compliance.

It is universally acknowledged within the report that there is a poor state of media infrastructure, including equipment, facilities and maintenance (Chapter 4).

The basic need to establish and propel media development must be overcome if these nations hope to provide robust media experiences for their citizens. Moreover, the lack of media support agencies – whether media monitoring entities or market research and advertising actors – indicates other challenges for countries' media economies. This absence of media agencies is often due to the lack of an adequate audience to which to market media products.

The underdeveloped media structures in the countries surveyed were constrained by the lack of financial inputs (investments). State media remain under-funded, as attested to by the exodus of journalists from state media outlets to better-paying positions with corporate entities. Moreover, the lack of skilled printers, in the Zambian example, highlights the underdeveloped media skills within Zambian society. Thus, the deficiency of financial inputs from private and state actors, and the subsequent lack of media equipment, destabilises the financial sustainability of the media infrastructure.

Given the challenges facing the media sector in many of the countries surveyed, professional, ethical, management and technical standards remain low (Chapter 5). Forces at work on this continuing trend include insufficient training institutions or poor quality of training, the rapid media growth in some countries, and the low salaries and status of journalism. There has been an increase in training initiatives. However, such programmes are seen as lacking funding and a long-term horizon in approach/education, and as missing a strategic approach to training within and for media organisations.

As the research indicates, professional development, when tailored to a workplace, an issue or a talent is viewed as more relevant and delivering better value than more generic training. Additionally, comments indicate that media training outside the country is wasteful. At the core of future efforts must be a role for evaluation mechanisms that help course providers and even participants become accredited and update their skills, as well as provide funders with evaluation information.

The precarious financial and political positions of many small media outlets mean they lack the long-term financial sustainability needed to improve the quality and diversity of their content and, in turn, to grow their audience (Chapter 6). As such, much of the national media output remains urban and elitist, and the content is often closely aligned with the political positions of the government or ruling party.

The lack of coordination between media stakeholders within the countries surveyed can be partly explained by the general absence of organisations including NGOs, market research firms and media monitoring agencies charged with producing and supporting local content. Such challenges complicate efforts to develop local media development agendas that can be sustainable and conducted on an ongoing basis at present.

As previously mentioned, the flowering of new media platforms presents an opportunity to guide media initiatives through new channels and secure support of a pan-African approach to media development (Chapter 7). Such an effort will need to allow for shared and coordinated projects and learnings, to create more sustainable models of media development, to open up space for advocacy, to invite more integrated funding (and avoid duplicative efforts) and to respect the need for tailored content for local audiences. This type of initiative would reduce some of the challenges faced by the individuals interviewed in this report, and we welcome the opportunity in the future to survey what will be a media landscape with not just local, national or regional, but global consequences.

With the findings of this report in mind, it is clear that future media development initiatives need to be at scale, with longer duration, and able to foster more strategic collaboration between international and African partners. It is our sincere hope that this research and the findings of the African Media Development Initiative will assist the wider media development community as well as the international donor community in lending insight to future efforts, so that these endeavours may be as meaningful to Africa and Africans as possible.



Glossary

For the purposes of this research:

Community Media: Largely non-profit, small-scale private enterprises, with the state establishing and maintaining full or partial ownership of community-based media.

Community Newspaper: Press that are generally owned by the community or non-profit making organisations, and either reflect the interests of a specific community (or community of interest) and/or reflect a high degree of participation by that community.

Community Radio: Stations that are generally owned by the community or non-profit-making organisations, and either that reflect the interests of a specific community (or community of interest) and/or reflect a high degree of participation by that community.

Community Television: Stations that are generally owned by the community or non-profit-making organisations and either reflect the interests of a specific community (or community of interest) and/or reflect a high degree of participation by that community.

Media Development: Internally or externally funded activities that contribute to the development of an independent and pluralistic media – including private, public and state media and potentially covering a diverse range of activities, such as:

- ❑ developing/influencing legislative and regulatory frameworks;
- ❑ audience research and media monitoring;
- ❑ training;
- ❑ curriculum development; and,
- ❑ establishing or supporting of independent or alternative media outlets/enterprises.

Mobile Phone Subscriber: According to the ITU (2005), mobile cellular subscribers account for, “users of portable telephones subscribing to an automatic public mobile telephone service that provides access to the Public Switched Telephone Network (PSTN) using cellular technology. This can include analogue and digital cellular systems but should not include non-cellular systems. Subscribers to fixed wireless [eg, Wireless Local Loop (WLL)], public mobile data services or radio paging services are not included”.

National Press: National press aim to cover news from the entire country and distributed at least in urban areas throughout the country.

National Radio: A national radio station is defined as one that has a claimed geographic coverage of at least 60% of the country.

National Television: A television channel that broadcasts nationally is defined as one that has a claimed geographic coverage of at least 60% of whole country.

Organisation-based training: Media training that is conducted outside of university or vocational training programmes. Often this is conducted by non-governmental organisations (NGOs).

Pan-Regional Radio: A radio station that broadcasts across several countries in a region, eg across East Africa.

Private/Commercial Media: Non-state media that are generally owned by private or commercial interests. This term may also include religious media.

Professional Development: Opportunities for journalists to increase and build upon their skills through training, accreditation programmes and coursework.

Readership: Where possible, newspaper readership is defined in terms of the number of people "having read a particular newspaper in the past seven days".

Regional Media: Broadcasters and newspapers that provide coverage and distribution within and to sub-national geopolitical region(s) such as provinces, states and/or urban centres within a single country.

Regional Press: Regional press aim to cover news from region(s), provinces(s), state(s) or urban centres within a single country. Distribution is often limited to specific urban areas throughout the country.

Regional Radio: A station that broadcasts to region(s), provinces(s), state(s) or urban centres within a single country.



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Appendices

Appendix A: Research Teams

East Africa Research Team

DRC

Dr Dominique Mweze
Professor, Catholic University of Kinshasa

Ethiopia

Dr Gebremedhin Simon Gebretsadik
Professor, Institute of Language Studies, Addis Ababa University

Kenya

Professor Lucy W. Maina
Lecturer, Kenyatta University, Nairobi

Somalia

Jamal Abdi Ismail
Senior Research Officer, BBC World Service Trust

Tanzania

John Muthee
Country Manager, The Steadman Group Tanzania

Professor Nandera Mhando

Assistant Lecturer, Department of Sociology and Anthropology
University of Dar es Salaam

Uganda

Dr John Wotsuna Khamalwa
Senior Lecturer and Coordinator, Social Anthropology and Religion, Institute of Languages,
Makerere University, Kampala

Southern Africa Research Team

Dr Guy Berger

Hub Co-Director

Professor and Head of Department, School of Journalism and Media Studies,
Rhodes University, Grahamstown, South Africa

Dr Lilian N. Ndangam
Hub Co-Director

South Africa

Andrew Mellon Post-Doctoral Fellow, School of Journalism and Media Studies, Rhodes University

Anne Taylor, Journalist,
School of Journalism and Media Studies, Rhodes University

Claire Milne
School of Journalism and Media Studies, Rhodes University

Andrew T.S. Kanyegirire
School of Journalism and Media Studies, Rhodes University

Angola

Barnaby Smith
Research Officer, BBC World Service Trust, London (UK)

Candido Mendez
Research Officer, BBC World Service Trust, Luanda

Botswana

Sechele T. Sechele
Independent media consultant, Gaborone

Mozambique

Fernando Andre
Editor, *Savana*, Maputo

Zambia

Dr Fackson Banda
SABMiller Chair of Democracy and Media
School of Journalism and Media Studies, Rhodes University, Grahamstown, South Africa

Zimbabwe

Rashweat Mukundu
Journalist, Harare

West Africa Research Team

Dr Mohammed Umar-Buratai
Hub Director
Senior Lecturer, Theatre and Drama, Ahmadu Bello University, Zaria, Nigeria

Cameroon

Dr Charles Esambe Alobwede
Lecturer, Department of English Modern Letters and Department of Bilingual Studies,
University of Yaoundé

Ghana

Dr Samuel Kafewo
Lecturer, Ahmadu Bello University, Zaria, Nigeria

Nigeria

Dr Jenkeri Zakari Okwori

Country Researcher

Associate Professor, Department of Mass Communication, Ahmadu Bello University, Zaria

Akeem M. Adeyanju

Hub Research Assistant

Lecturer, Department of Mass Communication, Ahmadu Bello University, Zaria

Senegal

Dr Ibrahima Seck

Assistant Professor, History Department, Cheikh Anta Diop University, Dakar and
incumbent Secretary General, African Branch, West African Research Association

Sierra Leone

David Tam-Baryoh

Executive Director, Centre for Media Education and Technology (C-Met), Freetown

Appendix B: Interviewees

Angola

1. Messias Constantino

President, Associação de Jornalistas Económicos de Angola

2. Dr Ana Faria

Portu International School

3. Antonio Freitas

Editor, *Agora*

4. Father Maurício Kamuto

Director, Rádio Ecclésia

5. Domingos Major

Director of Information, Acção Para O Desenvolvimento Rural E Ambiental

6. Suzana Mendes

Editor, *Angolense*

7. Joaquim Paulo,

Director, Centro de Formação de Jornalistas

8. Anacleta Pereira

Consultant, Media Institute of Southern Africa (MISA)

9. Paulo Pinha

Editor, *Economia e Mercado*

10. Justino Pinto de Andrade

Professor, Universidade Católica de Angola

11. Dr Jose Rangel

Journalism Course Coordinator, Instituto Médio de Economia, Luanda

12. Luisa Rogerio

Secretary-General, Sindicato dos Jornalistas de Angola

13. Augusto Santana

Director, Electoral Institute of Southern Africa

The 13 interviewees consented to being quoted directly and identified. One interviewee agreed to speak on tape but did not consent to having their name associated with their comments.

Botswana

1. Tachilisa Balule

Law Lecturer, University of Botswana

2. Professor David Kerr

Head of Media Studies, Journalism School of the University of Botswana

3. Methaetsile Leepile

General Manager, CBET Publishing Company

4. Modise Maphanyane

National Director, Media Institute of Southern Africa (MISA)

5. Norma Moremong

Co-managing Director, The Dialogue Group, Gaborone

6. Mike Mothibi

Editor, *The Botswana Guardian* newspaper and Chairman, Botswana Editors' Forum

7. Marriane Nganunu

Permanent Secretary, Ministry of Communications, Science and Technology

8. Baboloki Tlale

Executive Secretary, Botswana Council of NGOs (BOCONGO)

9. Loago Raditedu

Executive Director, Botswana Exporters' Association

10. Owen Rampha

Programme Manager, Yarona FM radio station, Gaborone

11. Letshwiti Tutwane

Lecturer, Media Studies Department of the University of Botswana

The 11 interviewees consented to being quoted directly and identified. A senior government official was interviewed but declined to be quoted.

Cameroon

1. Jessie Atoko

Senior practitioner, Cameroon Radio and Television Corporation (CRTV)

2. Anne Geudheu Youmbi

President, Association des Professionnelles Africaines de la Communication

3. Asong Ndifor

National President, Cameroon Association of Commonwealth Journalists

4. Barrister Akere Muna

Vice President, Transparency International

5. Charlie Ndichia

Senior Practitioner (Editor-in-Chief), *The Post* newspaper

6. Dr Asheri Kilo

Treasurer, Cameroon Media Council (CMC)

7. Peter Essoka

Analyst and Member of the Human Rights Commission

8. Dr Ngwang Michael

Lecturer, Head of Department, Advanced School of Mass Communication (ASMAC)

9. Dr Sillar Mactar

Chief Executive, Spectrum Television Network (STV 1 & 2)

10. Jenny Scott

Director, British Council

11. Cardinal Christian Tumi

Archbishop of Douala, Roman Catholic Church

12. Sophie Beyala

Coordinator, Community Radio Project, UNESCO

The 12 interviewees named consented to being quoted directly and identified. Two senior government officials and a school head declined to be quoted.

DRC

1. Kasonga Tshilunde

General Secretary, National Union of Press in Congo

2. Professor Aimé Kayembe

Lecturer, Information and Communication Sciences, Catholic University of Kinshasa

3. Médard Tshipidiayi

Director, Megatel Telecommunications

4. Baudouin Tschombe

Coordinator, Exchange Centre for Congolese Law (CAFEC)

5. Françoise Mukuku

Journalist and Coordinator of NGO 'Si Jeunesse Savait'

6. André Yoka Lye

University Professor and UNESCO consultant

7. François Budim'bani Yambu

Publishing Director, *La République* and *JV* magazine

The 7 interviewees consented to being quoted directly and identified. Two senior government officials and a school head declined to be quoted.

Ethiopia

1. Dr Tamirie Teka

Country Representative, Panos

2. Paul Hector

Communication Expert, UNESCO

3. Dr Negussie Tefera

Country Representative, Population Media Centre

4. Adey Abebe

Communication expert, Christian Relief and Development Agency (CRDA)

5. Berhane Hailu

Minister of Information

6. Tabor Gebremedhin

Deputy Manager, government Board of Broadcast Media and Management

7. Mekonnen Birru

Deputy Editor-in-Chief, *Addis Zemen*

8. Teferi Mekonnen

Journalist and former Editor of *Eftin* newspaper

9. Tigist Kassa

Private media consultant

10. Professor Abiyi Ford

Dean, School of Journalism and Communications, University of Addis Ababa

11. Amare Aregawi

Editor and Publisher, *The Reporter*

12. Tigist Hiruy

Head, Department of Journalism and Communication, Unity University College

13. Taddese Zenaye

Director, School of Journalism and Communications, Undergraduate Division

14. Abebech Wolde

Executive Director, Ethiopia Media Women's Association

The 14 interviewees consented to being quoted directly and identified. An editor of a government newspaper declined to be quoted.

Ghana

1. Kwabena Sarpong Anane

Regional Director, Radio Central Cape Coast

2. Osabutey Anni

Studio Manager, Radio Valco, University of Cape Coast

3. Kofi Amponsah Bediakoh

Social Services Spokesperson, Ministry of Information

4. Gina Ama Blay

Managing Editor, *Daily Guide* newspaper Western Publications Company

5. Bright Kwame Blewu

Secretary General, Ghana Journalists Association

6. Ato Kwamena Dadzie

Country Director, Journalists for Human Rights

7. Peter Owusu Donkor

Head of Programmes, Centre for Democratic Development

8. Yao Dziekpor

Deputy Director of Television, Ghana Television

9. Dr Audrey Gadzekpo

Lecturer; School of Communication Studies, University of Ghana, Legon

10. Dr Yao Graham

Coordinator, Third World Network Africa

11. Sylvanus Kuwornu

CEO, ADS Ltd.

12. Evans Oheneba-Mensah

Director of Research and Monitoring, National Media Commission

13. Kweku Rockson

Acting Director, Ghana Institute of Journalism

The 13 interviewees consented to being quoted directly and identified. A television manager in the government sector and a newspaper editor declined to be quoted.

Kenya

1. Flitz Kopsieker

Resident Representative, Friedrich-Ebert Stiftung (FES)

2. Joe Kadhi

Lecturer, United States International University (USIU)

3. Tom Idimuli

Head of Media, Gina Din Corporate Communications (GDCC)

4. Macharia Gaito

Managing Editor, *Nation* newspaper (Sunday edition)

5. Mitch Odero

Chair, Complaints and Standards Committee, Media Council of Kenya (MCK)

6. Esther Kamweru

Executive Director, Media Council of Kenya (MCK)

7. Kanja Waruru

Chair, Media Owners Association (MOA)

8. Ian Fernades

Broadcasting Director, Nation Media Group

The eight interviewees consented to being quoted directly and identified. Six declined to be quoted: two government representatives, one NGO representative, one academic, one media support practitioner and one media practitioner.

Mozambique

1. Eduardo Namburete

School of Communication and Art, Eduardo Mondlane University

2. Refinaldo Chilengue

Chairman, Association of Media Companies

3. Palmira Velasco

Chair, Association of Women in Media

4. Marcelino Alves

Senior Lecturer, Higher University and Polytechnic Institute

5. Lourenço Do Rosário

Rector, Higher University and Polytechnic Institute

6. Rogério Siteo

Editor, *Notícias* daily newspaper

7. Salomão Moyana

National Chairman, Media Institute of Southern Africa (MISA)

- 8. Fernando Lima**
Chairman, Board of Directors, Mediacoop
- 9. Eduardo Constantino**
Secretary General, Mozambique Union of Journalists
- 10. Lourenço Jossias**
Editor, *Zambeze* weekly newspaper
- 11. Eduardo Siteo**
Senior Lecturer, Eduardo Mondlane University
- 12. Américo Xavier**
Director, School of Journalism
- 13. Simão Anguilaze**
CEO, Mozambique Television
- 14. Luís Covane**
Deputy Minister of Education and Culture
- 15. Felizberto Tinga**
Director, Government Department of Information

The 15 interviewees consented to being quoted directly and identified.

Nigeria

- 1. Father Victor Yakubu**
Director General, Catholic Media Centre
- 2. Kaduna Tony Iyare**
Editor-in-Chief, *Gleaners Online*
- 3. Alison Data-Phido**
Programme Director, African Radio Drama Association (ARDA), Nigerian Chapter
- 4. Adesuwa Onyenokwe**
Television presenter, Universal Communications
- 5. Godwin Omole**
Executive Secretary, Nigerian Press Council
- 6. Mary Udumah**
Head of Corporate Planning and Research, Nigerian Communications Commission
- 7. Mark Ojiah**
Head of Planning and Research, Nigerian Broadcasting Commission (NBC)
- 8. Angela Agoawike**
Secretary, Nigerian Guild of Editors (NGE)
- 9. Adeniyi Bello**
Head, UNILAG FM community radio
- 10. Ralph Akinfeleye**
Professor of Mass Communications, University of Lagos

11. Mallam Kabiru Yusuf

Editor-in-Chief, Media Trust of Nigeria, publisher of the *Daily Trust* and *Weekly Trust* newspapers

12. Stella Okunna

Professor of Mass Communications, Nnamdi Azikwe University, Awka

13. Nosa Osazuwa

Officer-in-Charge, United Nations Information Centre (UNIC)

14. Shuaibu Leman

Secretary General, Nigerian Union of Journalists (NUJ)

The 14 interviewees consented to being quoted directly and identified. A media practitioner from the public sector declined to be quoted.

Senegal

1. Eugénie Rokhaya Aw

Director, Centre d'Études des Sciences et Techniques de l'Information

2. Abdou Latif Coulibaly

Director, Institut Supérieur des Sciences de l'Information et de la Communication

3. Bacar Dia

Minister of Information

4. Moussa Guèye

Head, Media Centre of Dakar

5. Khalil Guèye

Director, Generation TV

6. Safiétou Kane Ly

Media Programmes Director, Open Society Initiative for West Africa (OSIWA)

7. Babacar Kébé

Former Director, Haut Conseil de la Radio et de la Télévision

8. André Latyr Ndiaye

Clergy member, Archdiocese of Dakar

9. Oumar Seck Ndiaye

Director, Radio Oxyjeunes

10. Modou Ngom

Director of Communication, Ministry of Information

11. Alpha Sall

Secretary General, Syndicat des Professionnels de l'Information et de la Communication du Sénégal

12. Diana Senghor

Executive Director, Panos Institute West Africa

13. Mamadou Sèye

Director General, *Le Soleil*

14. Fatoumata Sow

Coordinator, Association des Femmes pour Communication Alternative

15. Jacques H. Sy

Executive Director, Aid Transparency

The 15 interviewees consented to being quoted directly and identified. A media practitioner from the public sector declined to be quoted.

Sierra Leone

1. Valnora Edwin

Executive Coordinator, Campaign for Good Governance

2. Ibrahim Ben Kargbo

President, Sierra Leone Association of Journalists (SLAJ)

3. Betty Foray

Editor, *Evening Scoop*

4. Julius Spencer

Executive Director, Premier Media Marketing

5. Charles Mambu

Executive Coordinator, Coalition of Civil Society and Human Rights Activists

6. Isaac Massaquoi

Coordinator, CORENT Community Radio

7. Gibril Foday Musa

Trainer and Public Information Coordinator, Talking Drum Studios

8. Awoonor Richie Gordon

Editor, *Peep!* magazine

9. Peter Ngutaung

Media Officer, United Nations Development Programme (UNDP), and Lecturer, Mass Communications Department, University of Sierra Leone

10. Francis D.D. Ganda

Executive Secretary, Independent Media Commission

11. Sahr Mbayo

Chief Trainer, Initiative for Mobile Training for Community Radio (Informotrac)

The 11 interviewees consented to being quoted directly and identified. Two NGO representatives declined to be quoted.

Somalia

1. Bobe Yusuf

Programme Officer, Academy for Peace and Development

2. Abdulkadir Khalif

Acting Program Officer, Somali Organisation for Community Development Activities (SOCDA)

3. Zamzam Ahmed

Coordinator, Somali Women's Journalist Association

4. Haji Abdi Gobdon

General Manager, Global Media Corporation

5. Omar Qadi

Former Dean; Analyst: Mogadishu University

6. Mohammed Said

Director-General, Somaliland Ministry of Information and National Guidance

7. Hassan Heiss

Head of Distance Learning Journalism Training, University of Hargeisa

8. Abdilahi Mohammed

Editor, *Mandeeq* daily newspaper.

The 8 interviewees consented to being quoted directly and identified.

South Africa

1. Kubi Rama

CEO, Gender and Media Southern Africa

2. William Bird

Director, Media Monitoring Project

3. Matthew Buckland

Online Publisher, *Mail & Guardian Online*

4. Justin Arenstein

President, Association of Independent Publishers

5. Joel Netshitenzhe

CEO, Government Communication and Information System (GCIS)

6. Eugene Saldanha

General Manager, Print Media South Africa

7. Ferial Haffajee

Editor-in-Chief, *Mail & Guardian*

8. Jacob Ntshangase

Executive Director, Institute for the Advancement of Journalism (IAJ)

9. Libby Lloyd

CEO, Media Development and Diversity Agency

10. Professor Pedro Diederichs

Head, Department of Journalism, Tshwane University of Technology, Pretoria

11. Dr Guy Berger

Media Analyst and Head of School: Journalism and Media Studies, Rhodes University, Grahamstown

12. Snuki Zikalala

Managing Director, South African Broadcasting Corporation (SABC)

13. Tula Dlamini

National Director, Media Institute of Southern Africa (MISA), South African Chapter

14. Virginia Magwasa-Setshedi

Director, Media and Information Communication Technology Programme, Freedom of Expression Institute (FXI)

15. Deon Du Plessis

Publisher, *Daily Sun*

The 15 interviewees consented to being quoted directly and identified.

Tanzania

1. Mary Janeth Rusimbi

Executive Director, Tanzania Gender Networking Program

2. Helen Kijo-Bisimba

Executive Director, Tanzania Legal and Human Rights Centre

3. Mary Mwingira

Executive Director, Tanzania Association of NGOs

4. Ananilea Nkya

Executive Director, Tanzania Media Womens' Association (TAMWA)

5. Mr Mushoro

Deputy Director, Ministry of Information, Culture and Sports

6. Boniface Byarugaba

Assistant Editor, *The Daily News*

7. Joyce Mhavile

Managing Director, ITV, Radio One and Sky FM

8. Mr. Buzwahera

Branch Manager, Sahara Communications and Publications Ltd.

9. Ritha Paulsens

Managing Director, Benchmark Productions

10. Jenerali Ulimwenga

Commentator, Chairman, Habari Corporation

11. Professor Mwesiga Baregu

Head, Department of Political Science, and media analyst, University of Dar es Salaam

12. Esau Ntabindi

Head, Department of Journalism, Tumaini University

13. Nkwabi Mwanakilala

Head, Department of Printing Media, Saint Augustine University

14. Rose Haji

National Director, Media Institute of Southern Africa (MISA), Tanzania Chapter

15. Albin Saragu

Minister for Academic Affairs 2005/2006, Dar es Salaam Student Organisation

Uganda

1. Philip Besiimire

Marketing Communications Manager, Mobile Telephone Network (MTN)

2. Dr James Nsaba Buturo

Former Minister of State for Information

3. Joachim Buwembo

Managing Editor, *The Daily Monitor*

4. Monica Chibita

Senior Lecturer, Mass Communications, Makerere University

5. Samuel Nabasa Gumah

Country Director, Uganda Radio Network

6. Robert Kabushenga

Director, Uganda Media Centre, Office of the President

7. Charlotte Ntulume Kawesa

Information Officer, World Food Programme and Lecturer, Mass Communications, Makerere University

8. Kagole Kivumbi

Director of Information, Ministry of Information and Broadcasting

9. Margaret Masagazi Sentamu

Executive Director, Uganda Media Women's Association

10. Charles Seruga Matovu

Presenter, Radio Star 100 FM

11. Lydia Mirembe

Public Relations Officer, Uganda Red Cross

12. Julius Mucunguzi

Communications Officer, World Vision International

13. Dr Peter Mwesige

Head of Department, Mass Communications, Makerere University

14. Ibrahim Ssemujju Nganda

Political Affairs Editor, *The Weekly Observer*

The 14 interviewees consented to being quoted directly and identified. An NGO representative declined to be quoted.

Zambia

1. Elias Banda

Coordinator, Zambia Community Media Forum

2. Amos Chanda

President, Press Association of Zambia

3. Fanwell Chembo

National Director, Media Institute of Southern Africa (MISA), Zambia Chapter

4. Margaret Chimanse

Chairperson, Zambia Media Women's Association

5. Shula Habeenzu

CEO, Communications Authority of Zambia

6. Ben Kangwa

Director of Programmes, Zambia National Broadcasting Corporation

7. Leonard Kantumoya

Lecturer, Department of Mass Communication, University of Zambia

8. Goodwell Lungu

Executive Director, Transparency International

9. Kenny Makungu

Head of Department, Department of Mass Communication, University of Zambia

10. Fred M'membe

Editor and Managing Director, *The Post*

11. Lucy Muyoyeta

Chairperson, Non-Governmental Organisations Coordinating Council

12. Antonio Mwanza

President, University of Zambia Student Union

13. Bestone Ng'onga

Executive Director, Media Trust Fund

14. Moses Odhiambo

Country Manager, Steadman Research Services

15. Elizabeth Pemba

Managing Director, Radio Phoenix

The 15 interviewees consented to being quoted directly and identified.

Zimbabwe

1. Sinikiwe Msipa-Ndebele

Director, Federation of African Media Women of Zimbabwe

2. Hon. Leo Mugabe

Chairman, Parliamentary Portfolio Committee on Transport and Communications, ZANU-PF, and Member of Parliament for Makonde

3. Dumisani Muleya

News Editor, *Zimbabwe Independent*

4. Irene Petras

Programmes Coordinator, Zimbabwe Lawyers for Human Rights

5. Thomas Deve

Chairman, Media Institute for Southern Africa (MISA), Zimbabwe Chapter

6. Tendai Chari

Board Chairman, Zimbabwe Television, and Media Lecturer, University of Zimbabwe

7. Stanford Matenda

Head of Department, National University of Science and Technology, Bulawayo

8. Margaret Zunguze

Director, E-Knowledge for Women in Southern Africa (EKOWISA)

9. Mathew Takaona

President, Zimbabwe Union of Journalists

10. Brenda Burrell

IT Manager, Kubatana NGO Network

11. Moses Charedzera

Media Lecturer, Zimbabwe Open University

12. Tafataona Mahoso

Chairman, Media and Information Commission

13. Charles Mangongera

Independent Media and Political Analyst

14. Kholiwe Nyoni

Marketing Manager, Radio Dialogue FM

The 14 interviewees consented to being quoted directly and identified. A senior executive of a government department declined to be quoted.

Pan-Regional Interviewees

East

1. Dr Johnson Nkuuhe, former Member of Parliament and current UNDP Project Coordinator, Uganda
2. David Ndi, Independent Economic Consultant, Kenya
3. Aidan Eyakuze, Director of Programmes, Society for International Development, Tanzania
4. Professor Fredrick Juuko, Media law lecturer, Faculty of Law, Makerere University, Uganda

South

1. Colleen Lowe Morna, Executive Director, Gender Links and Chairperson, Gender and Media Southern Africa network (GEMSA), South Africa
2. Ransford Antwi, Director of Training, Southern Africa Media Training Trust (NSJ), Maputo, Mozambique
3. Kaitira Kandjii, Regional Director, Media Institute of Southern Africa (MISA), Windhoek, Namibia
4. Daniel Molokele, Regional Coordinator, Southern African Editors Forum (SAEF), Johannesburg, South Africa
5. Jaqueline Kabeta, Director, Southern Africa Institute for Media Entrepreneurship Development (SAIMED), South Africa
6. Charles Mundale, Chief Executive Officer, Southern Africa Media Development Fund (SAMDEF), Gaborone, Botswana

West

1. Tunde Adegbola, Executive Director, African Languages Technology Initiative (ALT-i) and President, Technology Initiatives of West Africa (TIWA), Nigeria
2. Professor Alfred Opubor, Executive Director, COMED, a media consultancy based in Cotonou, Benin and Secretary General of the West African Newsmedia and Development Centre (WANAD)
3. Professor Kwame Karikari, Executive Director, Media Foundation for West Africa (MFWA), Accra, Ghana
4. Amie Joof-Cole, Executive Director, The Inter-African Network for Women, Media, Gender and Development (FAMEDEV), Senegal
5. Fatou Jagne-Senghore, Programme Officer for Africa, Article 19, Senegal

International Interviewees

1. Mogens Schmidt, UNESCO Deputy Assistant Director General, Communication and Information, and Director, Freedom of Expression, Democracy and Peace Division, UNESCO, Paris
2. Myles Wickstead, former Head of Secretariat, Commission for Africa, the Commission for Africa Report, London
3. Aidan White, Chief Executive, International Federation of Journalists (IFJ), Brussels
4. Melanie Walker; RAP 21 (World Association of Newspapers), Paris
5. Tim Carrington & Marco Mantovanelli, World Bank Manager, External communication group of the World Bank for Africa
6. Richard Dowden, Director, Royal African Society, and journalist, London
7. Hilda Johnson, Senior Advisor, African Development Bank, and former Norwegian Minister of International Development
8. Forward Maisokwadzo, Communications Officer, Refugees, Asylum-seekers and the Media RAM Project Mediawise Trust, UK
9. Paddy Coulter, Director, Reuters Journalism Fellowship Programme, Oxford, UK
10. Kitty Warnock, Communication for Development Senior Advisor, Panos, London
11. Alison Campbell, Regional Manager for Africa Programmes, Internews Network, Cape Town, South Africa
12. James Deane, Managing Director, Communication for Social Change Consortium, New Jersey, USA

Appendix C: Journalist Pay

Angola

- ❑ State journalism enjoys better overall remuneration (when benefits are included) than private journalism.
- ❑ Journalists are generally paid between US\$55-US\$200 yet state journalists receive added benefits such as credit cards for food shopping, housing and child support.

Botswana

- ❑ No remuneration statistics were available at the time of publication of this report.
- ❑ In general, journalist standards remain low and underdeveloped due to lack of media reforms, underdeveloped media markets and lack of professional standards and codes of conduct.

Cameroon

- ❑ State media employees are paid the same average monthly salary as a teacher (US\$300).
- ❑ Private media employers generally poorly remunerate journalists.
- ❑ Non-state journalists expect payments from those covered in their reporting.

DRC

- ❑ In most cases, there is no employment contract between the employer and the journalist. The journalist is not protected by law and vulnerable to the owner's whims.
- ❑ Many journalists resort to seeking payments from the people and organisations they cover, negatively impacting journalistic balance and fairness.

Ethiopia

- ❑ The profession is not well-paid, and journalists tend to be very young.
- ❑ The average monthly salary for a journalist in government media is estimated at US\$80, and for those who work in private media it is US\$50-60¹⁰³. By comparison, a newly-qualified teacher earns approximately US\$90 per month.

Ghana

- ❑ Journalists are in general not well-remunerated but better than a school teacher (slightly over US\$100 per month).
- ❑ Pay can range from newspaper starting pay at less than US\$100 per month to US\$1,000 at some of the more popular private FM radio stations. The government-owned Daily Graphics Newspapers group pays as high as US\$400 per month for a reporter¹⁰⁴

Kenya

- ❑ A permanently working journalist's remuneration ranges between US\$277 and US\$3,472 per month, with an average of about US\$1,875. This average is deceptive, given that the majority of permanently employed journalists in the country earn below US\$555 per month. By comparison, secondary school teachers in the country earn about US\$600 a month, more than most journalists.
- ❑ 80% of all journalists in Kenya are not permanent employees, but are instead employed as "correspondents". Thus, they are not on regular pay and depend on short contracts, typically earning as little as US\$100 per month.

- 75% of all newspaper content is generated by correspondents. According to Moggi and Tessier (2001), raising the status of journalists in the country would be one of the best and most efficient ways of improving standards.

Mozambique

- Journalists in Mozambique are generally poorly paid. The average monthly salary is equivalent to around US\$150.
- The low pay is mainly due to the fact that media companies are very poor themselves, and generally there are no government policies aimed at promoting the development of the media sector.
- Compared with other professions (for example the minimum teacher's pay of US\$75 per month), journalists are relatively well paid.

Nigeria

- Journalists' pay packages are generally on par with pay levels in the public service.
- However, print journalists often go unpaid for months, and seek payment from the people and organisations they report on.
- Overall, the average pay for journalists is said to be US\$167-US\$200 per month (US\$2,000-US\$2,400 per year).

Senegal

- Journalists' average pay (US\$300 per month) is very low compared to many other professions; state teachers earn twice as much. This has generated much corruption in the trade and has resulted in what some call the culture of "per diem-isation", money distributed by conference organisers to participants and reporters.
- There is concern that the provisions of union-negotiated collective agreements related to salaries are not enforced (Diagne, 1985:15).
- Many journalists work on a freelance basis, and newcomers to the profession are ferociously exploited. Media owners acknowledge this situation and generally argue that the collective agreements do not match their financial capacities (Diagne, 1985).

Sierra Leone

- Generally speaking, salaries of media practitioners are low and some journalists seek favours and gratuities from the people they write about
- A Sierra Leone Broadcasting Service (SLBS) news editor's monthly salary is US\$83 to US\$133. Meanwhile a junior reporter for a newspaper in Freetown can expect US\$50 to US\$68 per month. University-educated teachers take home roughly US\$78 per month.

Somalia

- Journalists earn on average US\$60¹⁰⁵ per month. In comparison, teachers earn on average US\$30 per month in the public sector and US\$100¹⁰⁶ per month in the private sector.

South Africa

- Journalists' salaries vary significantly across media companies, sectors (public, private and community), specialisations (print, radio and TV) and even journalism topics (politics, business and so on). The top salaries go to those who work for major media companies in the big cities of Johannesburg and Cape Town.

- In general, journalists, nurses and teacher salaries are generally at the low end of the salary scale in South Africa with the average teachers' pay being US\$13,000 per year (F. Hugo, South African Democratic Teachers' Union, personal communication with Country Researcher, 2006).

Tanzania

- The monthly salary for an average employed journalist ranges from US\$58 to US\$72, and freelancers are paid an average of US\$0.80 per story or photograph used. This is less than the official minimum wage of US\$36.
- It is very common for journalists attending training workshops to be more interested in the allowance that the funding agency provides than in the training itself.
- The poor pay of journalists has also led to the flourishing of "envelope journalism", in that journalists are paid by the people or organisations they write about.

Uganda

- Journalists are paid relatively well compared to other occupations such as teaching. The monthly salary in 2005 for a Grade 5 secondary school teacher was approximately US\$165 per month (BBC, 2005), while pay for journalists can range from US\$190 for a freelancer to US\$380 or even US\$3,200 for salaried employees.
- The scale of journalist pay varies greatly between media houses¹⁰⁷.

Zambia

- Journalists are among the most low-paid workers in Zambia, both in state and private media companies.
- According to M'membe (Banda, 2004), the lowest-paid worker at the *Post* gets no less than US\$300 per month. This is compared to an approximate average teacher's pay of US\$250 per month.
- Low pay has resulted in the most talented leaving for the private sector, mostly to work as public relations officers.

Zimbabwe

- Zimbabwean journalists experience unfavourable working conditions, including poor salaries and a low skills base due to lack of training and poor infrastructure.
- These difficulties have affected morale and the quality of stories, with most journalists preferring to sell their investigative pieces to foreign media houses or to receive "consultancy" or "settlement" fees to protect certain corrupt business people from negative publicity.

End Notes

¹⁰³ Source: K. Mulat, personal communication, 1 September 2006.

¹⁰⁴ Source: B.K. Blewu, personal communication (telephone), 16 May 2006.

¹⁰⁵ Country researcher's personal estimate, based on author's personal work as a journalist.

¹⁰⁶ Country researcher's personal estimate. In the Somalian private sector, teachers mostly teach the English language, which has the largest enrolments and is highly marketable.

¹⁰⁷ Source: D. Malinga Doya, personal communication with country researcher, 15 August 2006.

African Media Development Initiative Country Report PDFs

This Research Summary Report of the findings of the African Media Development Initiative (AMDI) provides a unique set of insights showing how donors, investors, media and media development organisations can collaborate in supporting and strengthening Africa's media sector.

The Initiative was the most extensive independent survey of the state of the media across 17 sub-Saharan African countries: Angola, Botswana, Cameroon, Democratic Republic of Congo, Ethiopia, Ghana, Kenya, Mozambique, Nigeria, Senegal, Somalia, South Africa, Sierra Leone, Tanzania, Uganda, Zambia and Zimbabwe.

Copies of the individual country reports are included as PDFs on the enclosed CD.

African Media Development Initiative Research

This report is one of 18 produced as part of the African Media Development Initiative Research Project, completed in 2006. To obtain a copy of any of the following reports, please visit: www.bbcworldservicetrust.org/amdi

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