



Promoting freedom, responsibility and professionalism of the media

MEDIA BUSINESS GROWTH WITH CAPACITY NEEDS ASSESSMENT

REPORT

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ABBREVIATIONS AND ACRONYMS

| | | |
|----|-----------------|---|
| 1 | ARFEM | Association Rwandaise des Femmes des Médias |
| 2 | BBC | British Broadcasting Corporation |
| 3 | BCR | Banque Commerciale du Rwanda |
| 4 | BK | Bank of Kigali |
| 5 | BNR | Bank Nationale du Rwanda |
| 6 | BRD | Banque Rwandaise de Developpement |
| 7 | DFID | Department for International Development |
| 8 | DTR/DTT | Digital terrestrial radio/television |
| 9 | DTV | Digital Television |
| 10 | EDPRS | Economic Development and Poverty Reduction Strategy |
| 11 | FM | Frequency Modulation |
| 12 | MFWA | Media Foundation for West Africa |
| 13 | MININFOR | Ministry of Information |
| 14 | NICI | National Information and Communication Infrastructure |
| 15 | NMC | National Media Commission |
| 16 | RMB | Rwanda Media Barometer |
| 17 | STB | Set top box |
| 18 | UNDP | United Nations Development Program |

EXECUTIVE SUMMARY

Preamble

The Media High Council (MHC) is a public and independent institution established by the constitution of the Republic of Rwanda of 2003 in its article no. 34, governed by the Law n° 03/2013 of 8/2/2013 determining its mission, organization and functioning. The statutory mission of the Media High Council is to empower the media sector for development through capacity building. It commissioned this study to undertake initiatives to strengthen the media industry that will advance the growth and sustainability of pluralistic and diversified media landscape in Rwanda.

The study was guided by the four objectives: to identify the general challenges that print and community-based media are facing and propose strategies to address them, to conduct capacity needs assessment for media business management, to assess media industry challenges associated with adaptation to the digital media revolution, and to suggest ways on how print and broadcast media can access financing and other alternative income generating streams for their business growth and economic viability.

Research Methodology

This research applied a mixed method of data collection to address its multiple specific objectives. It involved the use of both quantitative and qualitative techniques in collecting views from different respondents. The quantitative phase involved collection of data through face-to-face interviews, using pre-coded questionnaires to identify challenges that media sector is facing and get proposed solutions from media practitioners. 170 total questionnaires administered on the media practitioners (i.e. journalists, chief editors and media managers) were conducted in December 2013.

The qualitative phase involved in-depth interviews with 22 representatives of different media shareholder institutions, including media partners, training institutions, civil society, content producers, media investors, private sector and government institutions who provided their views about media sector development in Rwanda. Focus group discussions were also used to collect views from among media and technology experts. Before data collection, a desk research was held to get a general picture of the media sector in Rwanda. Sample selection was based on judgemental sampling method for qualitative data, and random sampling method for quantitative data.

Key findings

General challenges faced by print media in Rwanda

- 84% print media practitioners have preferred to print out newspapers in Uganda for the cost is slightly less than the one in Rwanda. However, they have revealed the difficulties based on travelling a long distance which delays the availability of newspapers on the market;
- 58% of interviewed journalists and print media managers have claimed that the government does not support them financially through access to public advertisements;
- 44.4% of street buyers of newspapers have faced to the higher price of newspapers. For example some newspapers have minimum price of between 500 rfws and 1,000 rfws

which is most likely higher compared to the purchasing power of an ordinary Rwandan citizen¹.

- Journalists and newspapers have been underestimated in the Rwandan society as an issue raised by 31.8% of the interviewees;
- The lack of offices has been an important barrier to development of print media as mentioned by 31.27% of print media practitioners;
- The lack of recognized market for newspapers has been raised by 28.6% of the respondents as a serious barrier to the investment in print media;
- The lack of distribution network has been also identified as a challenge where 21% of the respondents said that newspapers are concentrated in Kigali City, while people from other regions of the country do not have access to them;

These identified challenges indicate the root cause of poor performance for newspapers as a result of poor content. The consequence is that print media attract fewer readers, advertising and investors.

General challenges community-based media face

Community-based radios have a problem of categorization, where some of them are not classified to the basis of its target areas and or audience. The lack of appropriate classification and confusion of objectives do not help the decision makers to build the sector. They have also a big financial problem, they are not autonomous and consequently do not have competitive managers.

Media business management gaps

The findings of the study indicate that some media managers work without business management tools as follows:

- The capacity-building plan was found as the most lacking planning tool, where 78% of the interviewed managers do not have it;
- 67% of media managers interviewed agreed that they work without business plan.
- Strategic plan is not used by 56% of media managers;
- The market and action plan were confirmed as lacking tools by 51% of respondents;

Challenges associated with adaptation to the digital media revolution

On the issue of digitalization, the findings show that the country has started switching to digital system but there are some challenges as follow:

- The lower level of awareness of digitalization confirmed by 25% of the respondents in this research;
- Limited ICT skills sets required for its sustainable growth;
- The absence of a Last Mile network was also identified as challenge, since the percentage of households with internet access was 3.2% in 2010 and 5.0% in 2011²,

¹ CONSUMER PRICE INDEX (CPI) National Institute of Statistics of Rwanda, July 2013

- ICT penetration is still at lower stage considering the percentage of households with a computer which was 1.3% in 2010 and 2.0% in 2011³,
- ICT awareness and literacy rate at community level remains poor, see that computer literacy rate (% ages 15 and older) was 3.3% by 2012;
- Higher costs associated with the adaptation to digitalization were also identified as a challenge,

How print and broadcast media can access finances and other alternative revenues

Furthermore, the findings indicate that media businesses in Rwanda are still struggling. Despite growing efforts to transform the industry (increased capacity building, improved infrastructure, policy reforms, etc), most media are still at low level in realizing competitive potential. The reasons given for this state of affairs are legion low operational sustainability (few sources of funding, poor media consumption patterns, high costs of production, inadequate media managerial skills, fragmented market, threat of new media, etc. To be more competitive, it was also emphasised that media could operate in convergence to beat production costs and influence of economies of scale, improve their marketing strategies, do more networking and peer reviews, and advocate for government funding since they exist for public interest.

Capacity building needs for media business management

Institutional capacity building gaps and challenges:

- Limited numbers of experienced journalists since 63.3% of journalists have spent less than five years in media sector and 57% of managers have not yet been spent over 10 years.
- Female managers are still few in media and have little experience by which 35% of women proving a working experience of only 5 years in print media section while 65% men have the same working experience. On the range of 5-10 years, 100% are men and over 10 years around 100% are men and 0.16 women at least;
- For broadcast media women prove the difference with 8% for long-lasting work experience over 5-10 years. Men are still dominant in broadcast media management team, with 5 years and over 10 years of work experience;
- The 95% of print media outlets are not financially viable, which is the main cause of poor salary scales and lack of contracts;
- The 90% of media houses' staff confirmed to have not adequate skills in information technology
- The 68% of media houses' managers in print media do not have funds or budget plan for training of the personnel;
- 48% of journalists have permanent contracts; 41% journalists are working under other forms of contracts (like verbal monthly contracts), and 59% journalists are interacting with media houses managers on daily basis as freelancers;

² Rwanda ICT Sector profile 2012

³ Idem

- 40% of media managers have proved to have lower level of business management skills. In addition, trainings need more emphasis on side of the administrative and marketing staff.
- Media business entities are concentrated in Kigali. As estimated by the media houses' managers, Kigali City is where located 23 of 32 radios and three recognised TVs. Then 10 radios and TVs cover 80% of Kigali.
- 63.16% of radios and TVs have business plans, 52.63% have strategic business plans, which are more important for the business life. However, 52.63% of radios and TV do not have marketing plan and yearly action plan and something bad for this segment, 78.95% of them do not rely on capacity building plan.
- 79% of print media managers confirmed to have bank accounts, but only 76% of them accept to pay their staff through banks accounts. 76% managers acquired loan from the bank to improve or implement the life business.
- The 80% of broadcast media outlets are okay on one side, with their working rooms including studios but on the other side, 80% of managers confirmed to have internet connection problem. The 70% of managers have adequate office furniture, while 30% do not. The challenge remains one of ICT skills and internet connection. Media business is very constrained by slow internet connection.
- Print media houses are not able to pay for trainings for their staff at 68%. some of print media houses like New Times and Imvaho could pay for trainings of their staff. Only 14% broadcast media houses are able to pay fees for trainings. The partnership is still needed to build capacities of media houses.

Individual capacity building gaps and challenges:

- A big number of journalists representing 42.4% benefited from their trainings in short courses while still at their work. 28.4 % benefited from them by training themselves. This case is similar to the one for managers representing 48.5% who did trainings by themselves. This means that either managers or journalists have started their careers without being professionally trained the reason why there is lack of quality in what they do. A small number of journalists (19.7%) and managers (9.1%) only have received long-term trainings (of over 6 months). The additional skills needed are economic and business, advertising, education, social welfare, science and technology, politics and investigative journalism, entertainment, culture and show business;
- Concerning the place where journalists and managers received their trainings, 43% of them have been trained only in Rwanda. Especially 71.9% of journalists who had additional trainings appreciate to be trained within the country.
- 26.9% of journalists and managers who have preferred to be trained abroad must be oriented in the fields that lack more personnel than the others in Rwanda. Otherwise, 36.1% of managers preferred on job trainings, 13.9% journalists preferring on job training compared to 24.7% preferring short-term courses, and 19.3% for mentoring and coaching. Depending on the types of training method, business is linked to profitable method in terms of time consuming, money required and nature of training and its conducting place;

- For broadcast media, the more needed areas to improve are reporting at 78%, editing at 44%, presentation at 22% and production at 22%. For print media the more needed areas to improve are camera at 48%, reporting at 42%, presentation at 30%, production and design at 26% and editing at 22%;
- The 90% of media managers are in great need of updated digital and IT tools as means to successful working conditions. Financial stability comes at first place more needed than any other thing in media, meaning that almost every media outlet in Rwanda searches for financial stability, interesting program and supportive environment needed at the level of 65% and 60% level of need of skilled and responsible human resources (including journalists).

Recommendations

Basing on challenges noticed during the exercise, some suggestions were highlighted to address different problems in the media as follows:

a) Proposed strategies to address challenges print media face in Rwandan

To address the challenges print media faces in Rwanda, several strategies were proposed by the respondents and the researcher as follows:

- Qualitative data of this assessment has indicated the low rate of readership in Rwandan society results in the reduction of the number of people who buy newspapers. In this case, it is suggested that on one side media should endeavour to build and gradually grow their own readers, and on the other side government institutions should promote the reading culture in the society;
- A media development loan fund should be set up to support media. Rwandan government or other interested parties could be approached to explore such an opportunity for funding;
- Professionalism and capacity building should be emphasised. Media High Council in collaboration with Rwanda Media Commission should make a regular report on the level of professionalism, rank media houses, advise them and conduct trainings, workshops, study visits and other forms that can help in capacity building of the media;
- Media convergence is recommended where the 'weak' media explore ways of forming one strong media;
- A proper newspapers distribution network should be established;
- The newspaper content must be equated with the needs of the readers to attract customers and advertisers;
- Given the fact that some journalists do not have working contract, they often miss out some social services such as bank loans, since no one can believe they have jobs. This calls for a deliberate effort to protect journalists' rights and respect labour laws;
- More local and foreign investors should be encouraged to venture into the media sector, which depicts great potential. Rwanda is now a safe place, actually one of the most secure places on the continent as well as in the entire world, for any business to flourish;

- A regular seminar should be prepared by Media High Council, inviting investors with the main purpose of debating on media business management, commenting on the errors and the opportunities in the media sector,
- MHC should train media managers on media business management,
- Professionalism and capacity building should be emphasised,
- Print media competition with online media should be enhanced,
- Proper marketing and distribution strategies should be put into consideration,
- The use of business management tools is recommended for all media managers,

b) Community media

- The developing media sector must increase innovation in print community based media.
- There is a need to advocate for community radios in terms of legal status because the current media law does not distinguish community radios from other radio categories.
- Media managers, technicians and other staff should be provided trainings, either locally or abroad. There should be organized study tours in advanced community radios, outside Rwanda and specific trainings on investigative journalism are needed.
- Transport facilities should be provided with for community radios staff to cover stories for the intended audience in the remotest villages.
- The solution suggested is that taxes should be exonerated for the non-profit media organs.
- There should be regular financial support from the State to community media which aim the professional purposes. The faith based community media should not be concerned by such financial support.

d) Digitalization

- A strong campaign to sensitize audiences for the need to invest in digital migration would be backed up by the benefits provided by DTV: better sound and pictures, high definition TV, more channels, quality content, higher interactivity with audiences, etc.
- With the advent of digital broadcasting, the government should subsidise the digital migration infrastructure such as STBs, to offer subsidies on newsprint, to ensure that the technology reaches as many citizens as possible;
- The migration should be done in gradual steps (not one big leap) considering the means of the audiences;
- Media should embrace new technologies that enable interactivity with each of the identified audiences. All media houses should join the bandwagon of new media (internet, social media, etc) to specifically target diversified interests of the audiences with rich local content;
- Journalists, chief editors and media house owners should be familiar with digital systems for enhanced media services. In this context, there is a need of trainings, study tours, short courses, etc in field of digital system;

- The media managers have fear that the cost of renting the transmitting antenna from RBA and license fees will be increased with digitalization. That fear results in the fact that all radios will extend their coverage overall national territory through the same bandwidth and the same transmitter of the DTR/DTT (digital terrestrial radio/television). It is recommended for all media stakeholders to act as soon as possible so that the stated fees should be affordable to all media houses and if possible, subsidies should be provided with for them.
- For print media to fit onto digitalization, newspapers should have the hard copy and the online version, their website and compete to put as much information as possible in order to sell to other media organs.
- For radio stations to fit onto digitalization, they should optimise their production in a way they can be broadcasted on internet as well as on the Digital TV. The nationalization of the digital signal is an opportunity to widen the coverage of existing radio broadcasting stations where all radios even community ones will be listened to throughout the country.
- For television fitting onto digitalization, the quality of programs and presentation should be the first emphasis. Professionalism should be a motto of journalists' everyday life. The Rwanda TV will no more have little viewers; it will instead have many terminal users. They must capture no difference of quality when zapping from an international to local channels.
- For online media to fit onto digitalization, it must include among the proposals a window to present videos and radio in streaming or in podcast, or to present a complete TV online. That online TV would be the first step to become a complete Digital TV online if they are financially able to create and raise it as a main online activity.
- There is need to train the next generation about 'digital journalists' to prepare for the new media revolution.

e) Strategic recommendations for media outlets to access to finances and achieve economic stability

a) Media Sector and Media Practitioners

- Media outlets owners should endeavour to reinvest their earnings/profits in their staff to keep them motivated and enhance professionalism and subsequent profitability;
- Media should endeavour first to build brand, not the numbers. The number of newspapers in circulation is not necessarily an indicator of profitability. Media should focus on building strong brands as a prerequisite for achieving profitability;
- Industry players should consider conducting collective/joint research studies to learn the market and understand audience and readership dynamics;
- In the future, vertical growth of media through convergence will be a viable way of ensuring long-term profitability and survival of media enterprises in Rwanda;
- Media practitioners should organize themselves and know where to tap the financial resources to fund such ventures; lenders need to ‘understand media industry specificities and consider these while deciding on their lending terms more accommodative and less punitive for media sector. Lenders are interested in whether media managers understand the environment, trends and have solid revenue generation plans to support loan repayments;
- Media owners should endeavour to reinvest their earnings/profits in their staff to keep them motivated and enhance professionalism and subsequent profitability.

b) Policymakers

- To put in place strategic orientations by which the culture of reading might be reinforced by means of media literacy programs;
- The annual budget must clearly indicate the amount allocated to the media sector for the interest of freedom of expression and right to information, education and entertainment of the citizen;
- Government should spread their expenditures on advertising to both private and public media outlets. If government adverts go to the public media, these outlets will stifle private media houses.

c) Media training institutions

- Media training institutions should increase the number of trainees who might be interested in doing business in the media sector;
- The basics of entrepreneurship, with an emphasis on the specialized context of the media and information sectors are recommended;

d) Media development partners

- It should be relevant to adopt a mechanism desk that joins together the members of Private Sector Federation and media business owners and managers, with purposes of selling the role of media in business growth in Rwanda;
- Investors and other media development partners should take advantages of factors that favour the digital revolution;

e) Media High Council

- To conduct regular evidence-based seminar workshops on business content in media. The main purpose of that regular meeting should be to comment on errors and opportunities in the business content production;
- The Media High Council should conduct regular research to showcase the media company performances and widely publish them through a specific website;
- To advocate for the promotion of other infrastructures like tele-centers, kiosks and buses which has undoubtedly boasted internet usage to more than 12%, and enhanced public access to information. Indeed online publishing and advertising as well as the use of new media platforms is increasing by day, hence slowly threatening the survival of mainstream media;
- To facilitate the establishment of partnerships and networks between media professionals in Rwanda and those in the region and in developed countries, to enhance skills development;
- To establish processes for achievement of social security for journalists/media practitioners as well as remuneration that is proportional to their social role, and guarantee of their economic independence;
- To establish and implement a resource mobilization strategy to gather resources, to support capacity building projects for the media sector;
- To facilitate the creation of cooperatives for small and growing media organizations;
- To initiate industry/market, audience research projects and surveys informing the performance of media.
- To promote the gender performance in media staff and in media management.

Conclusion

Despite many challenges media sector faces in Rwanda, there is hope that the implementation of the recommendations from this research will contribute to the development of the sector. Trainings, short courses, study tours and on-the-job trainings have been identified as adequate ways to build capacity for media managers, and then get skilled in a way they can generate income for themselves and keep financial sustainability. Professionalism would enhance business and business management take in account the capacity building plan.

CHAPTER I: GENERAL INTRODUCTION

1.1 BACKGROUND OF THE STUDY

Through a recent review of the Law n° 30/2009, the mission and role of MHC was effectively changed from a regulatory body to an independent institution responsible for media capacity building under the new Law N°03/2013, determining the responsibilities, organisation and functioning of Media High Council (MHC). Its statutory mission is to empower the media sector for development through capacity building.

The media sector, as a way of preserving the concepts of social bonding within communities and promoting welfare of the community, should become a good business environment to attract investors. The Current Rwanda Media Barometer (2013) highlighted that 27.8% of media managers including business managers have access to trainings appropriate to their needs, which gives MHC an impetus to conduct a thorough study assessing capacity needs of the media industry, hence delivering trainings needed in the industry. In addition, following the ongoing digital revolution, the media industry needs to adapt to technological changes and innovations for transformation purposes. It was therefore imperative to have a study conducted, to highlight the transformational challenges the Rwandan Media Industry was facing, align itself to the ongoing digital media revolution and in effect propose policy and strategic actions to address the challenges.

The uniqueness of media business operations comes with specific and unshared challenges with other business entities in the private sector, thus hindering the growth of the sector. Basing on the above, MHC conducted a study to analyze media business growth and transformational challenges, with capacity building need assessment for the purpose of policy and strategic intervention. The invested efforts aimed at transforming the media sector into a vibrant, independent, professional, profitable and sustainable business, which will contribute to national development and good governance.

1.2 OBJECTIVES OF THE STUDY

a) General objective

The general objective of this activity was to generate reliable baseline data and appropriate or actionable recommendations as well as shared best practices, to guide strategic and policy interventions for sustainable growth of a strong and vibrant media in Rwanda.

b) Specific objectives

- Identify general challenges print and community-based media face in Rwanda, and propose strategies to address them;
- Assess media industry challenges associated with adaptation to the digital media revolution;
- Conduct capacity needs assessment for media business management so as to guide the undertaking of effective trainings;
- Suggest ways on how print and broadcast media can have access to finances and other alternative income generating streams for their business growth and economic viability.

1.3 INTEREST OF THE STUDY

The findings from this study provided Media High Council with an overview of challenges print and broadcast media face, and proposed strategies to address them. They have been also as guidelines to the policy and strategic planning for sustainable growth and vibrant media in Rwanda, and this will contribute a lot to the core mandate of the MHC to build media capacity in terms of professionalism, managerial system, digitalization, etc.

Media practitioners shall benefit from the research findings, as they shall be guided in improving their managerial system, developing important documents like strategic plan, business plan, action plan, capacity building plan and plan for adaptation to digitalization.

The public will benefit from this study in that the adopted changes in the sector will have a positive impact on the product they consume from media.

1.4 SCOPE OF THE STUDY

This study focuses on the current situation of media business in Rwanda. Four types of media organs are concerned: print, broadcast radio, television and online media. Beyond the radio category, a called community based media was particularly analysed in the same way as the print media. To identify challenges that print media and community-based radios are facing and propose strategies to address them is the main part of the study.

The analysis of the impact of digitalization on the media sector is a second preoccupation of the study. This leads to the understanding of how Information and Communication Technology (ICT) development is influencing the functioning of Rwandan media today.

The media sector is also studied as an economic sector, which needs to improve its revenue. The professional and financial aspects are scripted together. An assessment of challenges associated with business growth of the media industry, and suggestions on the ways on how media can have access to finances and other alternative income-generating streams.

The sector will necessarily require a capacity building plan. The study focuses at the institutional and individual gaps and assesses the capacity building needs at the end.

In addition, it focused on the implementation matrix of proposed appropriate and actionable recommendations. In terms of geographical delimitation, all media organs operating on the Rwandan territory had equal chances to be sampled.

CHAP 2: RESEARCH METHODOLOGY

2.1 TARGET POPULATION

The study targeted journalists, chief editors, media houses managers for quantitative and qualitative data; and public institutions, experts in media technology, media training institutions, media development partners, journalists associations, civil society organizations, private sector including banks for qualitative data.

2.2 METHODS OF DATA COLLECTION

The following methods were used:

- Quantitative method: data were collected using questionnaires. They were distributed to journalists, chief editors and media houses managers selected randomly from each media organ our sample rests on.
- Qualitative method: data were collected from media houses managers, journalists and chief editors our sample rests on, public and private institutions, as well as journalists' associations. During the process, we used interview guides, recorders and handwriting.
- Desk research or secondary research: We collected the existing relevant information to be used in comparison with best practices in developed media institutions, to add value to the objectives of the study. We consulted online publications, textbooks, government publications, academic publications, newspapers, reports, etc.
- Checklist and observatory method: Various aspects of media management were analysed through the observation and search of evidences. Equipments, human resources or financial data had some gaps, where our data collector wanted check and noted any revealed irregularity.
- Focus group discussions: The researcher invited experts in different disciplines such as marketing, technology, culture and training institutions, in order to debate on topics relating to the assignment, and a conclusion was drawn in the end of the debates.

2.3 DATA COLLECTION INSTRUMENTS

Data from field were collected by using structured questionnaires and interview guide for FGD and IDI. The amended questionnaire was pilot tested using 2 journalists, 1 chief editor, and 1 media manager. The pilot testing was done before the administration of the questionnaire to the selected sample. This was done to test the reliability of the questionnaire items. We consulted documentation on theories about business growth, media sector, media digitalization, capacity building assessment, etc. The documentation also included different

reports and research done by Media High Council Rwanda, like the “Five Year Gender Mainstreaming Strategy in the Media Sector”, the “Strategic Capacity Building Plan for Media”, the current media Law N° 02/2013, the Law N°03/2013 determining the responsibilities, organization, and functioning of the media high council (MHC), replacing the Law n° 30/2009 thus changing the MHC from a media regulator into a media capacity builder, etc.

Document review helped us to get information on the status of business in Rwanda media organs. It helped also know to which extent of the digital migration had been and the challenges associated with it and the image of human capital capacities in media sector.

In order to succeed with the checklist method, five points based on an ideal type of management were systematically focused: the product or services, the way they are produced and sold (prices), the targeted market and its size, and the marketing devise of the media organ.

General comments:

A focus group discussion method was used to identify the general comments on the idea of media business in Rwanda. One meeting was held in Kigali city including journalists associations, experts or experienced persons in conversant with the media sector.

Various questions were prepared and debated about business operating, marketing, social context, opportunity affairs, education and culture context, technology and digital migration.

Matrix guiding research achievement of the specific objectives

| Objectives/duties | Methods | Source of data | Tools for data collection | Target audience/ respondents | Expected results |
|---|--|----------------------------------|---|---|---|
| 1) Identify general challenges (and associated factors) by print and community based media in Rwanda; | -Structured interviews on selected respondents sample -Qualitative in-depth Interviews -Secondary research (Desk research) | Literature review Respondents | Questionnaire Interview guide | -Journalists and media managers -Specialized institutions | -The social status of journalists understood -General challenges identified |
| 2) Assess media business industry (including broadcast and online media) challenges and factors associated with adaptation to the digital media revolution; | Structured interviews on selected respondents sample - Qualitative In-depth-Interviews - Desk secondary research | Experts respondents | Questionnaire Interview guide Focus group discussions | - Printers - distributors - Media managers -Technician -Decision makers | - possible financial intervention by the State, etc - analogue TV owners motivated to replace them with digital ones |
| 3) Suggest ways on how | -Desk analysis of | Experts | Questionnaire | Institutions | - new needs for |

Media business growth and transformational challenges with capacity building needs assessment

| | | | | | |
|---|---|-------------|--|--|---|
| print, online and broadcast media can access finances and other alternative revenue generating streams for their business growth and economic viability: <i>Design implementation matrix of proposed appropriate and actionable recommendations and strategies.</i> | case studies | respondents | Interview guide Focus group discussions | Media managers Experts | the journalists' job market identified - new financing models |
| 4) Conduct Capacity needs assessment for Media business management to guide the undertaking of effective trainings: <i>Develop a filled or complete template for regular data collection for purposes of guiding MHC monitoring and evaluation initiative of media business performance.</i> | Structured interviews on selected respondents sample -Qualitative In-depth-Interviews - Desk research | Respondents | Questionnaire Interview guide | Journalists and media managers Training schools directors | Training method /content aligned with the job market and media growth needs Performance indicators established |

2.4 SAMPLE SIZE AND SAMPLING TECHNIQUE

The study was conducted on the population selected using Stratified Random Sampling method from media houses, i.e. media managers, editors and journalists, while purposive or judgemental sampling technique was applied to select institutions or organisations from which qualitative data were administered.

a) Calculating Sample Size for Stratified Random Sample

The following methods were applied to calculate the number of fixed plots needed in the sample. Following is the sample size calculation process:

- Specify the sampling error objective for the population as a whole,
- Stratify the population into sampling components. The purpose is to reduce the coefficient of variation within the sampling strata,
- Calculate coefficient of variation (CV) by stratum and a weighted CV over all strata.
- Calculate number of plots for the journalists, editors, managers as a whole, then allocate by stratum.

b) Description of stratum:

➤ **Journalists' stratum**

Journalists were sharing the same character in production, analysis, reporting and airing media content and they can probably face the same challenges-caused factors, as well as capacity needs for media business management and digital challenges.

➤ **Electronic Media Editors' Stratum**

Those chief editors of online and broadcast media day to day can face the same professional issues regarding journalism ethics, digital challenges etc...

➤ **Print Media Editors' Stratum**

Those chief editors of print media day to day can face the same professional issues regarding journalism ethics, digital challenges etc...

➤ **Electronic Media Managers' Stratum**

As other business managers, the uniqueness of media business operations comes with specific and unshared challenges with other business entities in the private sector thus hindering sector growth. Online and broadcast media business managers have almost the same constraints about media business growth, transformational challenges and capacity building needs.

➤ **Print Media Managers' Stratum**

Print media business managers have almost the same constraints about media business growth, transformational challenges and capacity building needs.

This procedure is illustrated in the following table using the preliminary data on journalists, editors and media house managers provided by MHC:

d) Distribution of the population towards sample size

| Stratum | Total volume from each stratum | Volume fraction (vfh) | Mean | Standard deviation | Coefficient of variation (CVh) |
|-----------------|---------------------------------------|------------------------------|-------------|---------------------------|---------------------------------------|
| Journalists | 555 | 0.73 | 151 | 50.05 | 33 |
| Online Editors | 69 | 0.09 | 13.8 | 5.6 | 41 |
| Print Editors | 48 | 0.05 | 9.6 | 0.89 | 1 |
| Online Managers | 69 | 0.09 | 13.8 | 5.6 | 41 |
| Print Managers | 50 | 0.05 | 8.3 | 2.5 | 30 |
| Total | 763 | | | | |

Given an allowable error percentage (A) equal to 5%, calculate the number of plots needed for all stratum (n). Use a t-value of 2.

Step One: Calculate weighted coefficient of variance (wCV) for all stratum.

Where, vfh = fraction of total volume in stratum h; CVh = coefficient of variance for stratum h

$$wCV = \sum(vfh \times CVh)$$

$$wCV = \sum(0.73 \times 33) + (0.09 \times 41) + (0.05 \times 1) + (0.09 \times 41) + (0.05 \times 30) = 32.6$$

Step Two: Number of plots for all stratum (nst) $nst = \frac{t^2 \times (wCV)^2}{A^2}$

$$nst = \frac{2^2 \times (32.6)^2}{5^2}, \quad nst = 170 \text{ sample size}$$

Step three: Allocate number of plots per stratum (nh)

$$nh = nst (vfh \times CVh) / wCV,$$

$$nh1 = 170 (0.73 \times 33) / 32.6 = 125 \text{ Journalists}$$

$$nh2 = 170 (0.09 \times 41) / 32.6 = 18 \text{ Electronic media editors (online and broadcast media)}$$

$$nh3 = 170 (0.05 \times 1) / 32.6 = 1 \text{ Print media editor}$$

$$nh4 = 170 (0.09 \times 41) / 32.6 = 18 \text{ Electronic media managers (online and broadcast media)}$$

$$nh5 = 170 (0.05 \times 30) / 32.6 = 8 \text{ Print media managers}$$

For each category, the respondents were selected randomly regardless of their respective media houses until the sample size was completed, i.e. all managers, editors and journalists in Rwanda have had equal chance to be selected.

c) Sample selection using purposive or judgemental sampling technique

Different organisations were purposively selected for qualitative data including public institutions, academic institutions, media development partners, civil society organizations, private sector including banks, one representative was the respondent.

d) Focus discussion groups participants: experts, experienced media stakeholders

Experts, lecturers and media stakeholders interested in media business were invited in three groups. At least four persons and two researchers debated on a well described topic.

2.5 DATA ANALYSIS AND INTERPRETATION

After the data were collected, they were collated and analyzed. Close-ended survey responses were checked for completeness, coded and analyzed using the Statistical Package for the Social Sciences (SPSS) software.

All respondents answering more than just the first section of questions were included in the analysis. Data were analyzed using descriptive statistics where frequency tables were drawn and presented in pie diagrams and bar graphs. Qualitative information was integrated to convey quantitative data.

CHAPTER 3: STUDY FINDINGS

INTRODUCTION

This chapter begins with a general overview of media sector in Rwanda, a simple analysis based on secondary data derived from different publications, reports and websites. This section presents also the key findings of primary data collected from the survey and includes an interpretation of the qualitative and quantitative collected data. The findings have been arranged in themes that address the scope and objectives of the study and in some cases, segregated by respondents' demographic characteristics.

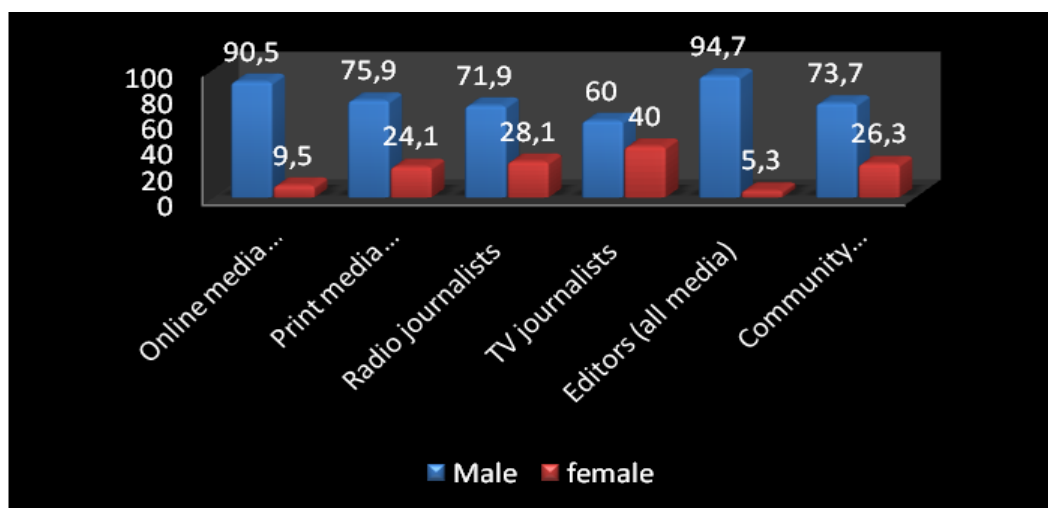
3.1 RESPONDENT PROFILE

In social sciences, research personnel characteristics of respondents have very significant role to play in expressing and giving the responses about the problem. Keeping this in mind, in this study, a set of personal characteristics namely sex, age, education of 26 managers and 144 journalists and chief editors from 56 media organs and 18 independent journalists have been examined and presented in this chapter.

3.1.1 GENDER

Gender is an important variable in a given Rwandan social situation, which is variably affected by any social or economic phenomenon and media sector is not an exception to it. Data related to the respondents' gender is presented in figure 1.

Figure 1: Journalists and chief editors by gender



From figure 1, it is quite clear that out of the total respondents investigated in online media overwhelming majority (90.5%) of them were males, whereas about 9.5 per cent were found to be females. 75.9% men, and 24.1% female journalists in print media, 71.9 men and 28.1%

female journalists in radio stations, 60% men and 40% women journalists on Television, 94.7% editors are men while 5.3% are female. In community radios, 73.7% are men while 26.3% are female.

In Rwandan society, journalism has been considered for along as hard work reserved to males. From the given sample, very few journalists are females and that too, due to various unavoidable and unique conditions and not because of any attitudinal change, per se hence large number of respondents is males by gender in this study.

Figure 2: Media managers by gender

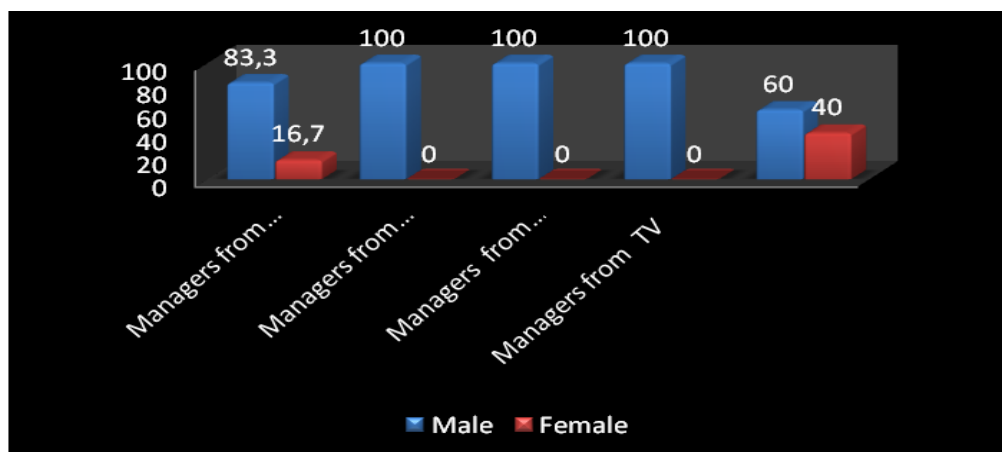


Figure 2 shows that men have a big proportion compared to female manager for media house where they are 83.3% while female are 16.7% of all respondents in online media and 60% of male and 40% of female in community-based media. It has noticed that no female media house manager in print media, radio and Television. Gender equality being required by the National commitment to be respected across all sectors it should also be encouraged in media sector for its development.

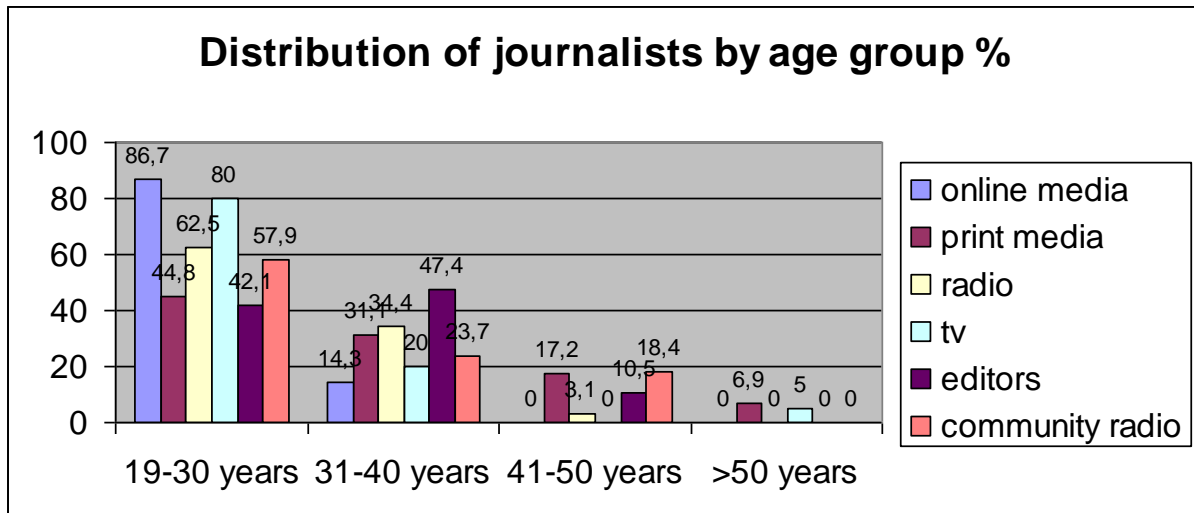
3.1.2 DISTRIBUTION OF RESPONDENTS BY AGE

Age of the respondents is one of the most important characteristics in understanding their views about the particular problems; largely age indicates level of maturity of individuals in that sense age becomes more important to examine the response⁴.

In this study, the researcher asked the respondents their age group in order to know which generation is in each type of media in Rwanda. The figures below present the results from journalists, chief editors and media managers.

⁴ http://shodhganga.inflibnet.ac.in/bitstream/10603/3774/14/14_chapter%204.pdf

Figure 3: Journalists and chief editors proportion by age group



It is evident from the figure 3 that in the age group perspective (19-30 years), online media has a higher proportion of young journalists with 85.7%, followed by Television with 80%, community radios with 57.9%, other radio journalists with 48% and 44% print media journalists. The results indicate also that the editors, which are in this group age, have a proportion of 42.1%. The age group 31-40 years is predominated by editors at percentage of 47.4% followed by radio journalists at 34.4%, print media journalists at 31.1%, TV journalists at 20% and last but not least online media at 14.3%. The age group (41-50 years) has a higher proportion of print media journalists of 17.2% compared to other media categories followed community based radios at 10.5%, 0.3% editors, 0.1% radio journalists, 0% for TV and online journalists. Only print media journalists with a proportion of 2% are in age group above 51years. The general picture provided by this figure is that the younger generation has comparative interest in working in all categories of media compared to other age groups. Older people still have places as editors as it has been noticed in age group of 31-40 years. In addition, no older journalists in online media as it can be seen in age group of 41-51 and above.

Figure 4: Media managers proportion by age group

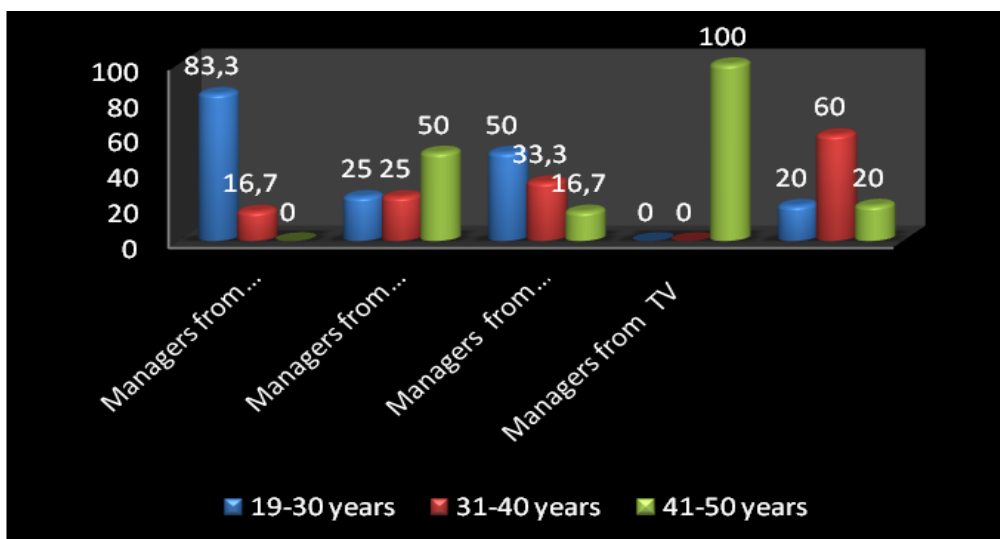


Figure 4 shows that online media managers representing 83.3% are between 19-30 years, 16.7% are between 31-40 years while 0% is the their proportion in group age of 41-50 years. For print media managers, a big proportion representing 50% are between 41-50 years. Among radio managers, a big proportion representing 50% are between 19-30 years; 33.3% are 31-40 years and 16.7% are 41-50 years. One TV manager interviewed was 41-50 years. For community-based radios, 60% of managers are 31-40 years; 20% are 19-30 years; another proportion of 20% is 41-50 years.

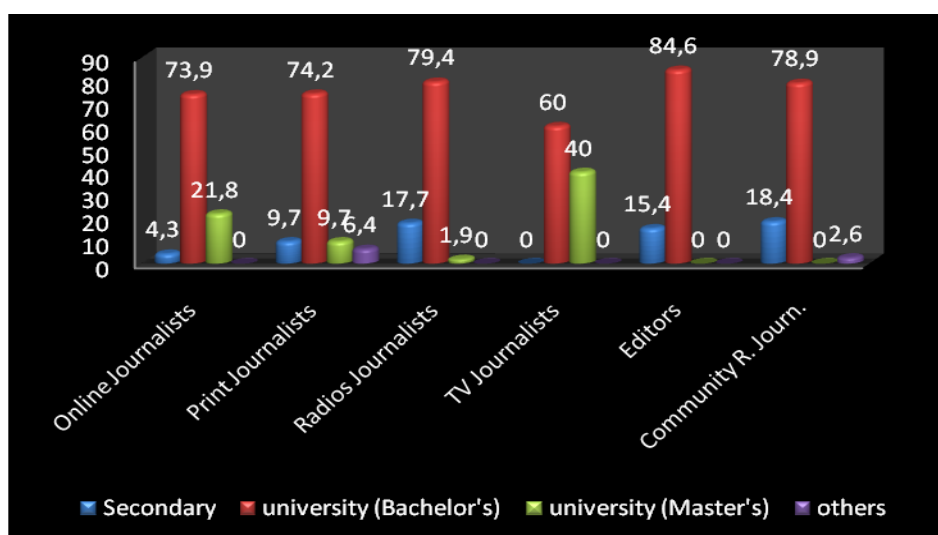
The figure above indicates generally that most of online media managers are younger generation with 19-30 years. Note that this is a group of young people who are mostly interested in new technology. That is why there are no old managers in online media. The managers for print media, radio, TV and community radios have upper ages (31-40 years) and (41-50 years). This leads to conclude that as new technology advances by young people, older people tend to leave jobs in media sector.

To be more specific, large number of respondents is 19-30 years of age in the sample. Some interesting feature of this is that very young respondents are now working in media sector in a big number, which positive for the future.

3.1.3 LEVEL OF EDUCATION

Education is one of the most important characteristics that might affect the person’s attitudes and the way of looking and understanding any particular social phenomena. In a way, the response of an individual is likely to be determined by his educational status and therefore it becomes imperative to know the educational background of the respondents⁵. Hence, the researcher investigated the variable ‘Educational level’ and the data pertaining to education is presented in figure 5.

Figure 5: Level of education of respondent journalists and chief editors



The figure 5 above shows that most of journalists interviewed have bachelor’s degree at a proportion of 73.9% in online media, 74.2% in print media, 79.4% in Radios stations, 60% on TV, 84.6% among editors and 78.9% in community based media. Master’s degree holders are

⁵ http://shodhganga.inflibnet.ac.in/bitstream/10603/3774/14/14_chapter%204.pdf

also available on TV with a proportion of 40%, online media at 21.8% and in print at 9.7%. The secondary school level can also noticed in community radio at rate of 18.4%, in radio stations 17.7%, editors 15.4 percentage, print media 9.7% and online media at 4.3%.

The number of respondents attaining higher education (Master's) was very low. Only television has a big number of respondents that were educated up to the postgraduate's level. It can be concluded from the figure above that largely the respondents completed higher education, which is important today to have a knowledge-based society.

Figure 6: Media managers' level of education

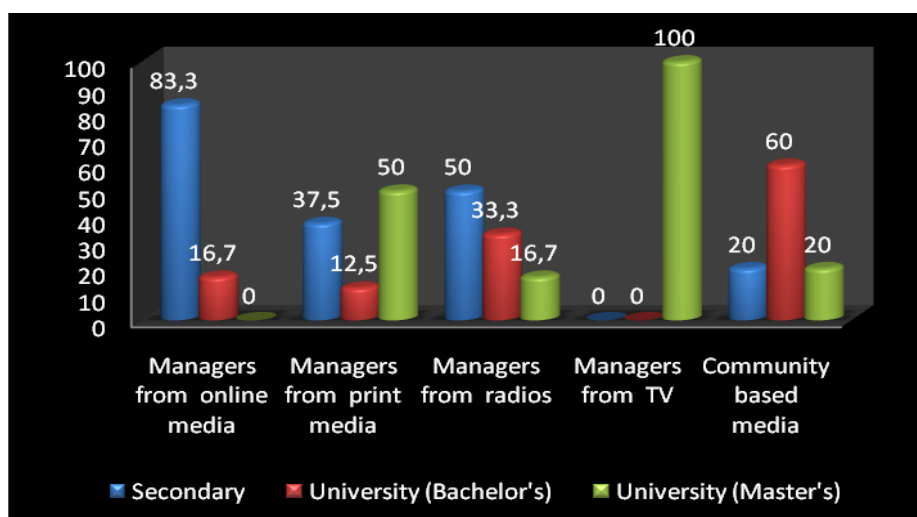


Figure 6 shows that 83.3% of online media managers completed only secondary school, 16.7% have bachelor's degree and among online managers interviewed, none has been educated up to the postgraduate's level. 50% of print media managers interviewed have master's degrees, 37.5% completed only secondary school, and 12.5% have bachelor's degrees. Radio managers representing 50% have completed secondary schools, while 33.3% have bachelor's degree and 16.7% have master's degrees. For television, only one interviewed manager had a master's degree. Among community radios managers, a proportion of 60% completed bachelor's program and 20% have completed secondary school while another proportion of 20% have master's degrees.

From the above figure, it has been noticed that most of online media have completed secondary schools and they are younger generation who tries to create jobs in online media, since it does not require a big start up investment. In addition, new technology is very interesting field for youth.

3.1.4 FIELD OF EDUCATION

Person's field of education has a bearing on his or her personality and so the ways of looking at the problem before him. The quality of life is also determined by an individual's field of education and the incomes he derives from it. Field of education of an individual also socialized him or her in a particular fashion, which in turn reflects his or her pattern of behaviors, and his/her level of understanding of particular phenomenon⁶. In other words, the person's response to a problem is possible determined by the field of education and hence

⁶ http://shodhganga.inflibnet.ac.in/bitstream/10603/3774/14/14_chapter%204.pdf

variable field of education was investigated by the researcher and data pertaining to occupation is presented in figure 7.

Figure 7: Journalists and media managers field of education

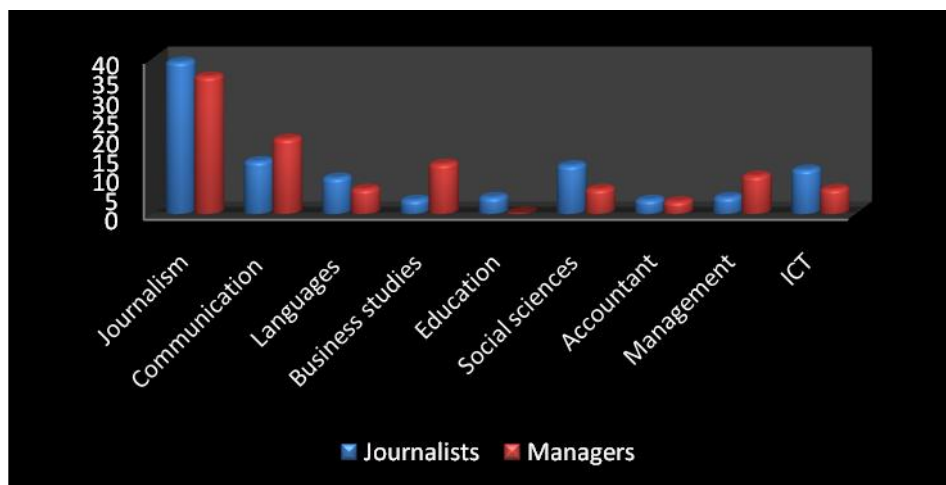


Figure 7 shows that the most journalists and media managers interviewed representing 39.3% and 35.5% respectively have done journalism. While 19.4% of journalists and 13.6% of managers did communication. Other fields are social sciences done by 12.5% of journalists; ICT by 11.4%, languages by 9.3%, management by 4.3%, education by 4.3% business studies and accountant by 3.6%. A proportion of 12.9% of media managers did other field like business studies, management by 9.8%; ICT, languages, social sciences by 6.4% and accountancy by 3.2%.

In Rwanda, there is no limitation to anybody who wants to be a journalist. That is why in media sector, some journalists did other fields than journalism. In order to strengthen this sector, they should be trained on job and get journalism related skills. As it can be noticed from the figure, the proportion of media managers who did business studies or management is equal to 4.3%, which is very small. This indicates that they do not have enough skills in running business. As a solution, they should be helped to get additional skills in business management.

3.2 GENERAL OVERVIEW OF MEDIA SECTOR IN RWANDA

3.2.1 MEDIA LANDSCAPE

According to the current information provided by Media High Council, the country has 50 privately owned newspapers, 31 local radio stations as well as 4 international radio stations relaying to Rwanda in Frequency Modulation (FM), 2 televisions and more than 100 online media outlets. Among radio stations, 10 are operating in provinces other than Kigali and they are commonly called community-based radios. In addition, Seventy percent (70%) of journalists are based in Kigali⁷.

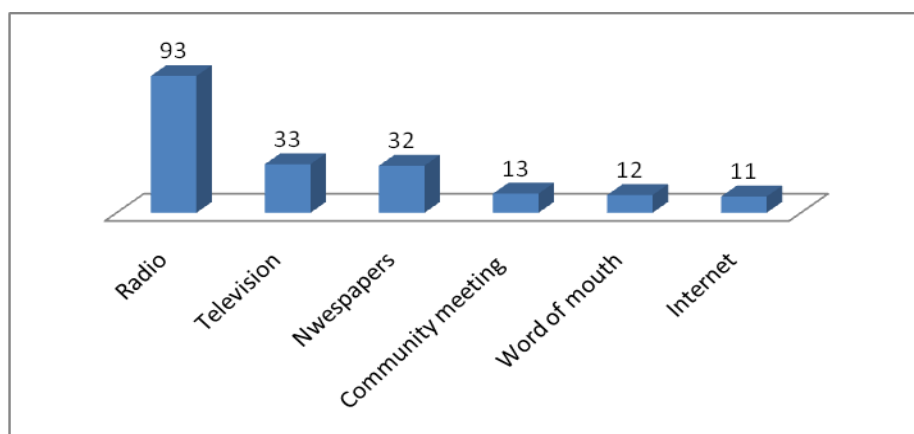
Rwanda's media sector is virgin but with huge potential. Some media have reported high profit margins, others are divesting into more channels only a few years into operation. The good investment climate is due to sustained national economic growth (7.1% GDP), good governance, investor-friendly policies and continued training opportunities (capacity building). The move into digital broadcasting, public broadcaster, privatization of printing press services and vast opportunities in content production and distribution add to the industry's attractiveness⁸.

Based on the RMB findings, the level of media development proves high (68.1%) from the viewpoint of infrastructural capacity sufficient to support independent and pluralist media. Such high level seems to be largely explained by the political will and commitment of the Rwandan political leadership to promote ICT, as a development driver, in all areas of the country's life⁹.

3.2.2 SOURCES OF INFORMATION IN RWANDA

Before deep discussions on some types of media in Rwanda, it is better to look at the perception of citizens on their relevant sources of information. The figure below presents the related information

Figure 8: Sources of information in Rwanda



⁷ https://www.sfcg.org/programmes/rwanda/pdf/Media_Mapping_Report.pdf

⁸ www.mhc.gov.rw/.../National_Dialogue_on_Media_Development_2011

⁹ <http://www.newtimes.co.rw/news/index.php?i=15418&a=13903>

According to the survey conducted by Search for Common Ground (SFCG) in 2010, the most source of information in Rwanda is radio with rate of 93%, followed by television (33%) and newspapers (32%). Community meetings (13%), word of mouth (12%) and Internet (11%)¹⁰. From the mentioned report, views from the respondents show that in all provinces journalists focus their attention on big cities and towns.

Media is one of the pillars which promotes “good life of citizens”. For example, achievements of citizens are published through media, which identify their problems and ask for solutions and citizens have freedom of expression through the media¹¹.

3.2.3 CITIZENS PERCEPTION OF MEDIA CONTENT IN RWANDA

According to the informants, there are a number of challenges with developing and printing or airing quality content. Print media has problems because Rwandans rarely read. People are more interested in ‘horrible stories’ and less interested in politics. One informant said that media people are not objective and do not care about people’s views and only consider the views from officials¹².

The cost of producing radio programs does not allow journalists to go far from Kigali to create programming, so they just cover Kigali City. Community radios are one that can go into villages but they miss enough capacity to realise an important program. Informants said television just talks about meetings and government achievements, but it should also go beyond and visit people in their villages to allow them to get feedbacks and ensure follow-up on what they have covered¹³.

¹⁰ https://www.sfcg.org/programmes/rwanda/pdf/Media_Mapping_Report.pdf

¹¹ https://www.sfcg.org/programmes/rwanda/pdf/Media_Mapping_Report.pdf

¹² *Idem*

¹³ *Idem*

3.3 GENERAL CHALLENGES PRINT FACE IN RWANDA

INTRODUCTION

Rwanda print media is apparently effervescent, but suffering in its business performance. However, it was discovered that only a few titles find their way into reading spaces market stalls, in the city and other towns, in the waiting rooms of hotels, bars, ministries, shops, and travel agencies¹⁴.

Privately-owned media institutions face several challenges. Most of these challenges are limited skills; equipment and financial constraints; lack of an established infrastructure for a countrywide distribution of newspapers. Few produced copies are only available in offices and on the streets of the capital, Kigali. A limited readership has left the Rwandan press weak for impact and self-development. Upcountry, readers deplore a lack of access to newspapers¹⁵. This study was conducted with many objectives, and one of them is to identify all challenges print media faces, and propose strategic actions to bridge the gaps. The following part presents the findings on related challenges.

Figure 9: General challenges print media faces in Rwanda

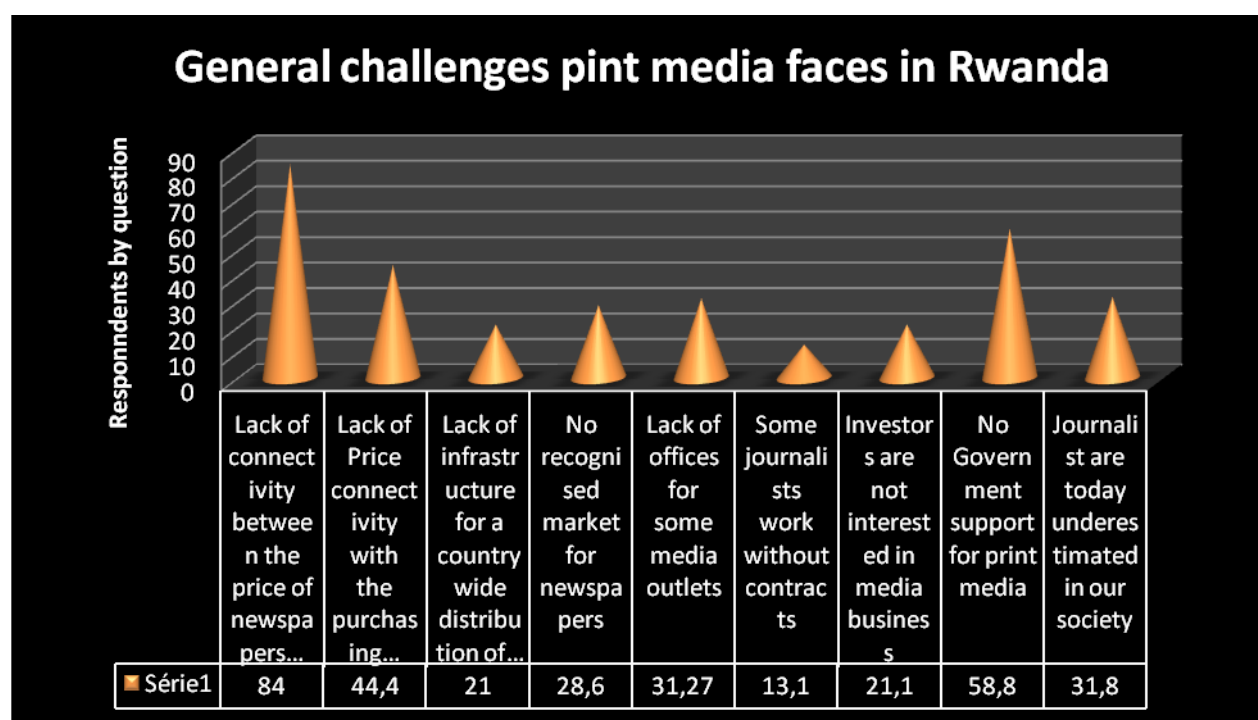


Figure 9 shows that, 84% of the respondents interviewed said that the lack of connectivity between the price of newspapers and cost of production is the key challenge hindering the development of print media in Rwanda. 58.8% said that the government does not support print media; the lacking of connectivity between newspapers price and purchasing power for the customers was confirmed by 44.4 per cent; the underestimation of journalists in the

¹⁴ www.unesco-ci.org/.../improvement-distribution-private-newspapers

¹⁵ *Idem*

Rwandan society by 31.8%; the lack of offices by 31.27% ; the lack of recognized newspapers market by 28.6%; the limited number of investors in media sector by 21.1%; the lack of infrastructure for a countrywide distribution of newspapers by 21%, and 13.1% of the respondents confirmed there is a big number of journalists who work without contracts.

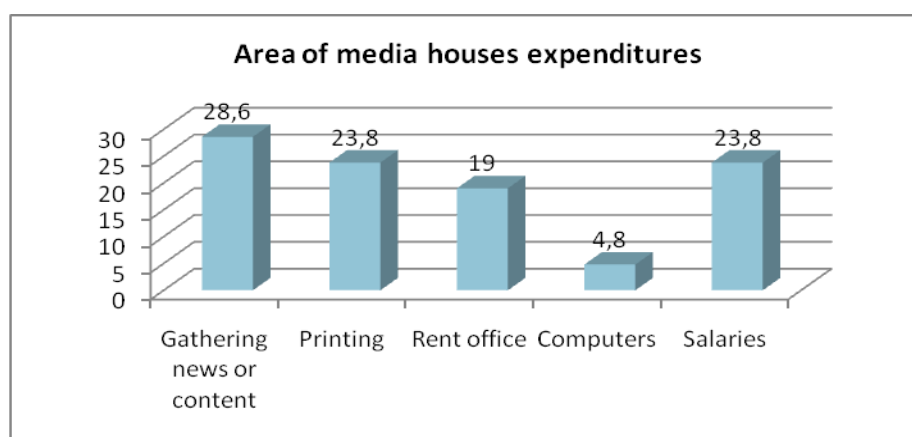
3.3.1 IDENTIFIED CHALLENGES PRINT MEDIA FACE

These views indicate that there is a lack of financial incentives to encourage the growth of print media. The above challenges are presented with more details below:

a) Lack of connectivity between the price of newspapers and cost of production

During the study, participants were asked their views on cost of production for newspapers and its price with a purpose to have a picture on their connectivity, which could bring profitability once it is positive or loss when it is negative. The table below presents the findings related to the cost of production for newspapers:

Figure 10: The cost of newspapers production



From the data analyzed, figure 10 indicates that print media houses spend 28.6% of their budget in gathering news; 23.8% in printing newspapers; 19% in renting office; 4.8% in computers consumables and 23.8% in salaries.

Most of journalists and managers recognize the high cost of the newspapers, especially in printing, renting the office and salaries. Respondents said that printing houses are expensive because there is no paper factory in Rwanda, and the importation taxes of paper is high. That is why many managers send their publication projects to Uganda and import the newspapers ready for distribution.

During the group discussions, participants accused print media managers not to pay well their employees. “They satisfy a small their needs and accumulate debts for many months and apparently without control” they said. Participants confess that media market is difficult to attract and keep good journalists. Journalists actually opt for looking elsewhere for better jobs while managers claim the lack of better journalists.

On the other hand, the selling price never constitutes the income of the media houses, not over 16,90%. Managers employ their journalists not only in news gathering but in marketing operations to obtain some advertising from some big institutions and private sector. The figure below shows the views of respondents on the correspondence between price and cost of production for newspapers.

Figure 11: Connectivity of price and the cost of newspapers production

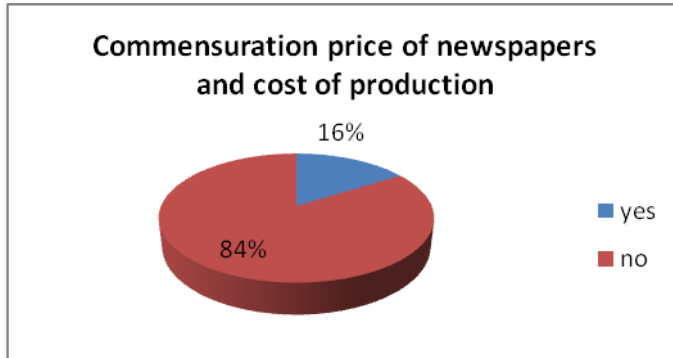


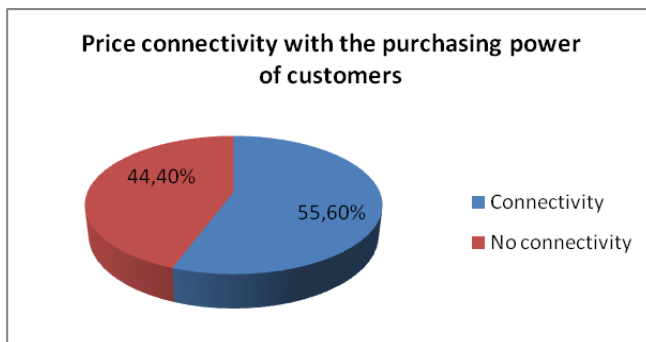
Figure 11 indicates that 84% of respondents said that the price of newspapers is not corresponding to the cost of production, while 16% only do not have such a problem.

The selling of the newspapers should normally be the main source of income for a print media house. During group discussion, some participants argued that it is not the case and claimed adverts from Government institutions which should contribute a lot on their revenue. They added that newspapers sales alone can not sustain a business for a long time. “The general price for a newspaper in Rwanda is 500 Rwf, without advert in every issued copy we cannot survive”, they said. Although the price is lower than expected, they never finish the entire package sent to the market. There is usually a big number of unsold copies, and the outdated ones are sold at Rwf 100 to be used in packaging.

b) The lack of price connectivity between the price of newspapers and customers’ purchasing power

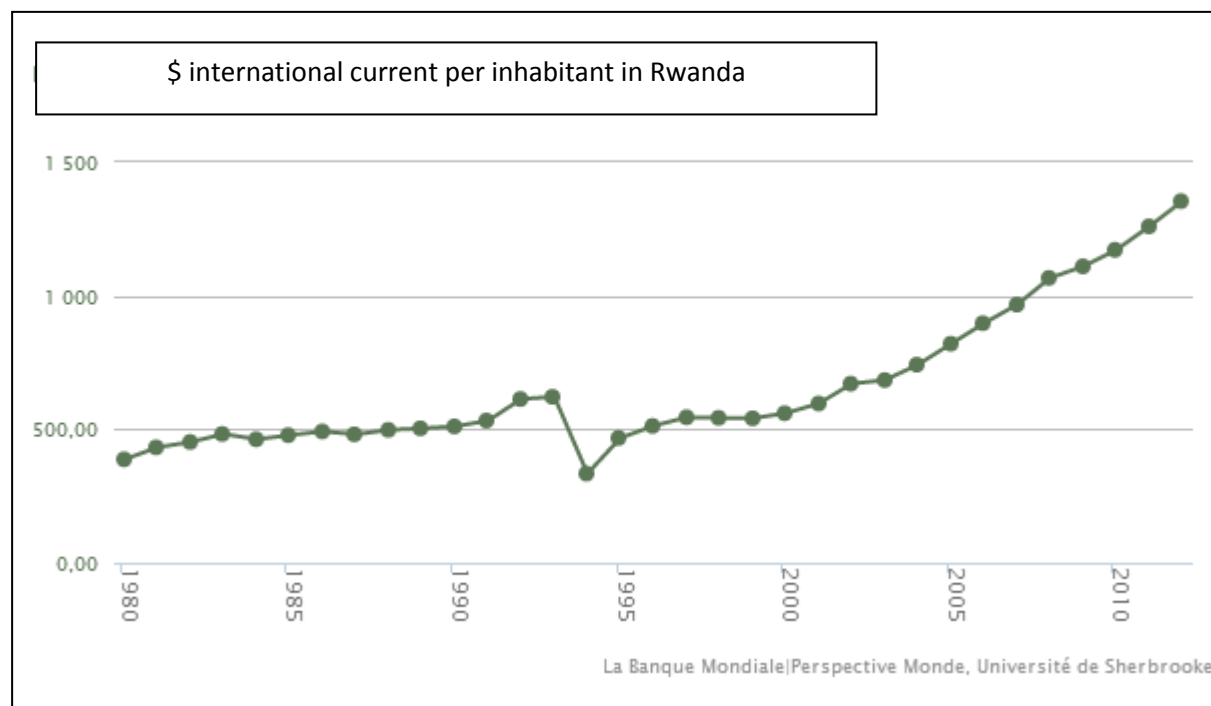
It is not only important to fix the price for any product laying on the cost of production, but also by the purchasing power of customers. In this study, the respondents were asked whether Rwf 500 per a newspaper copy correspond or not to the purchasing power of Rwanda population.

Figure 12: Connectivity of newspaper price and purchasing power of Rwandan population



As it can be seen on figure 12, 44.4% of respondents confirmed that there is no connectivity between the price of a newspaper copy and purchasing power of the Rwanda population, while a big proportion representing 55.60% said the price corresponds to the capacity of Rwandan citizens. But we cannot neglect the small score on this question because all of the respondents are either writers or producers not general population. The price of newspapers at Rwf 500 might be relatively over the customers' purchasing power if calculated basing on the current price of basic products and general national economy growth.

Figure 13: National GDP growth of Rwanda



Depending on the growth rate of the Rwandan economy which increased from \$897.02 of GDP/inhabitant with the threshold of Rfw 249¹⁶ per adult equivalent per day in 2006 to \$ 1,354 in 2012 GDP / Inhabitant¹⁷, we can estimate the purchasing power grew today to Rwf 376. To register the information among the basic needs, the final price should not exceed this threshold.

One print editor confirmed that newspapers are grossly sold to young distributors at Rwf 350, who in return resell them Rwf 500 per copy. This makes an overall margin profit of 42.85% on sold newspapers, which is a very high margin in business. In addition, a newspaper may be expensive considering the prices of everyday domestic needs.

The proposed solution is that the journalists put together contributions to get their own or the favourable printing press, web machines. The state should install a paper factory and promote a newspapers market, etc. In that case, the production cost will reduce and consequently the reduction of newspaper selling price will occur.

¹⁶ Mark Schreiner, 2012, une carte de score de pauvreté au Rwanda

¹⁷ World Bank, University of Sherbrooke

c) Lack of infrastructure for countrywide distribution of newspapers:

During the focus group discussion, the participants were asked their points of view on the newspapers distribution in Rwanda. They said that most of newspapers produced are only available in offices and on the streets of the Kigali mainly. The following figure shows the main causes of barriers hindering the distribution of newspapers.

Figure 14: Challenges associated with newspapers distribution

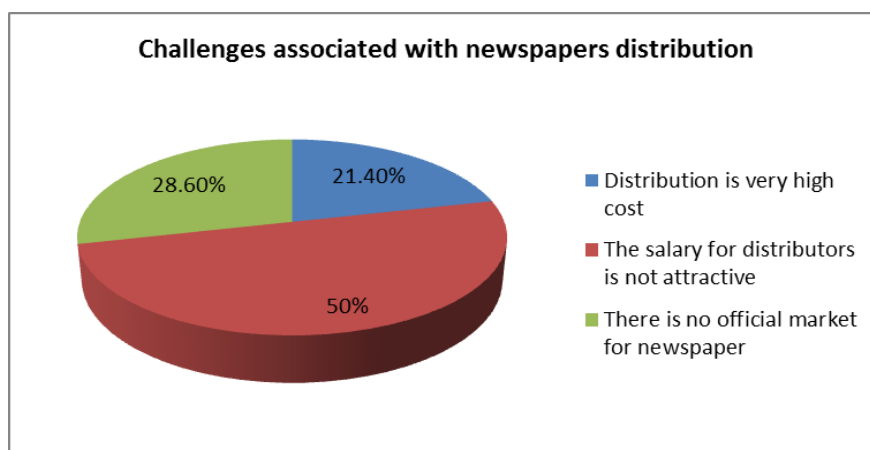


Figure 14 indicates that lack of a distribution plan which integrates distributors in the media supply chain is a serious problem in Rwandan print media. This was confirmed by 50% of the respondents. A proportion of 21.4% identified another challenge, which is the high cost of distribution while 28.60% said that there is a big problem of non-recognised market for newspapers.

According to a recent survey by the Rwanda Institute of Statistics, prospective upcountry readers deplore a lack of access to newspapers.¹⁸ In line of this challenge, UNESCO in 2006 supported a project aimed to establish a distribution network for all private print media with an outreach to all major trading centres in the country. The improvement of distribution enabled the private printed press to gain a wider readership. The Rwanda News Agency was selected organ to implement this project by establishing a distribution network of all private local newspapers. However, not all private newspapers turned up as expected due to their limited production capacities hindering the distribution to all parts of the country and this project did not sustain for a long time.

For example : as the concentration of newspapers is high in Kigali City, even Imvaho Nshya, the most widely circulated newspaper in Rwanda covers only 40% of the country whereas it is a potential powerful public newspaper;

The Media High Council and all media stakeholders are advised to develop another newspapers distribution project with reference to new marketing strategies, as it should contribute to the development of print media in Rwanda. The researcher proposes to lay the distribution of newspapers to the administrative and transportation map of the country, instead of the trading centers. A special study of the customers' behaviors should confirm at which

¹⁸ www.unesco-ci.org/.../improvement-distribution-private-newspapers

place and how the newspapers must be sold and to whom the direct marketing should be conducted.

d) Lack of recognised market for newspapers

The lack of recognised market for newspapers leads to the lack of perfect distribution and vice versa. The newspaper sellers are not distributors, but independent businesspersons who retail newspapers. They are from the informal sector, not registered as business operators and they work in a disorganised manner, which can result in circulation conflicts.

In order to explore the market for newspapers as it is for now, the researcher visited different places including Government institutions' offices, NGOs, private organs and different places in the City of Kigali. The following samples have been identified in Rwanda Agriculture Board, Ministry of Agriculture, Ministry of Youth and ICT, Ministry of Administration and Local Government, Ministry of infrastructure, Ministry of Education, National Commission for Children, Inades Formation Rwanda, National Commission of Unity and Reconciliation, Alpha Palace Hotel, Greenwich Hotel, LemigoHotel, Umubano Hotel and Top Tower Hotel.

Figure 15: Newspapers distribution in institutions

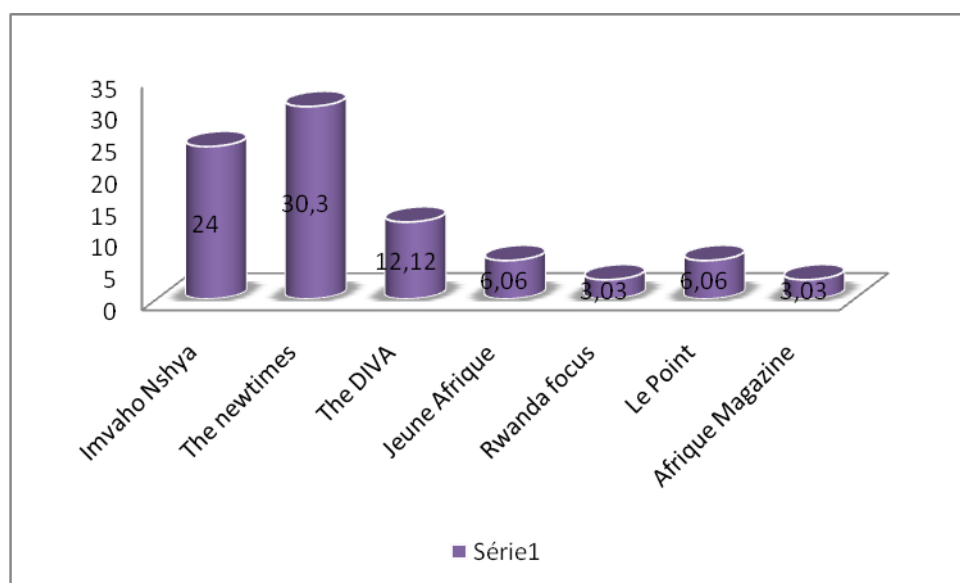
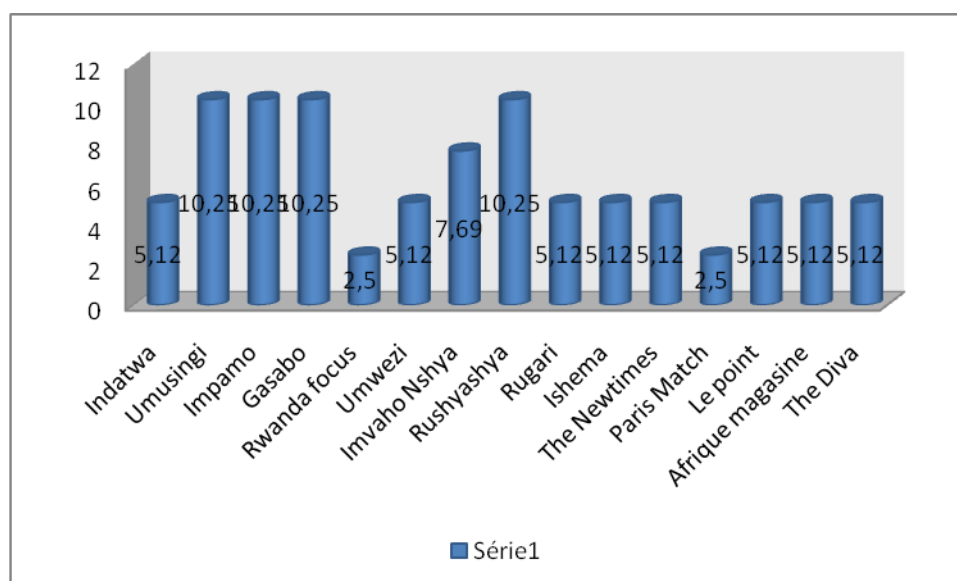


Figure 15 shows that The New Times is the most distributed newspaper in institutions at 30.3%, followed by Imvaho Nshya at 24%, the DIVA at 12.12%, Jeune Afrique and Le Point at 6.06%, Rwanda Focus and Afrique Magazine at 3.03%.

It has been noticed that some institutions do not reserve newspapers for visitors or workers which means they do not encourage reading culture. In order to identify where private print media outlets sell their newspapers, the researcher visited common places in City Kigali, and the figure below shows the results.

Figure 16: Newspapers distribution through selling points in Kigali



The figure above shows that the most sold newspapers in Kigali selling points are Umusingi, Impamo, Gasabo and Rushyashya with a rate of 10.25% for each, followed by Imvaho Nshya with 7.69%, and another group with 5.12% including Indatwa, Umwezi, Rugali, Ishema, The NewTimes, Le Point, Afrique Magazine and The Diva. The Rwanda Focus and Paris Match are sold at 2.5 per cent.

Sixteen (16) titles only were available on the first media market in Kigali, that is Nyabugogo, Remera and Rubangura Building. It was particularly evident that the private print media are not distributed in government institutions. The reason associated with this issue is that the public institutions do not invest in private media.

Looking at the content quality of the most of the private newspapers, while a billion topics abound in political, scientific, technological, cultural, educational, etc., the main subject developed is what is called “BYACITSE” (“hot news” about war, blood, fire, political antagonism...).

The researcher sought to know the experience of journalists and editors and found out that 80% of journalists have less than 10 years experience, and they are generally young (44% are between the range of 20 and 30 years old) and only 53% have followed journalism or communication studies.

During group discussion, the journalists agreed that they prefer hot news (Byacitse). It reaches customer preference. “When the issued number contains stories about agriculture, farming, mining, infrastructure, health, development, national economy, etc, the number of customers tend to reduce” they said. They added that the number increases significantly when issued number contains stories about love, sex, very important persons in conflict with Government, war, opinion from opposition parties, etc. “In front of such a situation, we choose the option which can help us survive” they said. Finally, they said that those who claim better content do not even use to buy newspapers.

During the brief survey done by the researcher through one street of Kigali, one passenger was asked if he sometimes need to buy a newspaper from the current distributors. He said, “We do not even see what they have in the arm, we do not even have the time to fix a look at one newspaper, because they are walking around.” Moreover, these young men neglect people walking like them, as if we were so poor that we could not pay for a newspaper. They pass

and pick a wealthy business man rolling in a big car whereas he has no interest in reading because he is busy”.

Briefly, journalists should be helped to have additional skills to tell and explain stories that capture the attention of most of population; managers to apply a focused distribution plan, and the newspapers’ sellers must stop running away, take a permanent selling point considering a marketing strategy.

e) Underestimation of print media journalists in the society

According to the SFCG Media Mapping report of April 2010, media are not valued. Journalists are underestimated and are paid low salaries. Some people think they are incapable of doing the right things. People in villages do value media and journalists because they think they are important. Officials do not consider journalists because sometimes they take advantage of them¹⁹.

When asked about the issue of underestimation, respondents divided this issue into two different categories including the way journalists generate their income and how they are considered in Rwandan society. The following figure shows the source of revenue for print media journalist.

Figure 17: Main source of income for Journalists

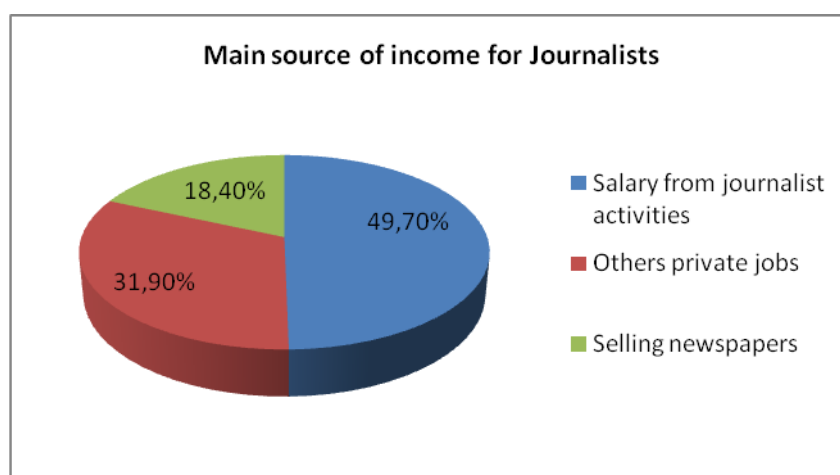


Figure 17 shows that respondents get 49.70% of income from their job as journalists, 31.9% from other self-created jobs and 18.40% from selling newspapers. Most respondents including 56% from print media journalists said that they earn under 100.000Rwf. In order to survive, they are obliged to do multiple jobs. A proportion of 31,9% of interviewed Journalists, said that they do not win living from this profession. They do not even have contracts, which should help them to address a business project to the bank for a loan. This results in poor quality of their work and lack of quality content.

The study revealed that some journalists evaluate the price of the publication of information and chose to censor a bad information or publish it in good light if the subject pays cash. News is treated as merchandise to be purchased by the highest bidder. This is of course

¹⁹ Media Mapping report final, April 2010- SFCG

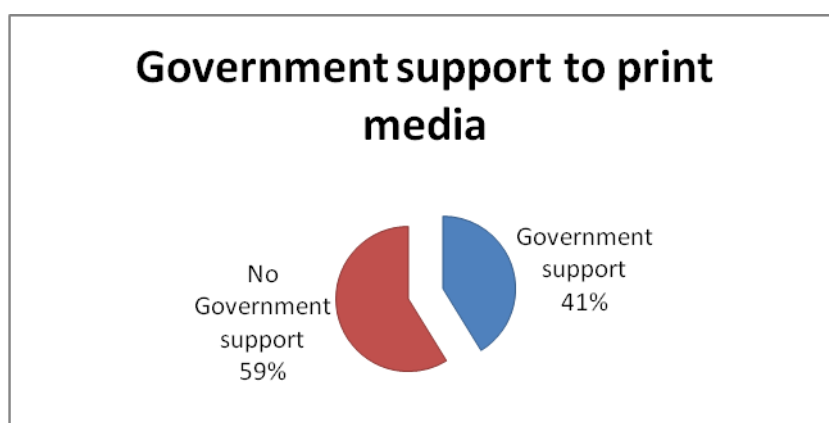
unprofessional and affects negatively the integrity and performance of the media house in question.

Briefly, an unknown journalist argued that it is due to miserable life that some can behave that way. Unfortunately, people tend to lose confidence in media which loose ipso facto positive consideration in the society. The researcher recommends to MHC and RMC to conduct a prevention campaign against corruption in media sector.

f) Government support to private print media

This issue was raised in order to know what respondents are thinking about government support towards media sector. The following figure presents the results.

Figure 18: Government support to private print media



From the figure 18, 41% of the respondents said that the government is supporting their print media, while 59% confirmed that they are not getting any support from the government.

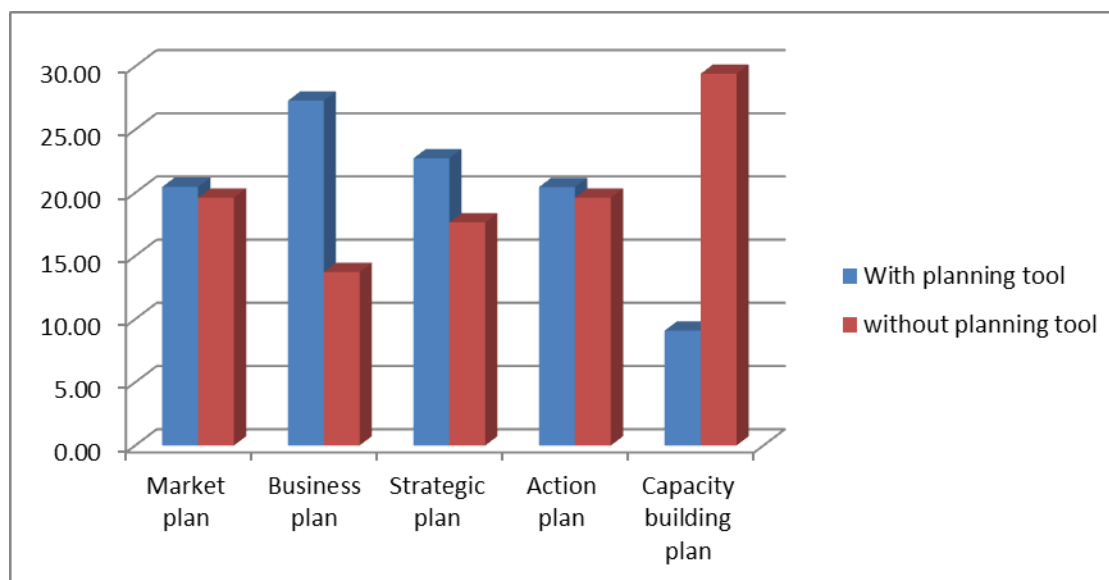
The debate about government support to print media house is sharply engaged especially on the subject of the financial support needed. According to the findings, the way to finance private media is to authorise public institutions to advertise through private media as they do through public media. However, the government representatives insure that there is no official interdiction of non-advertising in private print media. This challenge may be turned into a self-confidence of private media and a push marketing strategic plan towards the government institutions in search of adverts.

The government support to media rises now only about the capacity building financing not in the media operating. It is time to understand the importance of capacity building in business management as it is helpful for media managers to battle independently for their economic autonomy. The project of transferring ownership of property or businesses from a government to a privately owned entity in Rwanda is a good example to private sector that no financial support should be waited for from the government.

g) Lack of Media business research and planning

The aim of investigating whether media houses use to conduct the business research and plan for their markets was to identify the additional planning skills that are required. Through a small checklist survey, only Imvaho Nshya declared that they have done a business study and a development plan.

Figure 19: Managing plan tools



All of the plans presented on the table above are highly needed to convince an investor and to improve the business. Even if most of the media managers (26%) say they have a business plan, most of them said they did not have a capacity building plan (28%). This is very important because it leads the media performance. The strategic planning was cited as a very big challenge among many others, and the solution is to learn to managers and journalists what and how to plan.

One media organ has confirmed that a well-planned marketing shows results when followed. Umwezi Newspaper is one of private print media, which gets some advertising from big institutions, even public ones. It uses a direct marketing way of distribution and sells several copies (but unidentifiable number) which brings about 60% of its general income. Nevertheless, it employs several workers but no one of them has a long period contract and they are not regularly paid, said one its journalists.

h. Low readership culture

Rwandans do not like to read. Even educated people have little interest in reading newspapers.²⁰

The desk research revealed that only 14.2 percent of Rwandans manage to read a newspaper at least once a week and only 22.9 percent among them purchase their own newspapers, while the rest borrow from friends, work or read over the internet. “Rwanda is a verbal communication society that loves to listen more than to read. Over 89% of the households listen to radios but do not read newspapers²¹.

²⁰ Media Policy in Rwanda, September 2004

²¹ <http://www.newtimes.co.rw/news/index.php?i=14163&a=25616>

The consequence of low readership culture of newspapers is that they are not sold and journalists, who usually have limited resources, cannot keep running their newspapers for a long time.

In addition to the challenges detailed above, the following were identified during focus group discussions:

- Most of newspapers are printed in Uganda. This affects time delivery of newspapers to the Rwandan market;
- The financial capacity of most print media outlet is still very low;
- The newspapers content is not attractive to the readers, that is why they are not interested in buying;
- Low financial capacity of consumers leads to poor readership level of newspapers;
- High cost of printing materials (papers, consumables, ..) increases the production cost of newspaper in Rwanda;
- Lack of skills and means, newspapers are still being printed in old fashion format;
- Online media are getting comparatively more consumers than newspapers following the advancement of new technologies;
- Lack of professional journalists to provide consistent news stories is a big challenge;
- The salary is not attractive for workers and the number of workers is limited. Many of private newspapers are composed of 2 or 3 employees;
- Bad management of the newspapers (most print media have no clear organisational chart);
- Self-censorship and censorship by the government leads to fear of publishing critical content;
- Newspapers are still being distributed only in the City of Kigali while rural people do not have access to them;
- Journalists lack adequate professional training;
- There is limited investment in the media industry;
- Capacity-building support is needed for practicing journalists on issues-based reporting and critical analysis;
- There is a lack of equipment available to carry out the work;
- There are not many schools and those who have studied journalism do not want to work for media because low salary;
- Generally the shortage of resources and support to journalists and the lack of credibility were mentioned as challenges by most participants;
- The number of copies usually issued to the market is insignificant for some print media.

3.3.2 STRATEGIES TO ADDRESS CHALLENGES PRINT MEDIA FACE

During the research, respondents have proposed several solutions to address the identified challenges faced by print media detailed above. In addition, the researcher put his hand in suggesting related strategies basing on the analysis of the quantitative data, qualitative data and findings from desk research. The following are combined strategies and suggestions:

a) Readership culture should be improved

As the research findings show that Rwandans do not like to read where only 14.2 percent read a newspaper at least once a week, media should endeavour to build and gradually grow their

own readers. It has been observed that interesting young readers with media content gradually builds a reading culture and therefore, a good customer base for targeted advertisements. The idea is to cultivate loyalty and grow young readership for them to later appreciate why they should consume the media products and even advertise. Examples include introductions of readers' clubs in schools and community neighbourhoods, youth pages/sections or programs targeting the input of the youth, introducing media competitions for the youth, etc.

b) Media development loan fund should be set up

For the sustenance of media ventures, a media development loan fund should be set up to support media, may be introduced and managed professionally;

Establishment of a basket fund administered by an independent structure elected by all stakeholders would also support media sustainability. One useful funding model is that of the Media Development Loan Fund, a non-profit NGO established in the 1990s that gives low or no interest loans to independent private media companies in transition and developing countries.

From 1996 until 2009 MDLF provided loans and grants of some 95 million USD to 72 independent media companies in 24 countries. The Fund is not simply a bank with good conditions; it sets out to support quality journalism and transparent and independent media companies.²²

Rwandan government or other interested parties should be approached to explore such an opportunity for funding. A "Stakeholders Fund" where members' contributions are placed, as well as money earned by the Council for management services it provides for special projects may be created. This fund would be intended for long-term sustainability efforts of Media High Council. Media houses have to understand that there might come a day when it will not be possible to get foreign funding for their programmes. We need to start working on long-term sustainability.

d) Professionalism and capacity building should be emphasised

Lack of professionalism is media's biggest weakness²³. On the financial perspective, most of these outlets barely meet their operational costs. So, which way for Rwandan media? There is no doubt that we are living in an information age where access to and dissemination of information will determine how fast countries develop.

For the media to be a conduit of this information, it will be required to take a two-pronged approach, professionalism and profitability. It is more like the chicken-and-egg debate but whatever shape it takes, it should result in more vibrant and responsible media. Media outlets will have to insist on professionalism, they cannot afford to compromise on quality if they are to win the trust of consumers of their information and advertisers. That is how brands are built²⁴.

In that context, there is still a need for increased training and professionalization of the media. Media High Council (MHC) in collaboration with Rwanda Media Commission (RMC), Journalists Association (ARJ) should make a regular report on the level of professionalism,

²² *National Dialogue on Media Development, 15th-16th November 2011*

²³ <http://focus.rw/wp/2013/06/lack-of-professionalism-is-medias-biggest-weakness/>

²⁴ <http://www.newtimes.co.rw/news/index.php?a=73285&i=15585>

ranking media houses, advise them and prepare capacity building program according to their scores. The following journalism professional standards of quality should be observed:

- ✓ Reporting should be fair, objective, and well sourced,
- ✓ Journalists should follow recognized and acceptable ethical standards,
- ✓ Journalists and editors do not practice self-censorship,
- ✓ Journalists cover key events and issues,
- ✓ Pay levels for journalists and other media professionals are sufficiently high to discourage corruption,
- ✓ Advertisement programming does not eclipse news and information programming.
- ✓ Technical facilities and equipment for gathering, producing, and distributing news are modern and efficient,
- ✓ Quality niche reporting and programming exists (investigative, economics/business, local, political).

d) Print media competition with online media should be regulated

With reference to Printing Forecast 2006: The Trend Watch Graphic Arts Perspective on the Challenges and Opportunities for the Printing Industry, the biggest challenge facing the printing industry has become like a "war on print" by those who produce and disseminate content. The advertising and marketing industry enthuses about online and even newer media 24/7 and has even taken to referring to print as an "offline media."²⁵

What the industry needs is not only to fight back and remind people of the effectiveness of print, but also to come to the same conclusion as its most successful customers that print walks hand-in-hand with other media.

e) Business synergy should be created in print media

According to the report of the National Dialogue on Media Development of 2011, Media Synergy is very important where the weak media explores ways of forming one strong media to benefit from economies of scale and improve on quality. Media houses should seize new opportunities offered by ICT, by adopting an ICT culture and venture into online publishing websites by media houses, etc. The possibilities are legion: adverts, content development, outsourcing, special coverage, etc. Currently, Rwanda boasts a growing list of private media. However, the contribution for each in the society is far from being seen. A form of synergy is required, which may involve forming one strong media (to benefit from economies of scale).

f) Proper marketing and distribution strategies

Basing on survey conducted by Rwanda Institute of Statistics (2007), prospective upcountry readers deplore a lack of access to newspapers. In light of the above, a distribution network for all private print media with an outreach not only to all major trading centres but in all sectors in the country should be established. This should improve the distribution and enable the private printed press to gain a wider readership.

²⁵ <http://www.creativepro.com/article/printing-forecast-2006-the-trendwatch-graphic-arts-perspective-on-the-challenges-and-opportunities-for-the-printing-indu>

g) The use of business management tools

A proportion of 54% of newspapers in Rwanda are irregular. The irregularity primarily can be attributed to financial constraints, poor planning and weak managerial capacities on the side of media owners²⁶. This leads to unsustainability as business ventures. Today, the economic pressure does not allow doing business without plans. However, the research findings revealed that 33% of the interviewed media managers agreed that they work without business plan.

Furthermore, the lack of capacity building plan among 78% of the interviewed managers in this research is a crucial gap, since the updating of the technology and the reinforcement of the human resource skills is the only way to keep up with the economic success and professional performance. In that context, there should be emphasis on the utilization of management tools among media managers for media sector development.

h) Labour laws and contracts for journalists

During this study, it has been noted that some private media organizations deliberately refuse to offer contracts to their staff as confirmed by 13.1% of the respondents. Consequently, journalists often miss social services and bank loans since none believes they hold jobs. At best they are given mere appointment letters by the employer, yet experience has shown these are not respected by corporate institutions out there. Often times it leaves journalists in double jeopardy since it is also common their employers do not pay wages on time, or even not pay at all. It also compromises their independence when journalists fear to be fired at will, given the fact there is no binding contract between them and their employer. This calls for a deliberate effort to protect journalists' rights.

i) Investment in media sector should be encouraged

Limited number of investors in media sector was shown as a big challenge to print media by 21.1% of respondents in this research. Given the crucial role of media in national development and nurturing of a nascent democratic culture in any society, more local and foreign investors should be encouraged to venture into the media sector, which overall depicts great potential. Rwanda is now a safe place, actually one of the most secure places on the continent, if not in the entire world, for any business to flourish. Furthermore, during discussion groups, journalists suggested that the state should lease taxes on the media products to develop the sector and to attract more investors.

²⁶ <http://allafrica.com/stories/200807150859.html>

3.4 GENERAL CHALLENGES COMMUNITY-BASED MEDIA FACE

INTRODUCTION

Community-based media is a term, which does not exist in the current Rwandan media law. The main categories of media known today are print, broadcast (radio and television) and internet media. The Media High Council recognizes that there is a category of community media but does not define it clearly. Before identifying challenges of this category, it is better to present an overview on Radio stations in Rwandan context.

Based on the survey conducted by Search for Common Ground in 2010, radio remains Rwanda's most popular media source of information at 93 percent²⁷. Their success in Rwanda links with the fact that the Rwandan society is traditionally oral and the radio becomes a quick amplifier without borders.

Beside the public Radio Rwanda and its branches throughout the country, there are many private stations among which, some are called community radios. Some have more than one frequency with different power, while others are restricted to one frequency. Some confessional radios are called community radios others not and some others called community radios while funded by the government, etc. This brings about confusion on this category of radios, because some community radios are operating under budget of Rwanda Broadcasting Agency and working in the same line as Radio Rwanda and Rwanda Television. Furthermore, some confessional radios behave like commercial radios, running business adverts, announcements, etc.

3.4.1 DEFINITIONS AND CLASSIFICATION OF COMMUNITY RADIO

Following the case presented above, this research reaches on new categorization of radio stations in Rwandan context as follows:

| No. | TYPE | DEFINITION | RADIO STATIONS TYPE |
|-----|--|--|------------------------|
| 1 | National public Radio ²⁸ | Stations that broadcast nationwide, such as National Public Radio rather than broadcast over a single station. E.g Radio Rwanda offers different stations across the country ²⁹ . | Radio Rwanda |
| 2 | National commercial radio | A commercial radio is any radio station that is supported by advertisement and is owned by a commercial entity, for profits. ³⁰ It is not | Flash FM City Radio |

²⁷ https://www.sfcg.org/programmes/rwanda/pdf/Media_Mapping_Report.pdf

²⁸ <http://www.browncollege.edu/Student-Life/Blog/October-2013/5-Different-Types-Of-Radio-Station>

²⁹ *Idem*

³⁰ <http://www.ask.com/question/what-is-the-definition-of-commercial-radio>

| | | | |
|---|---|---|--|
| | | geographically limited. Its coverage depends on its power and its audience is the general population | Contact FM Isango Star K FM Radio one Radio 10 |
| 3 | Regional and Local Radio ³¹ | Broadcast to listeners in smaller areas, from within a community to across counties depending on the transmission signal. These are usually broadcast over AM or FM frequencies ³² . They are branches of the main broadcast media and share programs nationally. | Musanze Radio Rubavu Radio Nyagatare Radio Huye Radio Rusizi Radio |
| 4 | Community radio | <p>According to Wikipedia, the free online encyclopedia, Community radio is a radio service offering a third model of radio broadcasting in addition to commercial and public broadcasting. Community stations serve geographic communities and communities of interest. They broadcast content that is popular and relevant to a local, specific audience but is often overlooked by commercial or mass-media broadcasters. Community radio stations are operated, owned, and influenced by the communities they serve. They are generally nonprofit and provide a mechanism for enabling individuals, groups, and communities to tell their own stories, to share experiences and, in a media-rich world, to become creators and contributors of media.</p> <p>In many parts of the world, community radio acts as a vehicle for the community and voluntary sector, civil society, agencies, NGOs and citizens to work in partnership to further community development aims, in addition to broadcasting³³.</p> | <p><u>a) Technical interest</u></p> <p>Izuba Radio Ishingiro Radio Huguka Radio Isangano radio Radio Salus</p> <p><u>b) Religious interest</u></p> <p>Umucyo Radio Amazing Grace Inkoramutima Radio Maria Rwanda Authentic Radio Voice of Africa Voice of Hope</p> |

³² *Idem*

³³ http://en.wikipedia.org/wiki/Community_radio

3.4.2 BRIEF DESCRIPTION OF COMMUNITY RADIOS IN RWANDA

Radio Izuba

Radio Izuba was launched in July 6, 2004, founded by the Association for Community Development through Communication «l'Association pour le Développement Communautaire par la Communication (ADECCO).» The Association is composed of people from Eastern Province (former Kibungo) and is located in Ngoma district, Eastern Province of Rwanda. The community is composed of people whose main activity is farming. They need to share experiences, both successes and failures to learn from one another in order to improve. In addition to that, the community that Izuba serves needs to be informed on what is going on in the country.³⁴

Radio Ishingiro

It began its live broadcasts on June 6, 2011 and officially launched on July 23, 2011. Ishingiro was founded by the Association pour le développement de Byumba (ADEB). The project is focusing on promoting rural development. Ishingiro Radio has come as an answer to the prayers of the local people since 2008. The Radio can be heard in Muhanga, Nyagatare and Ngoma districts³⁵.

Radio Isangano

A private-owned local radio station Isangano FM located in Rubengera Sector, Karongi District (former Kibuye Prefecture) in the western Province, the station belongs to a group of Karongi residents organized under Isangano Association. It was established on 30th April, 2011. The project to institute the radio was set up with funds from the American Government through the International Research and Exchange Board (IREX) and the Millennium Challenge Cooperation (MCC).³⁶

The radio station's director, Jerome Rwaswa, said that it closes to 1 million listeners within the area and some parts of neighboring Burundi and the Democratic Republic of Congo were presently on board. He said the radio plans are to attract more listeners.

Huguka FM

Huguka radio was founded by a local promoter in partnership with local farmers' associations in Muhanga district, Southern province. They run also a newspaper under the same name of Huguka ('be educated' in Kinyarwanda), play a role in providing training and promoting communication for rural communities, many of them poor with low literacy rates. The monthly newspaper is published in Kinyarwanda (4,500 copies) and distributed throughout Rwanda. Huguka Radio station was launched in 2011, with greater diffusion of best agricultural practices and promote community development with better access for illiterate people³⁷.

³⁴ <http://www.izubaradio.com/?q=page/about-us>

³⁵ <http://www.orinfor.gov.rw/printmedia/topstory.php?id=3474>

³⁶ <http://www.itangazamakuru.com/index.php/2012/05/rwanda-karongi-isangano-community-radio-celebrates-anniversary/>

³⁷ <http://spore.cta.int/en/component/content/article?id=2851:1903>

Radio Salus

Radio Salus was officially inaugurated on 18th November 2005. On the top of its impact on the students of the University of Rwanda and its overall capacity building goal. Another primary objective of the Radio Salus project is to enhance democracy in Rwanda by providing a new outlet for freedom of expression and the free flow of information.

Training of students and professionals at the radio station has become a key determinant in diversifying media programming in Rwanda and in building confidence in private radio as a viable means of mass media.

Radio Salus programmes include education, agriculture, health, HIV/AIDS, Rwandan history, news, conflict management, sports and coffee. Radio Salus sports programme has been rated the top one in the country.³⁸

A part from the category radio stations above, another category mistakenly named community radios was also analyzed but with new [label](#): “Local radios”

Rwanda Broadcasting Agency (RBA) is running 5 local radios as a kind of decentralization. They all benefit from full financial support of the state for their operations. These stations are:

- Rusizi Radio in Western Province, created on 31 May 2004;
- Rubavu Radio in Western Province, created in September 2003;
- Nyagatare Radio in Eastern Province, created in 2009;
- Musanze Radio in Northern Province, created in 2009;
- Huye Radio in Southern Province, created in 2003.

“Local radios are making a big impact by informing the community about government policies and spreading their ideas and best practices throughout the country, and within the leadership circle”, said Steven Kalisa. When the local radios were introduced, the idea was to have a channel where residents can express their views, ideas and opinion as he explained. He added that the population has a chance to get involved in the planning and execution of all developmental programmes. As well, leaders have a chance to reach to residents easily.

3.4.3 CHALLENGES COMMUNITY-BASED RADIOS FACE IN RWANDA

According to Eric Kayihura (2011), community radios are strong instruments to development, they remain poor radios for poor people. The legal definition of a community radio in many countries has included phrases like social benefit and social objectives as part of the definition. In addition to that, they are restricted in their advertising by limiting the power and the number of frequencies, while big advertisers, clients of local business like hotels, political leaders and strong deciders and civil society offices are situated in the capital city. That situation makes community radios entirely reliant on volunteers and grants or extra budget like selling electricity or internet projects. As if that was not enough, ICT like Skype

³⁸ <http://www.salus.nur.ac.rw/>

connection, phone networks, and fiber optic are not as strengthened in rural areas as it is in cities³⁹.

During the study, the additional challenges identified are the following ones :

a) Lack of professional staff

Community Radio stations are lacking professional radio presenters who can create and design educative programs to attract a significant audience and big companies to sponsor radio interesting programmes.

b) The high cost of renting the transmitting antenna from RBA

The main challenge is the prohibition to build their own transmitting antenna, which obliges the community radios to rent from RBA. According to a concerned informant, the rate is fixed at US\$ 2000 a year to access the frequency. Community radios have also to pay the same amount even though they do not have the same financial capacity and they serve the smaller audience than those of other types of radios, namely commercial or public radios.

c) Capacity gaps among community media managers

Based on a survey done on six “community radios” broadcasting from small cities in Rwanda, only one manager has learned management in his academic courses. Others confirmed that they need additional skills in media business management. Community Radios have the challenge of finding a management team that can ensure its sustainability.

During the study, some challenges related to the skills gaps have been identified as follows:

- Respondents from Huguka Radio showed that they have gaps in video and audio editing;
- Lack of enough skills investigating reporting and analytical reporting was challenge identified by the respondents from Rubavu;
- Respondents from Musanze said that they are lacking enough information technology to producing radio programs, etc.

d) Lack of financial capacity and autonomy

Affiliated RBA community radios have big challenge of financial autonomy while other private community Radios do not have sufficient financial resources. There is also a lack of participation of community members. When it comes to human resources, Community Radios use journalists and technicians that are trained but because of low salary they are recruited by commercial radios which pay better salaries. That leads to the lack of competent media professionals capable of guaranteeing the sustainability of those radios. The lack of training for technicians and the capacity to purchase equipment stops community radios to access the advantages of new Information and Communication Technology.

³⁹ Media High Council, (2011). *National Dialogue on Media Development report, Kigali*

e) Specific challenges reported in community radios from Kigali city

During the research, it has been noticed that religious broadcasting from Kigali City have the same problems as community radios from rural areas and some specific ones. The following table indicates the challenges identified from by the views of respondents in the mentioned radios in Kigali.

Religious broadcasting from Kigali City

| <i>Radio station</i> | <i>General challenges</i> | <i>Suggestions</i> |
|-----------------------------|---|---|
| Inkoramutima | The legal status is not specified in the media law | To put in place a specific law |
| | The radio is not business oriented | To initiate community funding |
| | Not allowed to advertise | To apply for government subsidies |
| | Frequency limitation | Equity in frequency distribution |
| | No sufficient funds to pay good journalists | Government support for capacity building to the existing journalists is needed |
| Amazing grace | Taxes are high (frequency) | To reduce taxes (if possible, zero-rate) |
| | Journalists are not well skilled in ICT broadcasting | Need of training in ICT |
| Umucyo Community Radio | Lack of enough skilled journalists. The best ones come and ask for higher salaries that are not available | Training for the existing ones are needed |
| | Members do not have knowledge in radio management | Trainings for members of the management team about the radio management are highly needed |
| | Inadequate Financial resources | Diversify sources of funds |

f) Other community based media

Only two print media organs considered as community-based in our study are KINYAMATEKA and AMANI. This kind of print media must proliferate, because it answers the question of diversification and specialisation of information. Huguka radio has also the print version of its media platform. The creation of many prints or the extension of the main prints in different specialities would enhance the community media sector. For instance, a newspaper NI NYAMPINGA that writes about girls' education and emancipation is a kind of a community print media. The promotion of this type will increase the readership in Rwanda.

3.4.4 STRATEGIES TO ADDRESS CHALLENGES COMMUNITY-BASED RADIOS FACE IN RWANDA

This research has concluded that it was an error to give a common name “Community radios” to outlets affiliated to Rwanda Broadcasting Agency, religious broadcasting and other non-commercial radios located in countryside. Since, the identified challenges they face are different strategies to address them will be different too. The following regards the true community media.

a) Increase innovation in print community-based media

A million of topics exist in the society that can be developed and meet the interest of the people. Existing newspapers should think twice their content management and adapt their marketing plan with new titles, new destination, new prices, new readers. The Maslow’s pyramid of human needs might help to analyse the needs which are not filled in other to develop new print projects. For example, people need to learn about education, pregnancy, children, sport, sun, rain, climate, love, war, cars, etc. Every topic can constitute a specific newspaper to the targeted population.

b) Problem related to legal status of community radios, advertising regulation and government support

There is a need to advocate for community radios in terms of legal status, because the current media law does not make distinction between community radios and other radio categories. Since the community media is non-profit and does not exceed 20% of advertising program, it should have right to a financial support from the government. Because the access to information and the information delivery is a universal right, the national budget must preserve a significant share to media, which is not business-oriented. There should not be distinction between public and private media, when both work for the general population. Also, taxes should be cancelled for the non-profit media outlets.

c) Trainings for all community radios staff are recommended

Trainings for media managers, technicians and other staff should be done locally or abroad. There should be organized study tours in advanced community radios, outside Rwanda, and specific trainings on investigative journalism are needed. Another efficient method to improve journalistic skills is to bring experienced trainers from outside and train them on the job.

d) Transport facilities should be provided for community radios staff

The lack of transport facilities have been identified by most of community radios as a serious problem, which prevents journalists to cover stories to intended audience. The solutions suggested include strong vehicles, which can support them even in bad quality road away in villages.

e) Problem of financial capacity among community radios

As solution to the problem related to income generation and sustainability among community radios the respondents suggest that there should be regular financial support from the State to community radios as they work for community interests.

3.5 MEDIA INDUSTRY CHALLENGES ASSOCIATED WITH ADAPTATION TO THE DIGITAL REVOLUTION

3.5.1 OVERVIEW OF ICT IN RWANDA

The digitalisation revolution is based on the operational Information and Communication Technology infrastructure. ICT is a central engine to driving Rwanda's transformation to a knowledge-based economy, a fact Rwanda has acknowledged by allocating a budget to ICT as a percentage of its GDP that is at par with OECD⁴⁰ countries.

According to Rwanda Development Board (RDB), Rwanda continues to be one of the fastest growing African countries in ICT and there are several avenues for growth for the ICT sector from e-commerce and e-services, mobile technologies, applications development and automation to becoming a regional centre for the training of top quality ICT professionals and research. A robust ICT industry can create wealth, jobs and entrepreneurs⁴¹.

In addition, Rwanda's Internet penetration grew from less than 1% in 2000 to 7% at the end of December 2011. With the existing ICT infrastructure as well as access network rollout program, internet penetration is projected to increase tremendously to over by 2016⁴².

a) National ICT Strategy and Plan NICI – 2015

Adopted in 2000, the Vision 2020 aims to transform Rwanda into a middle-income country and transition her agrarian economy to an information-rich, knowledge-based one by 2020. The Government of Rwanda strongly believes that Information and Communication Technology (ICT) can enable Rwanda leapfrog the key stages of industrialization. As such, Government of Rwanda has integrated ICTs, through the NICI⁴³ process, as a key driver for socio-economic development to fast track Rwanda's economic transformation, and consistently strives to align the country's development agenda to global trends in order to be competitive⁴⁴.

According to RDB, the third plan, NICI III (NICI-2015 Plan), will focus on the development of services by leveraging ICTs to improve service delivery to citizens, as Rwanda approaches the fourth and final phase of the NICI process that will propel Rwanda to achieve Vision 2020 goals.⁴⁵

b) Digitalization as a vehicle of the new age and transformation

In his analysis, Mazars has shown how digitalization, is sweeping across every aspect of our daily lives in all possible ways. "Right from gathering news we find in the newspapers every morning to the billing process at our neighbourhood grocery shop, it is digital technology that is making tasks faster and more accurate" he said⁴⁶.

⁴⁰ Organisation for Economic Co-operation and Development

⁴¹ <http://www.rdb.rw/departments/information-communication-technology.html>

⁴² <http://www.rdb.rw/departments/information-communication-technology/overview.html>

⁴³ National Information Communication Infrastructure (NICI)

⁴⁴ National ICT Strategic plan NICI, 2015

⁴⁵ http://www.rdb.rw/uploads/tx_sbdownloader/NICI_III.pdf

⁴⁶ <http://www.mazars.co.in/Home/Our-expertise/Publications/Digitalisation>

According to Miguel De-Fontenay, the impact of digital technologies is prevalent in every spectrum of our lives and consequently the current era is termed as the “digital age”. Today digitalization can be seen as a tool of transformation which extends beyond our lifestyle to the way we transact, interact and conduct business. Across all sectors, be communication, media, healthcare, retail and manufacturing, we are increasingly seeing the use of digital technology. It is important to understand and appreciate the factors that are ushering in such changes and how these are impacting the modern day business⁴⁷.

c) The digitalization in communication

This is a new technology consisting of a binary signal coding: 1 and 0 systems meaning that a signal is there or not there. The video signal has been emitted, since the television age, in an analogue way using the transmitting antenna beside another analogue transmission of the sound by another antenna. The digitalization will set the video and audio signal in the same bandwidth with similar technical good quality⁴⁸.

During this study, one of the interviewees Mr. Innocent Nkurunziza, the RBA Department Head technician said that the arrival of digital TV is a change as radical as it marked the transition from black to white to colour. It is getting better images, but does not stop there, but also will open the doors to the future introduction of services never imagined, such as mobile TV reception, interactivity, and video on demand services or multimedia so fashionable nowadays with the Internet explosion.⁴⁹

d) Migration from analogue to digital terrestrial television broadcasting (DTTB)

In its assessment report, “Roadmap for the transition from analogue to digital terrestrial television in Angola” ITU⁵⁰ said that this is a media-related project, which is essentially a television broadcasting revolution, but it concerns the whole media sector including telephone. It is also called terrestrial, because the digital system has been already used in satellite transmission before the International Union of Telecommunication authorised all countries to plant the digital retransmission on their lands in order to diversify the TV programs including the international ones currently received only from satellites and parabolic antenna. The aim is to protect the environment by reducing the number of antenna, the waste of electricity power and access to the largest offer of information⁵¹.

According to Mr. Nkurunziza Innocent, the transition from digital TV for the Regulatory Authority will bring better regulatory framework and increase license fees. The impending switch over in the UHF⁵² band from analogue to digital broadcasting across the world presents a unique opportunity for assisting the development of countries⁵³.

⁴⁷ *Idem*

⁴⁸ *Idem*

⁴⁹ NKURUNZIZA Innocent, Technician and Head of Department

⁵⁰ International Union of Telecommunication

⁵¹ www.itu.int/ITU-D/.../digital_broadcasting/.../db_afr_roadmap_Angola.p..

⁵² Ultra-high frequency (UHF) designates the ITU radio frequency range of electromagnetic waves between 300 MHz and 3 GHz (3,000 MHz),

⁵³ Nkurunziza I, *idem*.

e) Digitalization migration process in Rwanda

Key ICT and media-related infrastructure including broadband and fiber optic connectivity has been installed across the country. However, Rwanda's media is yet to adequately exploit the opportunities it presents. It is now a good time to know how to exploit the opportunities and deal with the challenges of new media and advanced technology in ICTs⁵⁴.

The International Union of Telecommunication asked member countries to proceed in switching off analogue television, and switching on digital television between 2012 and 2017. Some countries have succeeded in switching onto digital before 2015. Rwanda has been in process of a simultaneous switching off and on since 2012.

Only digital signals are emitted in many Districts of Rwanda, while others have deadlines. What is special for the terrestrial digital television is that one high capacity transmitter from the highest summit Karisimbi volcano will send the signal to the whole country in one shot. The same transmission will combine international, national, local, community radio and television broadcast programs⁵⁵.

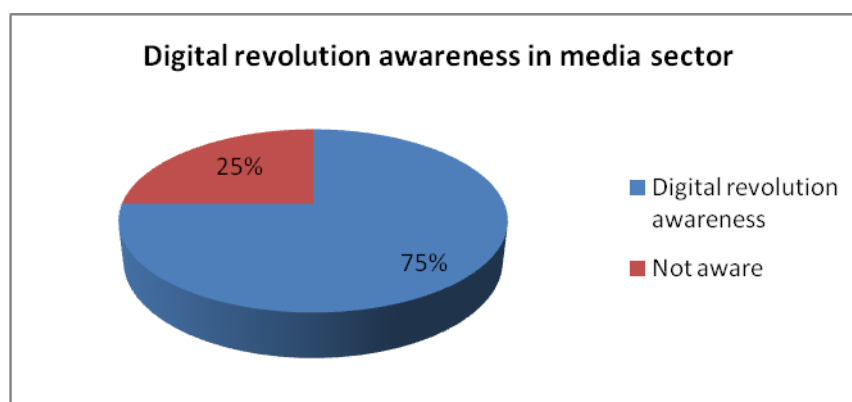
3.5.2 CHALLENGES ASSOCIATED WITH ADAPTATION TO DIGITALIZATION

Participants in this study identified many challenges associated with adaptation to digitalization through questionnaires, group discussions and in depth interviews. Moreover, debates with media and telecommunication technology experts have been done through forum discussions on the digitalization subject. They revealed digitalization challenges and suggested adequate solutions to address them. Below are presented identified challenges:

a) Low awareness of digitalization process in Rwanda

The figure below show the results from respondents on the issue related to their awareness of digitalization in Rwanda.

Figure 20: Awareness of digitalization in Rwanda



⁵⁴ http://www.mhc.gov.rw/fileadmin/templates/PdfDocuments/National_Dialogue/National_Dialogue_2011/Concept_Paper_for_National_Dialogue.pdf

⁵⁵ RURA, (2012). *Strategic plan 2013-2018*

Figure 20 shows that 75 % of the respondents are not aware of what is going on in digital system in Rwanda, only 25% confirmed that they are aware of it.

This is a big challenge of digitalization success in Rwanda since the ones who should explain it to ordinary people as journalists, said that they are not aware. Adequate measures should be adopted to sensitize digitalization to citizens and trainings to journalists and technicians.

b) Limited ICT skills sets⁵⁶ required for sustainable growth

The ICT sector in Rwanda is lacking persons skilled enough. The respondents' views about this challenge have been confirmed by the National ICT Strategy and Plan, where in the framework of the National Information and Communication Infrastructure (NICI) 2010 – 2015, some specific skills development projects have been designed to increase the number of specialized IT-related industry, IT project management and other set of skills required for the sector growth. However, these initiatives are still in early stages and have not yielded limited tangible results. Skills development remains at the heart of a sustainable knowledge-based economy. The Ministry of Youth and ICT considers that it would continue to address that challenge⁵⁷.

c) The absence of a Last Mile Network

Respondents emphasized the fact that “There is no Internet coverage countrywide” and “There is not enough electricity in the country”. The results from desk research have shown that the country has already invested in a robust and resilient communication infrastructure with the construction of the National Backbone, Kigali Metropolitan Network amongst others, but the absence of a Last Mile Network is preventing a steady growth of the Internet penetration countrywide. However, there is a big improvement where percentage of households with internet access shifted from 3.2% in 2010 to 5.0% in 2011⁵⁸.

d) ICT Penetration, ICT awareness and literacy rate at community level remains at a very low level

In general, statistics show that citizens living in rural areas have a limited ownership of ICT devices, be it for smart phones, TVs and computers, which were available to 1.3% of Rwandans in 2010, and 2.0% in 2011. This partially affects broadband uptake in the country. In addition, citizens (especially rural citizens) have a very limited awareness of how ICT can improve their productivity and socio-economic welfare⁵⁹.

In addition, ICT awareness and literacy rate at community level remains poor, see that computer literacy rate (percentage ages 15 and older) was 3.3% by year 2012.

⁵⁶ A person's range of skills or abilities.

⁵⁷ Rwanda ICT Sector Profile-2012

⁵⁸ <http://www.ictworks.org/2013/02/17/the-5-key-ict-sector-challenges-for-rwandan-socio-economic-transformation/>

⁵⁹ <http://www.ictworks.org/2013/02/17/the-5-key-ict-sector-challenges-for-rwandan-socio-economic-transformation/>

e) Higher costs of digital material and adaptations

According to the Economic Development and Poverty Reduction Strategy (EDPRS II), about 45% of Rwanda's population is considered poor. This means that close to 5 million Rwandans live on less than a dollar a day. However, the price of the new digital receiver or the set top box for decoding the analogue to digital is equivalent to US\$40⁶⁰. This is obvious that the price is not in connexion with most of Rwandan purchasing power.

3.5.3 RECOMMENDATIONS FOR MEDIA SECTOR ADAPTATION TO DIGITALIZATION

a) General recommendations

All of the following suggestions from the respondents are important and media stakeholders should consider them while planning for media sector:

1. A strong campaign to sensitise audiences of the need to invest in digital migration would be backed up by the benefits provided by DTV: better sound and pictures, high definition TV, more channels, quality content, higher interactivity with audiences, etc. Successful migration will be preceded by an analysis of the rewards and risks associated with the new technology: consumer costs (for Set Top Boxes, owning a TV, power connectivity, etc), costs of sourcing rich local content to ward off competition from other stations, training technical staff, etc;
2. With the advent of digital broadcasting, the government should subsidise the digital migration infrastructure such as STBs, to offer subsidies on newsprint, to ensure that the technology reaches as many citizens as possible;
3. It is recommended that the migration should be done in gradual steps (not one big leap) considering the means of the audiences. Investing in digital migration should be a gradual marketing effort that considers the costs per viewer. The government should take a gradual approach to increasing the number of channels as the economy grows and more TV households increase;
4. Media should embrace new technologies that enable interactivity with each of the identified audiences. All media houses should join on to the bandwagon of new media (internet, social media, etc) to specifically target diversified interests of the audiences with rich local content;
5. The national goal and policy should drive the technological choices. Consumers must invest if they wish to migrate. The question is: what do they get for their investment? Secondly, is this an affordable investment? In other words, how many people can own TV, buy a set top box, new antenna (in some cases) and pay regularly for electricity;
6. Journalists, chief editors and media houses owners should be familiar with digital systems for better media services. In this context there is a need of trainings, study tours, short courses, etc. in field of digital system;

⁶⁰ <http://www.humanipo.com/news/34893/opinion-set-top-box-price-to-determine-digital-broadcasting-market-share/>

7. During the research, it has been noticed that media managers have fear that the cost for renting the transmitting antenna from RBA and License fees will be increased with digitalization. That fear result the fact that all radios will extend their coverage overall national territory through the same bandwidth and the same transmitter of the DTR/DTT (digital terrestrial radio/television). Coverage will no longer be a challenge. However, the negative consequence is the increase of charges that should occur. It is recommended to all media stakeholders to act as soon as possible so that the stated fees should be affordable to all media houses and if possible, subsidies should be provided for them.

b) Print media adaptation to digitalization

Press review should have the place in radio and television programming. The newspaper must be the main source of radio and TV programmes. The number of print reporters must be most important than the number of broadcasting and online journalists. The distribution of newspaper's journalists on the national area should follow the administrative map until the sector level. Newspapers should have the hard copy and the online version, their website and compete to put as much as possible information in order to sell the accurate and reliable content to the international media organs.

c) Radio adaptation to digitalization

All radio stations should optimise their production in a way they can be broadcasted on internet as well as on the Digital TV. The nationalisation of the digital signal is an opportunity to widen the coverage of existing radio broadcasting agencies where all radios even community ones will be listened to throughout the country.

d) Television adaptation to digitalization

The quality of programs and presentation should be the first emphasis of TVs in Rwanda. Professionalism should be a motto of everyday life of journalists. The Rwandan TV will be no more be watched by a small number of public but by many terminal users. They must capture no difference of quality when zapping from an international to local channels.

e) Online media adaptation to digitalization

1. Online media must include among their proposals a window to present videos and radio in streaming or in podcast, or to present a complete TV online. That online TV would be the first step to become a complete digital TV online if they are financially able to create and raise it as a main online activity.
2. With new media, journalists will need to quickly adjust to new story forms for segmented consumers. New media development will require thorough upgrade in journalistic skills in content development, research and new IT solutions design (multimedia/online journalism).
3. There is need to train the next generation of 'digital journalists' to prepare for the new media revolution. To harness the potential of ICT for media development, there is a need to build a critical mass of engineers and technicians with hand-on skills and competencies in the whole multimedia value chain. There is need for more demand-

driven courses such as specialities in journalism reporting health, environment, ICTs, business/economy, etc delivered through workshops, conferences, etc.

3.6 PRINT AND BROADCAST MEDIA BUSINESS MANAGEMENT

3.6.1 SWOT ANALYSIS OF THE SUPPLY CHAIN OF PRINT MEDIA PRODUCTS

Introduction

According to the updated data from the Media High Council, 39 print media outlets are operating as business entities in Rwanda. Managers of these media outlets are targeting day-to-day profits from various readers, but they are still facing limited capacity in terms of knowledge, potential human resources, capital resources, finances and specifically marketing strategies.

During the fifth Annual National Dialog on Media Development held in Kigali on December 11-12 2013, Charles Onyango-Obbo⁶¹ emphasized the need for the local media to build their image. “It’s important to understand that you do not sell the circulation of a newspaper. You sell the brand” he said, advising local media to focus on defining what they stand for and keep their presence on the market. There is a need to keep identifying the needs of their diverse audiences ‘in order to stay relevant’. “Let’s keep improving content because “what’s good will sell itself,” said veteran Radio Rwanda journalist and editor with Rwanda TV, Cleophas Barore. Let us display where print media gaps and challenges are observed as weaknesses and threats, but also strengths and opportunities are there.

Strengths

- The media are good to educate and entertain people;
- If the media become more competitive, they will become more interesting and profitable;
- The digitalization is revolutionizing the media sector. It is a good thing to adapt to the new technology;
- Thanks to media training schools, the number of journalists increased since after genocide up to 2014.

Weaknesses

- The digitalization faces the problem of lack of enough researches done in this domain;
- It is evident that the level of newspapers circulation is very low, despite the number of newspapers found in Rwanda;

⁶¹ Charles Obbo is the Nation Media Group’s executive editor for Africa and digital media

- They seem to be like many players on a very small playground, because among 40 newspapers, not more than 5 are visible;
- There is poor reading culture even among intellectuals from different academic institutions, and lack of professionalism in media sector;
- Print media sector is facing seriously low level of professionalism and marketing strategies. In addition, most of private print media contents and products are based in Kigali city;
- A good number of newspapers are not attractive to many advertisers to make profits;
- 40% of media business managers and their administrative and professional staff proved to be poorly estimated on the level of business management. In that case, the trainings need to be more emphasized on this segment of staff;
- 90% of media staff confirmed to not have adequate skills in Information Technology;
- 68% of print media managers do not have funds or budget plans for their personnel trainings;
- 95% of print media outlets are not financially viable, which is the main cause of poor salary scales and lack of contracts;
- The print media content is still an issue for consumers' needs;
- Newspapers are still printed in old fashion format due to lack of skills;
- Lack of professional journalists to provide consistent news stories;
- Salary is not attractive to workers. Many of private newspapers are composed of at least 2 or 3 employees;
- No organisational chart and business plans of the newspapers;
- Self-censorship and censorship by the government.

Opportunities

- BRD and bank managers are willing to be partners in digital revolution movement to allow information being clean and faster at cheaper prices;
- Bank of Kigali works closely with media houses through all of the banking aspects. They receive journalists and all of the media stakeholders and analyze all of their projects with no specific reference to media. If their project is viable, the bank will fund it;
- The impact of loans from banks to media sector will depend on how they make use of it. If a project is viable, they will improve the media sector such as providing employment and improving the quality of news;
- There is an opportunity of merging some small prints media outlets in one or two organs to be able to convince the market;
- RDB can contribute in training programs oriented to improve contents. The citizens need to be educated more than informed or choked. When the media sector will demonstrate and defend the good business plan, RDB is willing to invite as many investors as possible and motivate them. Thus, it is not RDB's concern to develop a sector but the

sector itself contributes to its development. If the state can lease taxes on the media products as it is on computers today, of course this can enhance the sector⁶²;

- MTN Rwanda is working closely with media houses by giving them chance to advertise its products;
- Airtel and many other media investors are ready to share the same selling point with newspapers if there is one;

Threats

- The digital revolution becomes a real threat the print media segment face, where a good number of readers are leaving print media content for the sake of online mainstreamed media content;
- Poor access to internet connectivity, while it is one of the main source of information and the empowering devices to working software design;
- The use of the hand copy newspapers becomes a danger to environment protection; If a paper factory is installed in Rwanda, it should proceed by recycling newspapers.
- Lack of trainers or few of them skilled in the field of digital migration and media business management;
- Some authorities and public understand journalists as their enemies. It is important to help change their mindsets vis-à-vis media as stakeholders.

3.6.2 IDENTIFIED SUCCESS FACTORS AND RISK FACTORS TOWARDS PRINT MEDIA GROWTH

Introduction

“Risks are usually defined by adverse impact on profitability of several distinct sources of uncertainty, while the types and degree of risks an organization may be exposed to depend upon a number of factors such as its size, complexity business activities, volume etc” (SBP, 2003, p.1).

As the following point, the definition of Critical Success Factors (CSFs) are introduced by Rochart (1979, p.84). He defines Critical Success Factors as “The limited number of areas in which results, if they are satisfactory, will ensure successful competitive performance for the organization”.

⁶² According to KANYANGE Brigitte, RDB Marketing Senior Officer

Success Factors

The key factor of success for the print media will be the strategy of distribution. To determine new consumers of newspapers goes hand in hand with new content management to meet the interest of the population. A huge of consumers is waiting for a good offer: the half of the national population has been to school and is concerned by what happen around their locality or the world. 5 millions of people !

Risk Factors

The print media might deeply fail if it goes on creating redundant newspapers, without innovation, without new marketing strategy. If the government does not support the project of improving the readership culture, print media would fail to develop.

3.6.3 SWOT ANALYSIS OF THE SUPPLY CHAIN OF BROADCAST MEDIA PRODUCTS

Introduction

As shown by this study, the field of media entrepreneurship is now gaining momentum with many institutions of higher learning, offering it as a subject of study—certificate and degree levels. In today's changing media environment, entrepreneurial opportunities abound as barriers to entry for new technologies and platforms fall. New venture opportunities span a wide spectrum of products, from mobile applications and web platforms to content provision across various media technologies, often with opportunities to bypass traditional media 'gatekeepers.' At the same time, the range of business models that can be used to monetize media content is diversifying, creating even greater opportunities for entrepreneurs to capitalize on the changing dynamics of the contemporary media sector.

Africa has become central to world economics and we welcome this show and it is coming from an established brand,” Mr William Bird said. “On another level, it will pose a challenge to local business shows because BBC is an international and established brand,” he said. BBC’s new program was seen as “an opportunity to show how Africa has become a region of growth, vibrant trade, innovation and enterprising people”. To best serve communities, new communication technologies need to be accompanied with quality content as well as education to support the creation and consumption of that content.

“All districts in the country have budgets in billions of Rwandan Francs every year, which the media might want to consider as a source of funding through partnerships with local initiatives. To attract ads, media owners are also urged to do some kind of social engineering to help private investors understand the importance of advertising” said Mr. Jean Bosco RUSHINGABIGWI, the communications officer for the Rwanda Association of Local Government Authorities (RALGA). Here below are shown strengths, weaknesses, opportunities and threatens that advantage the broadcast media in Rwanda:

Strengths

- The broadcast media segment is growing pluralistically; it needs businessmen and businesswomen to enhance it;
- The new information technology in media landscape becomes advantageous for content producers;
- Media sector has generally grown and especially in trainings;
- For the grace of media training schools, the number of journalists increased since after genocide up to 2014.

Weaknesses

- Lack of skills in fundraising and marketing strategies, and hence media have got many difficulties to get money;
- The public media do not have the updated ways of managing media business house. It remains traditional or constant;
- The content producers are in needs of trainings or scholar fees for long trainings abroad in order to be competitive on the African level;
- The private business media management is a big challenge, especially marketing and planning. It is not productive as well and usually they work in disorder. With support from Government and Private Sector, It would be better to fix the same prices for the same products (programs and spots);
- The main challenges faced by the media sector in Rwanda include the language barrier, the international exposure, economic sustainability and the lack of serious competition;
- Limited audience given many are not yet connected to the internet, especially in rural areas;
- The coverage is not totally assured countrywide;
- No enough financial capacity for consumers to get digital TV sets;
- The digital technology seems to be at its grassroots;
- Little local content on RTV (most of the programs are from other international TVs).

Opportunities

- As a piece of advice, BRD invites radio and TV owners, even online mainstreamed media platforms to design good business plan and they will study how to finance them. They must understand that without a good business plan there is no good business. And that is the only way the media sector will improve its business management⁶³;

⁶³ According to Frank ABAHO, BRD Public Relation Officer

- RTV has capacity to afford digitalization, the early problem remains with the population on their side which sounds as great opportunity;
- The general public and authorities deliver more and more information compared to the past;
- Tele 10 is ready to share the information selling platform with media houses⁶⁴;
- National Holding Rwanda agrees to participate in an information-selling platform⁶⁵.

Threats

- The digitalization faces particular challenges, because even professionals do not understand well the relevance of this change. Still there is need of capacity building on that issue, and raise their awareness on the importance of digital system. Training and refresher courses are needed;
- It is important to help some authorities and public members change their mindset vis-à-vis media to understand that journalists are stakeholders not enemies. The cooperation is more needed.

3.6.4 IDENTIFIED SUCCESS FACTORS AND RISK FACTORS TOWARDS GROWTH OF BROADCAST MEDIA

Introduction

According to Research and Markets (2013)⁶⁶, the television and radio broadcasting industry is forecast to witness growth due to the increasing availability of multichannel television around the world, contributing to rising levels of TV viewing among most audiences, which is expected to reinforce television's dominance. The regulatory drive on digitization with increasing mobile and broadband penetration will lead to advertising market increases. Internet-based broadcasting, including Internet TV, online radio, and Internet advertising is expected to be the main revenue stream through 2017, with growing dominance of the Internet experience over all content consumption and new streaming services.

Technological advances are creating new media environments and allowing consumers to enjoy a more involved experience. Structural changes in media markets are also forcing changes in advertising presentation and content, with Internet regulation, and media profitability. Changes in consumer behavior particularly, within the Internet generation have had a profound impact on media consumption habits.

⁶⁴ According to NYONI J Luc, TELE 10

⁶⁵ According to RUGINA Sylvia, NATION HOLDINGS RWANDA LTD

⁶⁶ (http://www.researchandmarkets.com/research/l59rrl/global_television (This Research and Markets study provides an overview of the global television and radio broadcasting industry. The report studies manufacturers serving this segment, providing a five-year annual trend and forecast analysis that highlights market size, profit, and cost structure for North America, Europe, Asia Pacific and the Rest of the World regions).

While it is always a social good to invest in television, the limit of that investment funding must be clearly established at the outset. In the absence of this, the state bears the burden of financing increasing losses. Public broadcasting funding models vary from country to country. There is no one universally accepted model. The same is true of the licensing of commercial channels. Whatever a country chooses to do, it must carve its own path. Other models and processes are important but not transplant in case of local context. This is also the lesson that can be extrapolated from the digital experience around the world⁶⁷. As the following, successes and risk factors were considered accordingly:

Success Factors

- The change in the broadcast segment is remarkable, with a rising number of journalists who have learned the profession.
- The advertising will constitute the main source of revenue in broadcast media, since the Rwandan society is oral.

Risk Factors

- The migration to digital television will face the problem linked with the purchasing power of the population;
- This new system requires the new training of journalists and managers in order to have the best technology and the best content. With good information, the media will succeed, otherwise they will fail. The new system will face the challenge of bad exploitation which can lead to failure⁶⁸;
- No media business management related courses are taught, as university programs are only journalistic;

3.6.5 CORE HUMAN RESOURCE MANAGEMENT IN MEDIA HOUSES

Introduction

By this study, all sampled respondents had chance to respond to all questions they were asked about how media managers take care of human resource management, especially journalists as one of the core aspects of generating income for media houses. Hence, contracts, payment of insurance guarantee and professional taxes stand out as a main credible pillar through life of business entity, and even more for financial institutions.

⁶⁷ According to Dr. Ignace Gatara, former Minister of ICT in the President's Office

⁶⁸ According to Baganaha Reymond from TIGO

A few that are well managed have been successful, because they employ professionals in appropriate positions. The rest are run as family businesses that employ relatives without qualifications. In contrast, respondents answered that state media employ professionals and are relatively well paid, but cases of embezzlement are somehow common.

a) Contracts

Figure 21: Journalists and their work contracts



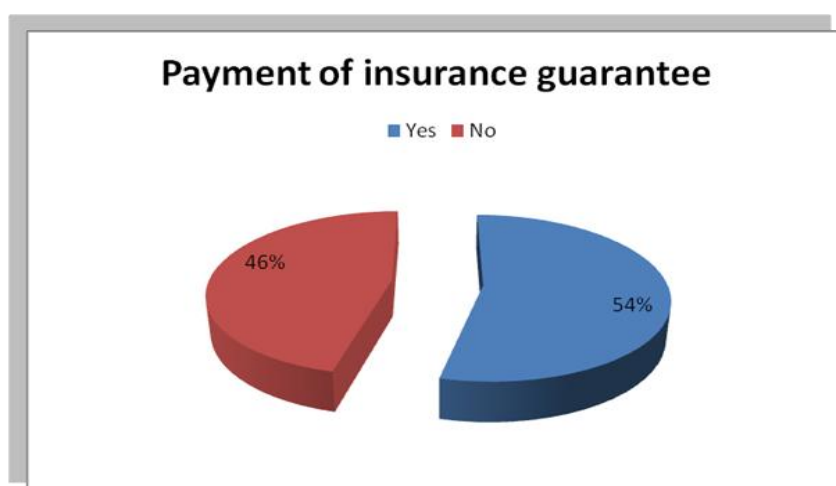
As the above figure shows, permanent contracts in media business entities are rarely considered with only 48% of journalists who have permanent contracts and 53% who do not. For business entity, permanent contracts are key to sustainability of entity for professional staff are willing to hard work and being stable in the same enterprise but things are different for media enterprises in which 47% journalists have temporary contracts against 54% who do not and 41% journalists are working on other form of contracts (like verbal monthly contracts). 59% journalists who are interacting with media houses managers on daily basis for they are working like freelancers with no definite contracts.

Consequently, as regards work experience, most of media personnel do not stand for more than 10 years in media sector including managers are losing hope in media entities and shifting to other business entities that convey and offer life stability. It also has a negative impact on professionalism which tends to low income generating activities for media personnel are not equipped and experienced to be able to attract money from stakeholders and media consumers.

b) Insurance file

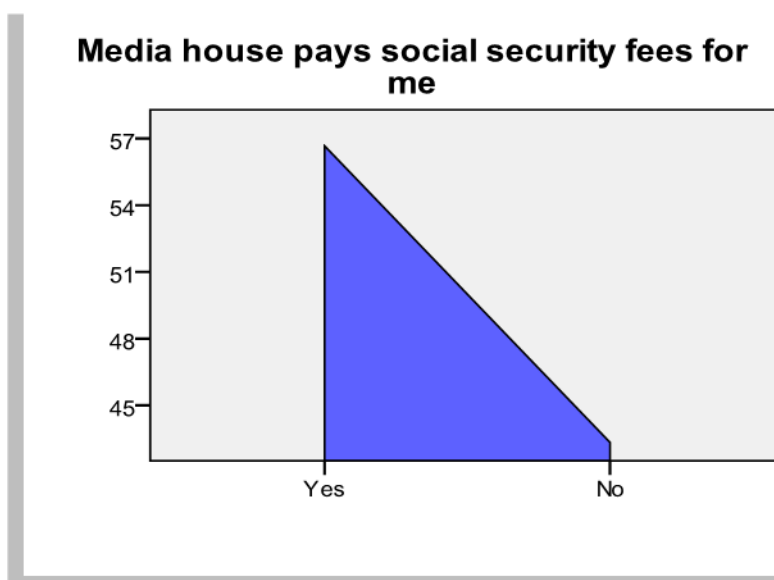
Health insurance and professional taxes are one of documents that indicate that a media organ is right with fiscal and social laws. Since it is registered in RDB, Rwanda Social Security Board (RSSB) and Rwanda Revenue Authority update the file of every business organ.

Figure 22: Rate of health insurance beneficiaries among journalists



More than half of journalists (54%) live at risk based on lack of health insurance guarantee. Only 46% journalists can enjoy health insurance guarantee, managers raised their reasons about this issue, saying that paying health insurance is their concern but it requires being financially stable, when media owners will allow to pay insurance health fees, nothing would be an entrapping issue.

Figure 23: Journalists and their social security guarantee



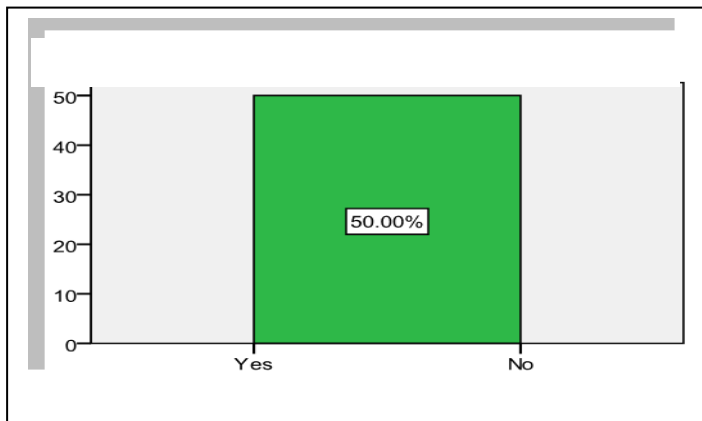
If an accident occurs in areas where journalists are covering, editing publishing a story, and maybe any other media house staff in the newsroom, studios, and toilets or in the offices, RSSB would likely be accountable to the damages and pay the victim. But things are different from media entities where only 57% of journalists confirm that media managers regularly pay their due social security fees to RSSB, but still 43% journalists said the opposite.

As more than a half of both public and private media, houses are registered under social security fund scheme within RSSB. Consequently, some of media entities cannot win tenders on airing certain programs, audio, visual spots, and announcements from public institution only based on breach of paying RSSB fees. Finally, their capacities will be challenged and financially constrained. It may also be one of the reasons many graduates from journalism and communication are not interested in the media sector.

c) Professional tax

Figure 24: Journalists and payment of professional tax

Respondents were asked if their employers pay professional taxes to RRA.

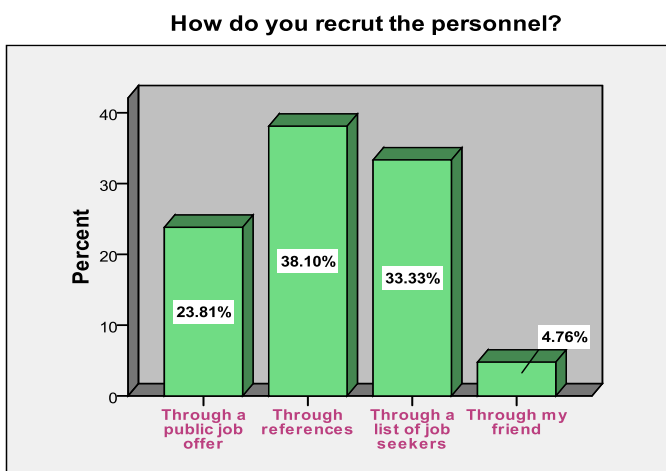


50% said “Yes”, and 50% said “No” to the question meaning how managers and media stakeholders would let managing media human resources go transparent. Consequently, half of media entities may be subjected to punishments as stipulated by the Law N° 28/2012 of 27/07/2012, modifying and complementing the Law n° 16/2005 of 18/08/2005 on direct taxes on income as modified and complemented to date. They will not have chances of winning public tenders; the level of income shall be limited enough.

e) Recruitment procedures

Media managers were asked how they proceed to recruit a journalist. The following figure shows the current procedures used.

Figure 25: Recruitment procedures

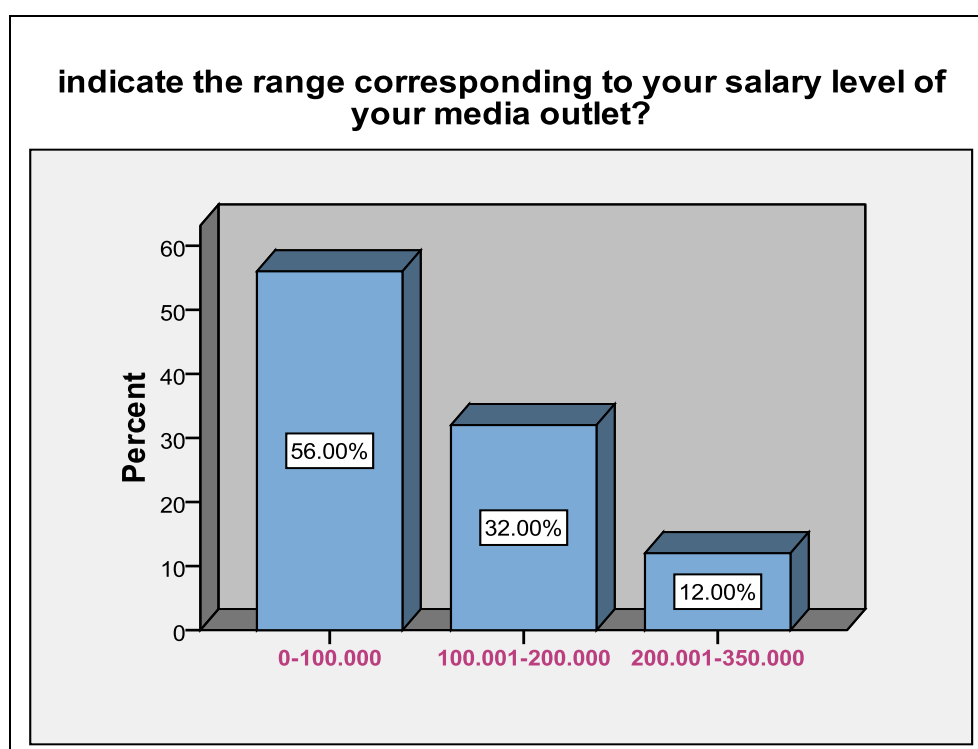


As the above figure shows, the recruitment in media houses is mostly through ways of references with 38.1%, and the list of job seekers with 33.33%. After discussing with radio, TV and print media house managers, low level of scores were given to the manner that jobs were given to friends of managers with 4.76%.

However, no previous ways of recruitment are clear. Recruitment is not transparent at all. As a result, the remaining big challenge is that around 76.19% of jobs in media houses have been given without transparency or competition. Only 23.81% jobs have been given through public competition. Then level of professionalism will be critical in media products for many of employees are not competent, there will be no innovative products, very low research and investigative journalism, lower careless regarding media buyers. Consequently, media buyers will end with no confidence in media practitioners.

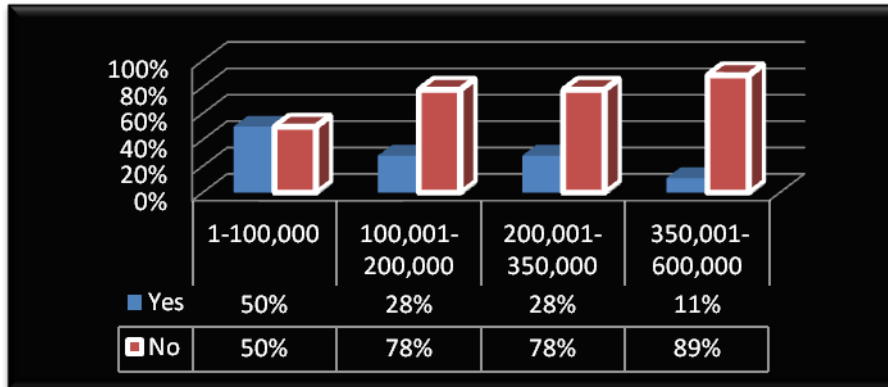
f) Salaries

Figure26: Indicative salary range in print media



In print media segment, lower salary range is [Rwf 1-100,000], which is attributed to 56% of journalists; the average salary range is [Rwf 100.001-200.000] attributed to 32% and the highest salary range is [Rwf 200.001-350.000] attributed to 12%. The big gap is defined by big difference between 88% of journalists with salary range of [Rwf 0-200.000], and 12% who earn [Rwf 200.000-350.000].

Figure 27: Indicative salary range in broadcast media



Data from broadcasting media clarified positive side as Yes and negative side as No to the question of knowing which salary range in a given media house. Salary ranges vary between [Rwf 1-100.000] attributed to 50%, [Rwf 100.001-200.000] attributed to 28%, [Rwf 200.001-350.000] attributed to 28%, and the highest salary range [Rwf 350.000-600.000] attributed to 11%.

Hence, there is up down direction from [Rwf 1-100.000] to [Rwf 350.000-600.000] with around 89% of journalists are paid between [Rwf1-350.000], and only 11% of them paid between [Rwf 350.000-600.000].

However, there are exceptions. Some big media houses pay well their journalists. “Media houses like Rwanda Times pay as much as Rwf 350,000 [\$550] to reporters, while editors earn Rwf 700,000 [\$1,100], which is a decent wage by Rwandan standards.” In contrast, most freelancers earn only between Rwf 100,000 and Rwf 150,000 (\$155 and \$235). Furthermore, the inequality between editors and reporters in all media houses, both public and private, remains high. It implies that good number of professional journalists will be concentrated in the same big media enterprises as well as its brand name becomes prominent. Unfortunately, the small media entities remain with its unprofessional working conditions that finally make them poor and less profitable entities.

3.6.6 TRAFFIC COMMERCE OF MEDIA PRODUCTS

Introduction

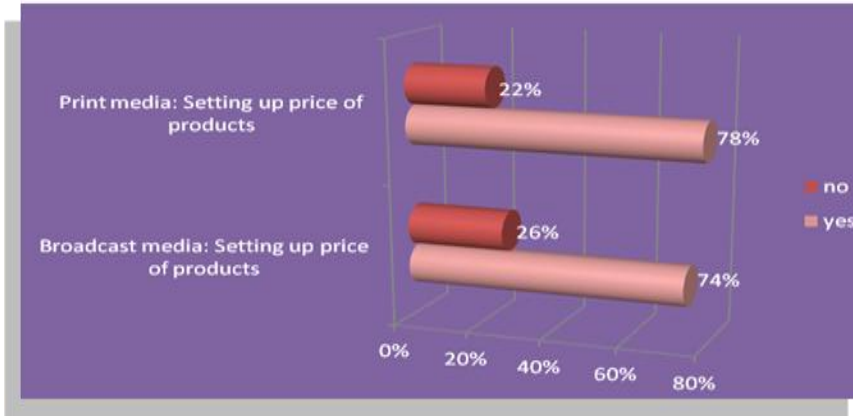
According to the MSI 2012 report, there is no restriction on the importation of materials used in news production, and the only challenge may be taxes charged on them. When it comes to printing of newspapers, the panel noted that the only affordable printing facility belongs to the government. The private media do not get profit of the disposal. “We find it easier and cheaper to print our newspapers in Uganda, where there are no hurdles, apart from paying a small tax of five percent at the border” said a panelist who owns a private newspaper.

a) A free marketing system

By this assessment, there are no harmonized distribution channels for newspapers in Rwanda. Each media house has and manages its own distribution network. Most of these media houses

depend on agents and vendors to sell their products, and they have been successful in this. However, the panel reported that the government, much as it does not control the distribution of newspapers, only subscribes to its own media. Let see the issue about this item:

Figure 28: Set up of prices of selling products



It would be through advertising that print and broadcast media get main income, the reason why 78% of managers of print media outlets and 74% broadcast managers confirm to fix their own prices of advertising.

According to the AMI_Kenya_Report_2012, “news companies own multiple media channels in print, broadcast and online. They also leverage that brand strength across multiple platforms. Using Google ad tools, they monetize their online sites without relying on in-house sales teams. Once again, they have proven that “local news sells”: Citizen Group substantially increased revenues as well as audience by abandoning postcolonial approaches and becoming decidedly local in both voice and content⁶⁹.

In the competition market, the governing law of demands and supply takes place with important determinants like quality of content, coverage areas, and professional staff with emphasis on ethics standards. We encourage this form of market from production up to adverts airing procedures.

Figure 29: Price and cost of production as hindrance to media

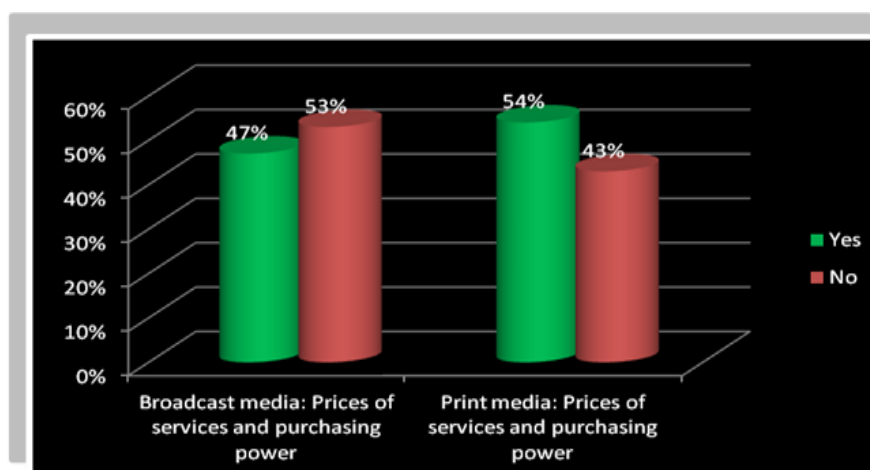


⁶⁹ http://africanmediainitiative.org/content/2013/07/22/WAN-IFRA_AMI_Kenya_Report_2012.pdf

In general, percentages are higher when it comes to cost collecting information in radios than print. However, when it comes to production of newspapers and magazines things are turning very different as compared to production cost of content in radios. By consequent price of newspapers and magazines, it seems to be higher but in addition the price is 16% lower level according to owners of newspapers and magazines and 84% higher level with cost of production, for it cannot turn over all expenditures.

Then, it implies loss for print media. This is probably because accessing print media content is demanding compared with radio stations that largely broadcast in Kinyarwanda. For broadcasting media, there is also difference relationship between price and cost of production with 32% and 68% levels. Then approximately turn over in radios and TV would cover around half of the total cost of production process. And very different from print media turnover is far away from covering the production cost which define that cost of newspapers proves to be higher compared with radios and TV.

Figure 30: Clients and price of services in media



53% of respondents perceived negative relationship between purchasing power and broadcast media services. 47% confirmed positive relationship between purchasing power and broadcast media services. As shown by the figure, there is a little difference of 6% between negative and positive position for broadcast media.

Consequently, the purchasing power of Rwandan people can buy easily broadcasting media products. For newspapers and magazines, 54% of respondents are in positive angle and 43% in negative one, the difference is 11% which implies that not many persons can buy easily a newspaper and or magazine on the street or from any other boutique or shopping mall.

b) Segmented media business market

Two questions aim to show if there is any marketing collaboration between media managers and distributors

Figure 31: Challenges associated with newspaper distribution

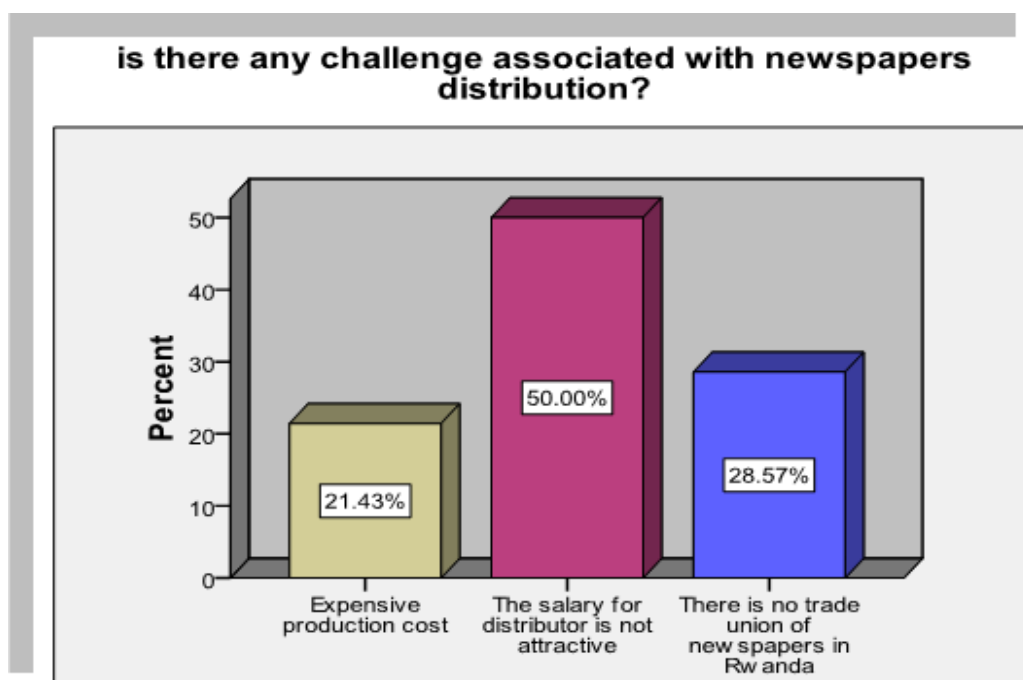
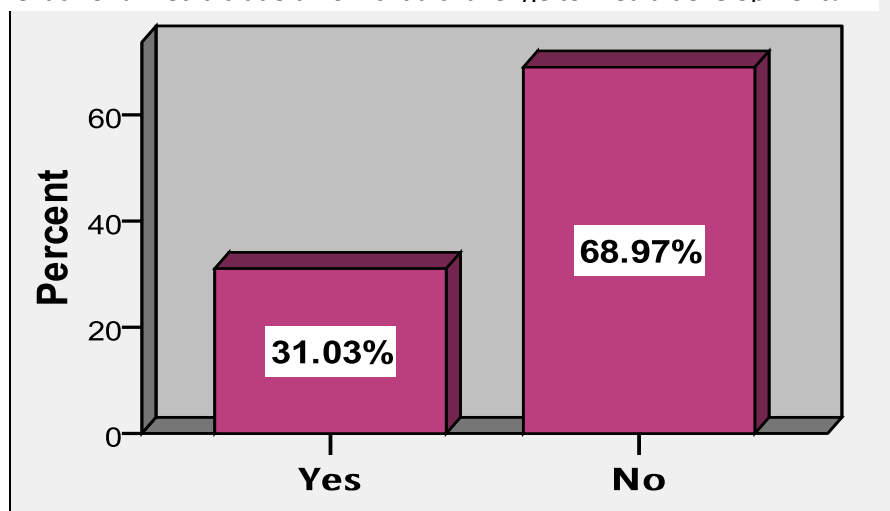


Figure 32. Coordinated newspaper distribution networks

The lack of a media trade union is it a challenge to media development?



The cost of newspapers and magazine production remains a big issue. Journalists and managers continuously confirmed that challenges hindering the development of print media segment are expensive production cost with 21.43%, the non-attractive wages to distributors with 50%, the non-existence of media trade union with 28.57%.

If was existed media trade union in Rwanda the challenge of non coordination of selling networks would not yet be raised. 68.97% of respondents who confirmed the non-coordination of selling networks of newspapers, and 31.03% responded negatively.

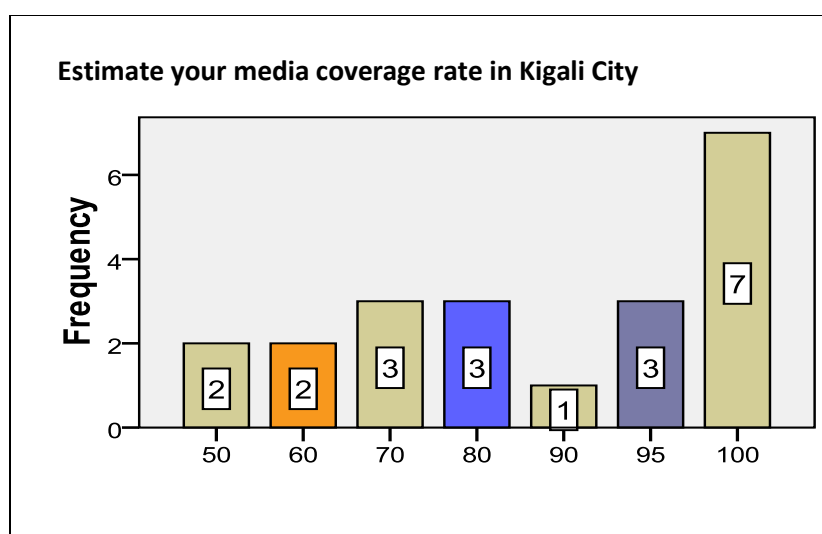
3.6.7 MEDIA COVERAGE REACH

Introduction

According to a recent report by the [African Media Development Initiative](#)⁷⁰, to date, “radio is the most accessible and most consumed media in all of the countries,” with “heavy” listening in South Africa, registered weekly reach figures of at least 90%. Of the countries surveyed, South Africa has the most heavily penetrated radio consumption on both a daily and weekly basis.

Rwanda has an unusual opportunity to expand the recent gains of its news media by creating innovative hybrid media to serve a broader public. This will require new partnerships between journalists, technologists, mobile operators, and development specialists. The benefits from such projects could accrue not just to Rwanda but to other countries of the East Africa as well. As confirmed by managers of radios and TVs, four provinces of Rwanda and Kigali City audience is large to their services and programs on radios and TV. Below is how they have estimated their respective coverage areas.

Figure 33: Estimated rate of media coverage by areas (Kigali City)



As estimated by some media house managers, Kigali City includes 23 radios and two TVs out of 32 radios and two TVs. Among 32 radios and 2 TVs, 7 of them are broadcasting 100% to all borders of Kigali City, 5 are covering 95%, 1 is covering 90%, 3 are covering 80%, 3 are covering 70%, 2 are covering 60% and 2 are covering 50%.

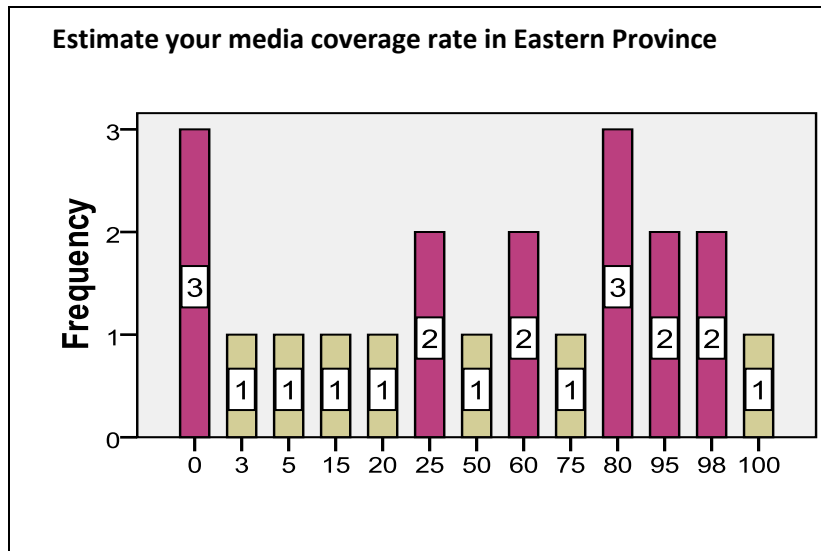
From 90% to 100%, are 13 radios and TVs and from 50% to 80% are 10 radios. Kigali city is Rwanda’s central, administrative and economic town. By the rural exodus phenomena, at least 850,568 habitants (Nyarugenge: M= 148,282; F= 136,578; Kicukiro: M= 162,755; F= 156,906; Gasabo: M= 274,342; F= 256,565) are living in Kigali including businesspersons⁷¹. Business entities like media also are concentrated in Kigali. 10 radios and TVs cover less than

⁷⁰ Read full report at: http://www.bbc.co.uk/worldservice/trusts/specials/1552_trust_amdi/index.shtml

⁷¹ 2012 Population and Housing Census

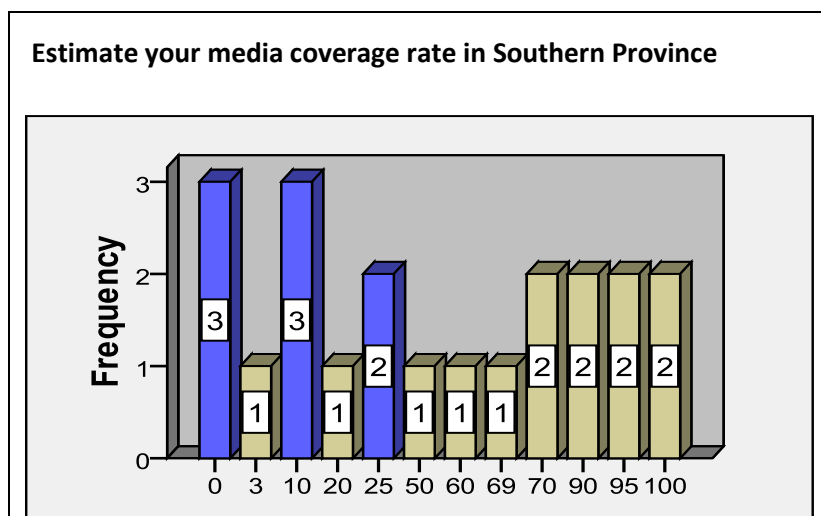
80% of Kigali. Consequently, media buyers of the rest of the country may not be satisfied with that coverage level.

Figure 34: Estimated media coverage by areas (Eastern Province)



Eastern Province has got only two broadcasting radios (RC Nyagatare and Radio Izuba). However, some other radios might be having frequencies in the Eastern Province. Among 32 radios and 2 TVs in Rwanda today, we saw that 3 radios has not reached the Eastern Province, 4 radios are covering from 3% to 20%, 3 radios covering 80% and only 1 radio is covering 100%. The eastern province has 2,573,904 habitants and is comprised of (Bugesera: M= 177,404; F= 185,935; Kirehe: M= 164,012; F= 176,971; Gatsibo: M= 208,355; F= 225,642; Kayonza: M= 167,767 F= 178,984; Ngoma: M= 162,388; F= 176,174; Nyagatare: M= 228,610; F= 238,334); Rwamagana: M= 149,214; F= 161,024)⁷². Comparing to other provinces eastern province is the biggest one but only one radio can cover its land at 100% which implies that significant numbers of population are out of listening radios and reach of media products so the business maybe hindered by that situation.

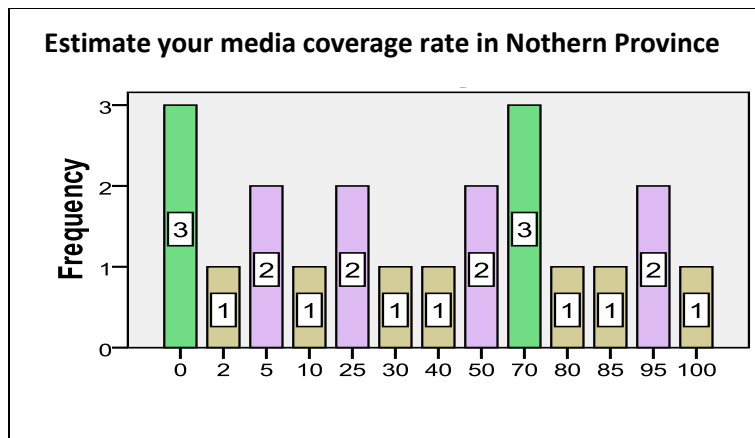
Figure 35: Estimated media coverage by areas (Southern Province)



⁷² Idem

In the Southern Province, only four radios (Radio Maria, Huguka, Radio Salus and RC Huye) are airing. Nevertheless, some other radios might be having frequencies in the Southern Province. Among 32 radios and 2 TVs in Rwanda today in 2013, we saw that 3 radios has not reached the south areas, and other 3 radios covering 10%, 5 radios are covering from 25% to 69%, 6 radios covering from 70% to 95% and only 2 radios are covering 100%. The population is 2,270,722 in (Kamonyi: M= 163,075; F= 179,717; Muhanga: M= 155,193; F= 163,772; Ruhango: M= 153,499; F= 168,522; Nyanza: M= 160,877; F= 162,511; Huye: M= 170,409; F= 158,196; Gisagara: M= 150,312; F= 172,491; Nyamagabe: M= 161, 640; F= 180,472; Nyaruguru: M= 139,428, F= 153,996)⁷³ only two radios display at 100 % its products to the population of that area. When government want to buy media service for public, only two radios can compete for they can cover at least 100% but for the remaining radios, it shall be difficult to win a public tender.

Figure 36: Estimated media coverage by areas (Northern Province)



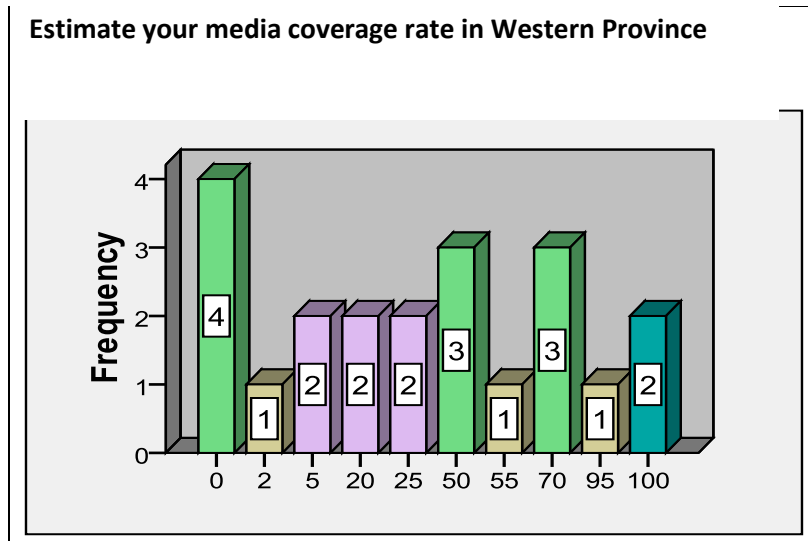
In the Northern Province, only three radios (RC Musanze, RC Gicumbi and Radio Rubavu) are broadcasting from. Nevertheless, some other radios might be having frequencies in the Northern Province. Among 32 radios and 2 TVs in Rwanda today, we saw that 3 radios has not reached the north areas, 10 radios are covering from 2% to 50%, 3 radios covering 70% and only 1 radio is covering 100%. The population is 1,729,927 in the following districts (Musanze: M= 174,760 F= 193,803; Burera: M=160,481, F=175,974; Rulindo: M=136,058, F= 152,394; Gicumbi: M= 189,312, F=208,559, ; Gakenke: M=159,320 ,F=179,266,)⁷⁴.

Only one radio is covering 100% of this area, meaning that a big number of the population are limited to diversified media content from different media outlets. Consequently, 31 and TV have many chances of losing or - media buyers who intend to communicate their programs particularly to the people who are living in the north parts of the country.

⁷³ *Idem*

⁷⁴ *Idem*

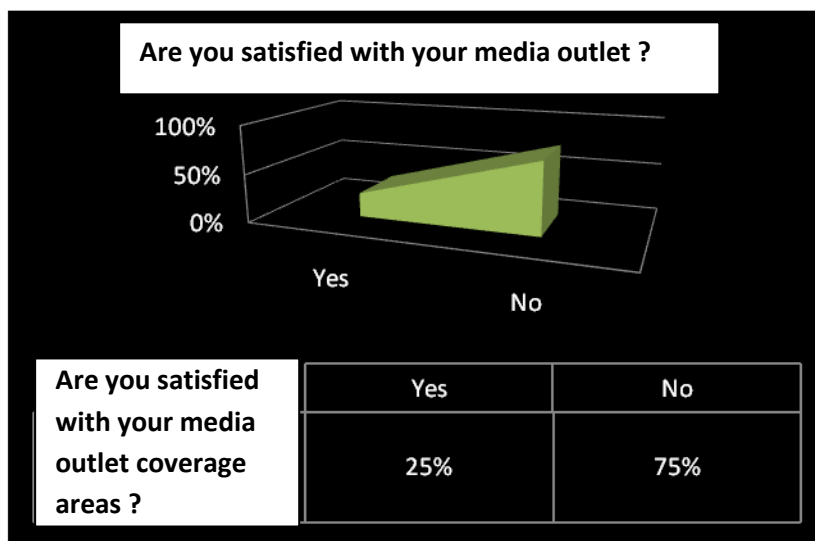
Figure 37: Estimated media coverage by areas (Western Province)



In the Western Province, only two radios (RC Rusizi and Radio Isangano) are broadcasting from. However, some other radios might be having frequencies in the Western Province. Among 32 radios and 2 TVs in Rwanda today, we saw that 4 radios has not reached the western parts, 10 radios are covering from 2% to 50%, 3 radios covering 70% and only 2 radio is covering 100%.

The population is 2,476,943 from the following districts (Rusizi: M=194,310, F=210,402; Nyamasheke: M=179,023, F=204,115; Karongi: M=155,887, F=175,684; Rutsiro: M=152,231, F= 171,020; Ngororero: M=154,827, F=179,586; Rubavu: M=208,938, F=195,340; Nyabihu: M=138,044, F=157, 536.). Two radios are known in the western area with 100% coverage. The same results as the above areas, media managers have to think big how and which ways to come near the rural populations because that would be one way of generating money from the NGOs, Civil Society Organizations, Local Governments and even Private Sector.

Figure 38: General satisfaction with media coverage



The figure shows that 75% of managers are not happy with their areas of coverage, meaning that possibly each radio or TV might have to search how to increase coverage areas. Some of them are reaching 100 % of the four provinces but still more 98% that are not yet reaching all provinces; the whole country. That is a big challenge to media owners and government for you cannot be competitive without enough surface coverage. It implies that Central Government through RURA, RDB and RBA would improve more the digitalization system including fiber optic to reach even that population who are living in lower areas meaning in the valleys under mountains.

3.6.8 THE SIZE AND GROWTH OF MEDIA INDUSTRY WITH REGARD TO FINANCES

Introduction

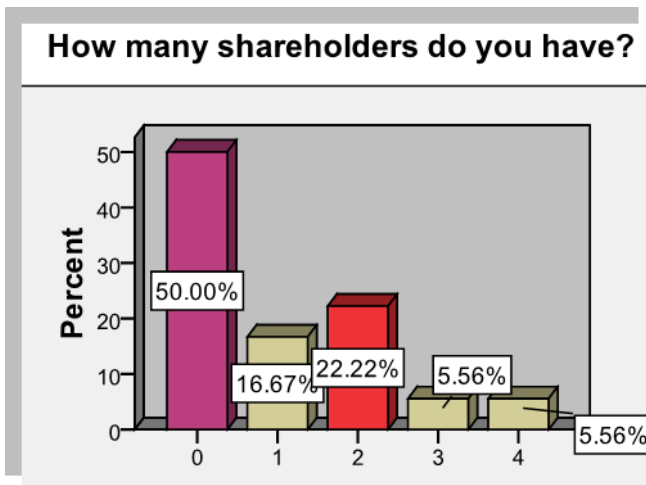
Rwanda's revised media policy (2011) recognizes the need for a competitive – vigorous, cost-effective and challenging media industry. The policy underlines that a vigorous, quality, independent media sector requires a competitive market environment, to ensure efficiency and cost-effectiveness, innovation and attractive products, and diverse market opportunities and interests open to new ideas and initiatives.

Both the public and private sectors need to sit alongside each other, fostering that competition and challenging each other to drive up quality, while ensuring sustainability, positive remuneration, and attractive investment opportunities. Fresh public funding mechanisms will be required to ensure that the transformed public sector broadcaster can operate with accountability but without restrictions that hinder its core newsgathering role and restrict its independence. At the same time, regulations must be in place to ensure advertising and other potential income is available for a growing private sector media.

a) The managing system

Most media houses, especially private and online media, are poorly managed and lack professionals in most of their departments and often end up folding. Owners typically fail to prepare proper business plans, lack professional management skills, and frequently employ unqualified relatives. However, there are some exceptions. Some major media houses are well managed, with proper business plans, structures and qualified people. These media houses have proven successful, generating enough revenue to turn a profit. Let analyze different business scenarios from media houses:

Figure 39: The size of shareholders in media

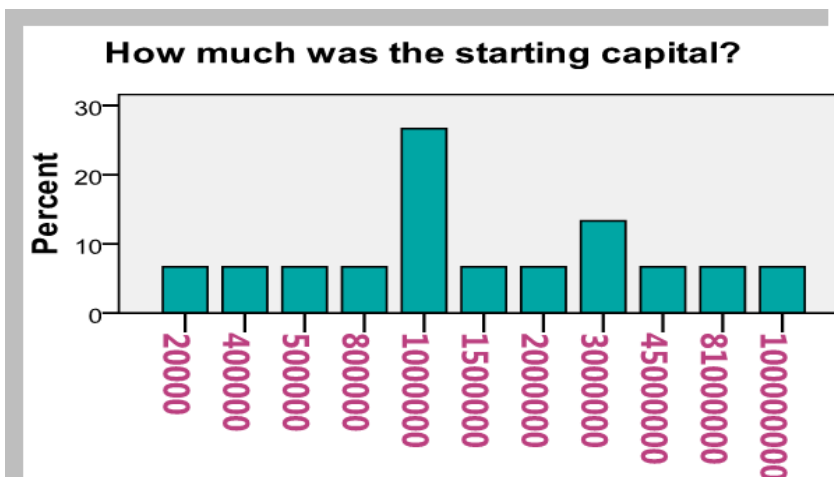


50% of media houses have no shareholders, 22.22% of media houses have 2 shareholders and 5.56% that have 3 to 4 shareholders. The media houses without share holders are not strongly managed. Their sustainability depends only on the professionalism of the staff. That is why media owners should attempt to reinvest their earnings/profits in their staff to keep them motivated and enhance professionalism and subsequent profitability.

b) The financial capacity

The media houses' finances determine the success of the management and some times the professionalism of journalists. We asked about the starting capital of our respondents.

Figure 40: The start-up capital



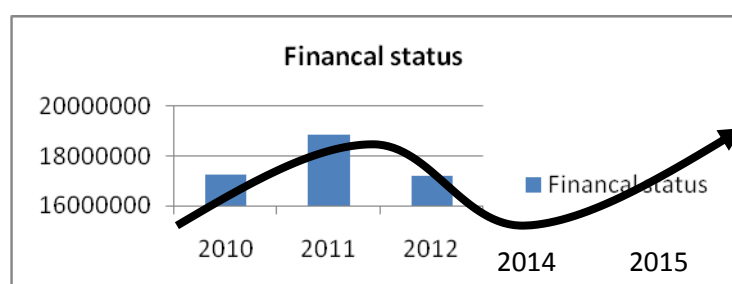
As shown by the figure above, at least 28% of private media houses were starting up with Rwf 1.000.000, at least 15% of media houses were starting with Rwf 3.000.000. Some of respondents who are owners of newspapers confirmed having started with only Rwf 20.000.

According to the Law N°02/2013 of 08/02/2013 regulating media, in its article 11, “Right to establish a media company, a journalist has the right to establish a media company is recognized to any person or legal entity in accordance with the provisions of this law and other laws”. The law has provided no consideration of the starting capital.

b) The estimated net income/profit during the last three years in private business radios

During the assessment, NGOs, local governments and government institutions asked media managers about the income generating products that have been mainly advertisements but not limited to finances from different important programs funded by NGOs, government institutions, local governments and civil society organizations and or faith-based organizations. The following financial status for the last three years was collected from media outlets on permission of media managers.

Figure 41: Financial status during the last three years and projections



The year 2013 has certainly stagnated in the general incomes of media companies. Individual efforts of managers to make good statistics should contribute to general enhancing the sector. Three broad areas have been identified as necessary for private sector media development and financial growth and stability: cost-cutting and improved efficiency; improved access to finance; and increased advertising revenues.

Mr. James Sserugo, *the co-founder Monitor Publications Ltd* attributes the phenomenal growth of the *The Monitor* largely due to the adoption of best practices in media management: professionalism in the editorial management (growing young readership, developing good distribution networks, living to the true calling of service to the public diligently, diversity of content, advocacy, institutional alliances, etc). The personnel are professionally hired, motivated, inspired, encouraged and trained; the business is well managed and finances professionally controlled; marketing and distribution channels are wide, customers are well-researched and appreciated; the company tries to keep out of legal tussles (but hires best lawyers). In general, Sserugo asserts that the *Monitor* has succeeded through hard work, persistence, staff motivation, financial discipline and knowing when to engage a strategic investor.

c) Planning documents in media houses

The assessment brought out gaps regarding planning documents as tools of professional working activities. “Solid project planning is a prerequisite for project success. Poor planning,

meanwhile, can lead to missed deadlines, budget overruns, poor quality deliverables, frustrated project teams and even project failure” said By *Marian Haus, PMP* (Nov. 2011).

As described by the Black’s Law Dictionary, here are well defined what are market plan, business plan, strategic business plan, and capacity building plan:

Market Plan: based on market strategy, it is describing activities involved in achieving specific marketing objectives within a set timeframe as this type of product specific, market specific, or company-wide plan. Beginning with conceptualization, the [identification](#) through [market research](#) of a customer’s needs, then designing how the firm intends to meet these needs while realizing an [reasonable rate](#) of return. Thorough analysis of the current market situations, pointing out opportunities and trends leads to detailed action programs, budgets, sales forecasts, strategies, and projected, preformed financial statements.

Business Plan: is a formal statement of a set of business goals, the reasons why they are, believed attainable, and the plan for reaching those goals. It may also contain background information about the organization or team attempting to reach those goals

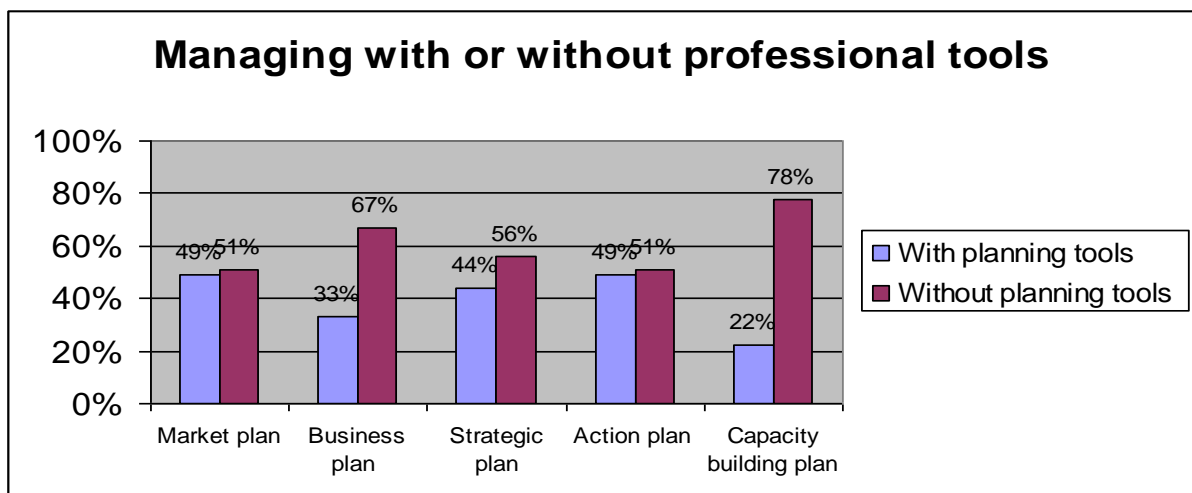
Strategic Business Plan: Internal document that will first outline the philosophy, purpose and direction of the [organization](#) second examine its current status, [SWOT analysis](#), third set [long term objectives](#) and fourth set short term tactics to reach objectives.

Capacity Building Plan: is defined as the ability of the individual, organizations or systems to perform appropriate functions effectively, efficiently and sustainable. There is no single definition of capacity building over the years, capacity building has moved from being a focus, to concern individual training, the development of institutions and recently a complex systems philosophy where individual capacities are linked with those of institutions and system at large. Recent definitions emphasize the continuing process of strengthening of abilities to perform core functions, solve problems, define and achieve objectives, and understand and deal with development needs⁷⁵.

As defined above the same questions posed to media managers so that they approve or disapprove the availability of the planning documents in their respective entities.

Print Media: In the print media segment, different newspapers and magazines are surviving without any documents, but as the below table illustrate, more than a half of all media outlets operating as print media do not have the planning documents.

Figure 42: Availability of planning documents



⁷⁵ UNDP (1997); UNDP (1998); UNESCO (2005).

Print media managers do not have planning tools. The findings of the study indicate that capacity-building plan is the most lacking tool where 78% of interviewed managers do not have it. The following is market plan and action plan which are lacking at the same level of 49%, strategic plan at 44% and business plan at 33%. So as defined above to reach successful results requires more efforts in planning but for print media outlets is not the case because most of them are working without plan or visions. It will be acceptable to say that print media practitioners cannot survive for long time if they do not turn to planning.

Broadcasting media: a bit little difference separates broadcast media outlets from print media, is that 63.16% of radios and TVs have business plan, 52.63% have strategic business plan, which are more important for the business life. However, 52.63% of radios and TV do not have marketing plan and yearly action plan and something bad for this segment they do not rely on capacity building plan which 78.95% of them do not have it.

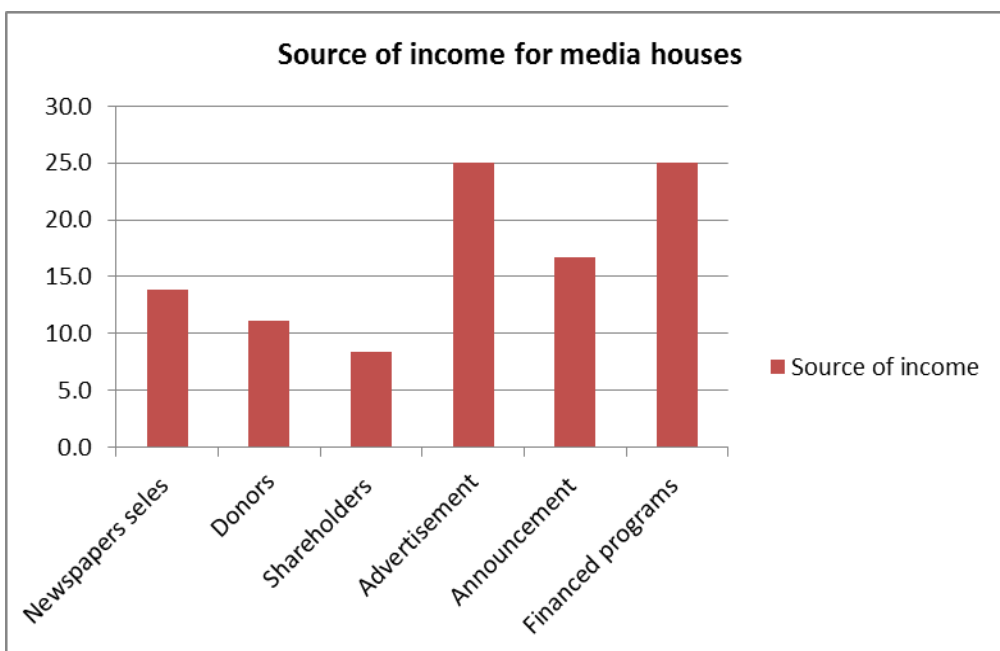
More than a half of media managers work without business management tools. They work in traditional style of life without plan. Nevertheless, today, the economic pressure does not allow doing business without plans. Furthermore, the lack of capacity building plan is a crucial gap, because the updating of the technology and the reinforcement of the human resources' skills is the only way to keep up with the economic success and professional performance.

Furthermore, banks can not finance a media project, when the manager do not show clear planning document from the last three years to the coming three years of his organ. Media in Rwanda is still lagging behind because of this issue, if nothing is done to remove these situation media entities shall not survive without the planning culture.

d) Main source of income

No media outlet can operate without funds and generating income projects, important questions here were asked to media managers in order to assess which source of their income is more profitable than others are.

Figure 43: The main source of income



As shown by the figure above, managers of newspapers confirmed to have income from sales of newspapers at 28% and reject the statement with 72%, which implies that they might have other important source of income rather than selling newspapers. In general, media managers stated that income from donors is around at 20% and nothing from them at 80%. In addition, contributions of shareholders are by 15% and 85% who said that generated incomes are what they usually used in the daily management of media house.

The same as in broadcasting media enterprises, advertisements contribute to revenue in media houses at 45%, announcement at 30% and fixed financed programs at 45%. As indicated, again by the figure the source of income for media houses is in major portion with 45%, 30%, and 45% from advertisements, announcements and fixed finance programs respectively.

e) The advertising industry as major source of income

The advertising industry has changed dramatically in Rwanda in the last 2013. According to the journalists and managers, all the foreign advertising agencies that once dominated the business closed now, largely because of the economic climate. Many of these firms were Kenyan, and by the time they left, they were not making enough money in the Rwandan media market to sustain their operations.

Some of the major advertisers include mobile telephone companies, breweries, and soft drink companies. In print media, it is common for editors to feel forced to drop stories for advertising. Some newspapers are referred to as seasonal media, because they only come out when they receive advertising business. In addition, broadcast media tend to run many commercials to raise revenue at the expense of quality programming.

Government subsidies for private media are nonexistent, although government-friendly media houses are favoured and rewarded with advertising.

Meanwhile, some private media organ succeeds to have enough revenue from advertising, Radio Flash, Radio One, Isango Star Radio, for instance. But if these commercial media do not pay attention, advertisers firm tend to abuse and harm the informational programming. This is called cannibalism and it is professionally prohibited. The MHC and Rwanda Utility Regulation Authority should fix the rate of advertising not to go over.

f) Research and technology department

Journalists and managers agreed that only a few big media houses carry out research to plan properly and attract more revenue through advertising. Research also helps the media houses to tailor their products, learn about their listenership from electronic media, and determine which way to go for better results.

One interviewee noted that “Media houses that undertake such research have been very successful in growing their listenership, audiences, and readership.” However, a majority of the media houses, especially electronic media, do not see the need for surveys and research. In 2012, only two media houses, Radio Flash and Ishema, conducted such research. Some of the methods employed in this kind of survey include call-in requests, questionnaires, and samplings. Radio Flash is now one of the successful media experience in Rwanda, probably because of the consideration of the results of the survey conducted.

According to RURA report of 2008, there has been established a possible revenue sources framework for media in the digital framework. These sources include:

- **Customer revenues:** are based on the additional value of mobile TV Services (Monthly subscription fees; Pay-per-view; Time based charging; Premium SMS charging for interactive services; and Internet charging mechanism);
- **Advertising:** Selling airtime; Combined broadcast advertisement and personalized advertising; features using interactive channel;
- **Broadcast network access:** Potential interest in securing access to mobile broadcasting to extend coverage of area and/or time of the day⁷⁶.

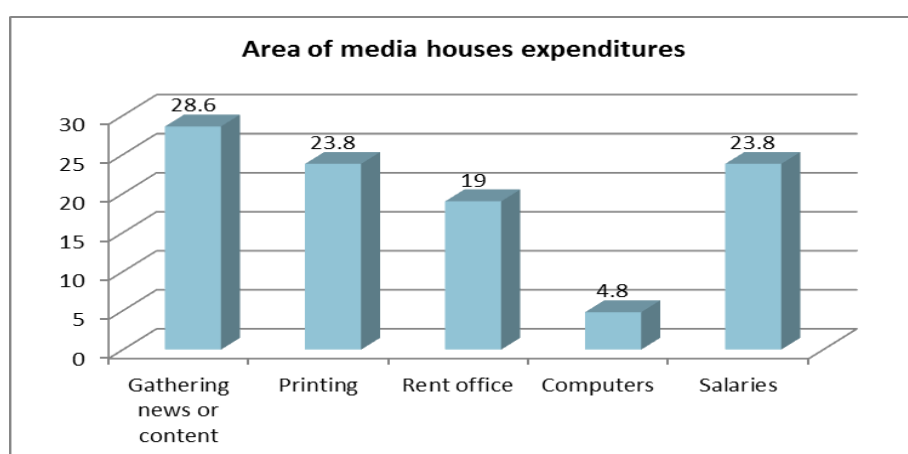
Also by those who are optimistic, like Katuramu, a panellist of the 4th national dialogue on media department, argue that media economic difficulties are surmountable. He said “With all our humble starting and in a naïve industry operating from a back ground of a dominantly monopolistic market, none of the above have closed shop since our opening and none of us has declared being bankrupt even after the challenges we may have faced initially. This means there is a light at the end of the tunnel”⁷⁷.

g) Budget Expenditure

As said by Mr. Kabral Blay-Amihere “to become more professional, media houses could look the other side of capacity building and invest some of their revenues for it will ensure their independence and effectiveness. For example, a Broadcasting Fund that would be funded through contributions and levies from the electronic media could assist in the development of the industry.” The question to be asked here is, how much of the dividend that media pay every year goes to strengthen the industry and the other media? I challenge the owners of media to give full consideration to the matter, in consultation with all stakeholders⁷⁸.

But it is a considered view that a funding mechanism will not only help smaller media organizations expand, increase their volume, reach and diversity of content, bolster their profitability, but will ensure that media does not forget its social impact mission as well. If facilitated, the media would be able to cover the social impact stories unfolding every day in all parts of our fast growing economy but mostly rural areas that have rarely seen the attention of media.

Figure 44: Budget expenditure lines (%)



⁷⁶ RURA (2008). *Managing the change from analogue to terrestrial digital broadcasting in Rwanda*

⁷⁷ Katuramu, K. A. (2011). “Enhancing Private Sector Investments in Rwandan Media: The experience of Rwanda’s liberalized commercial broadcasting”, MHC, 4th National Dialogue on Media Development

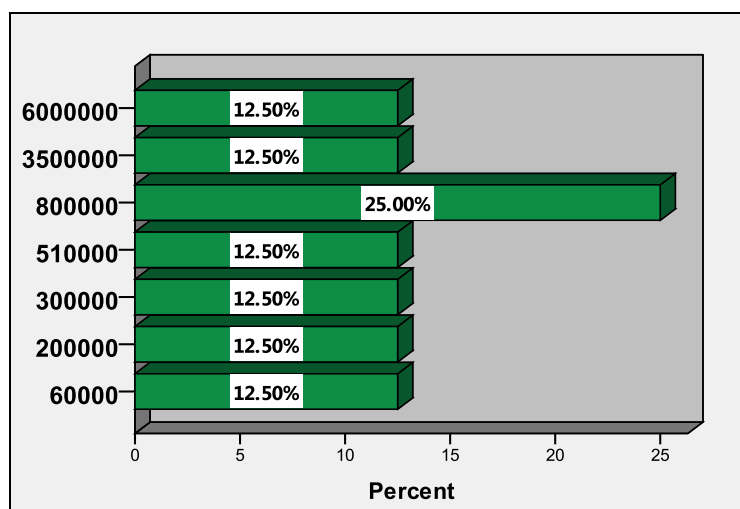
⁷⁸ Statement by the Chairman of the Ghana National Media Commission (NMC), Mr Kabral Blay-Amihere. <http://graphic.com.gh/archive/Business-News/lets-dialogue-on-capacity-building-for-state-media.html>

As the above figure shows us rate of 28.57% of revenue of media houses are spent in gathering information on the ground, 23.81% of revenue paying to printing machine, 19.05% revenues are paid to owner of renting house, 4.74% revenues are paid to buy computers or maintained services, and 23.81% revenues are paid to staff. Apparently, a big sum of money is spent to works of gathering content from the ground, secondly printing and salaries are main expenditures.

h) VAT Payment

Business media entities are registered in RDB, and registered to RRA VAT as taxpayers who are expected to be accountable as other business entities in the country. When the time is on the managing director must fulfill the responsibility to RRA. Relevant questions here were asked to managers for purpose of assessing their understanding of this responsibility and check whether they accomplish well it as expected.

Figure 45: VAT payment



The above figure illustrates that only 25% of media houses which are around 14 media houses have paid Rwf 800.000 each of them to RRA but the remaining sides are 12.5% of media houses who are 6 media houses that have been selected on scale between Rwf 60.000 and 510.000, Rwf 3.500.000 and 6.000.000 each of them paid to RRA. They do as expected by RRA depending on the category in which media entity was registered. Prints as well as broadcasting media are not opposite to this responsibility and they fulfill it seriously when it comes to pay VAT. Moreover, this has great impact of the development of media entities specially for winning public tenders.

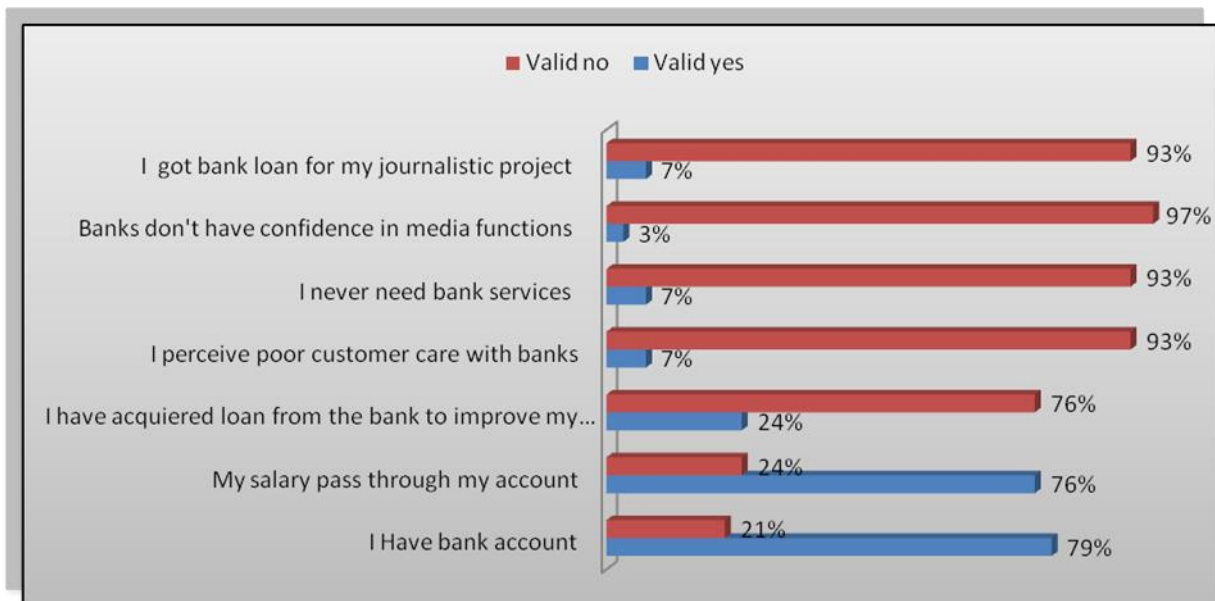
i) Cooperation between banks and print media outlets

Despite the lack of media sector demands in the bank file, journalism is an opportunity as other economic sector. The banks have not yet studied that market and cannot conclude now on its potentialities.

The banks welcome the media stakeholders to address the good business plan and they can study how to finance them.

“They must understand that without a good business plan there is no good business. That is the only way the media sector will improve its business management”, said Shivon Byamukama, Company Secretary and Head of Corporate Affairs at Bank of Kigali.

Figure 46: Cooperation between banks and print media outlets



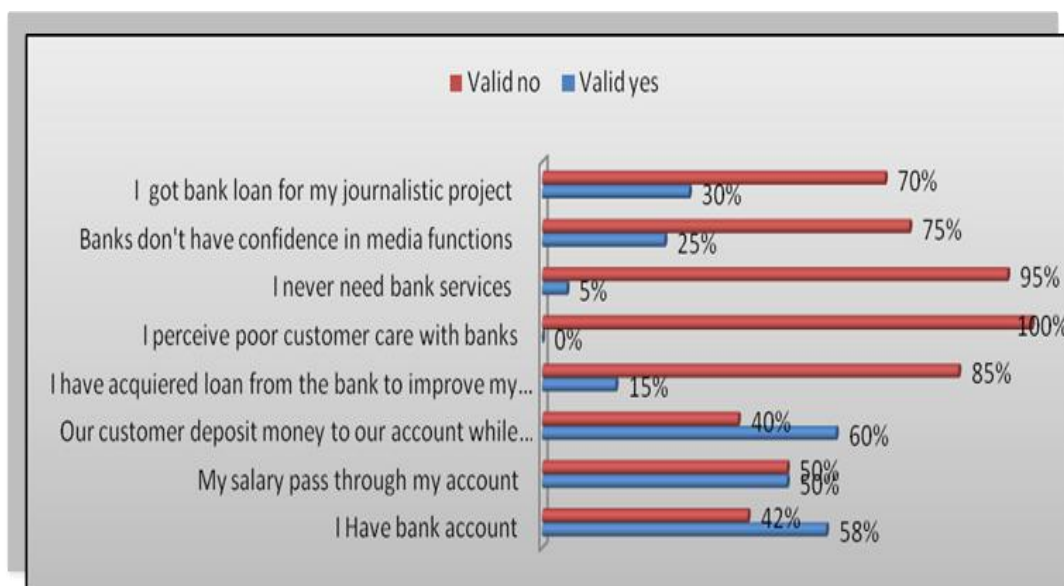
Banks as financial institutions are working closely with print media. 79% of print media managers confirmed to have bank accounts of company and of its staff, only 21% of them rejected the statement. 76% managers accepted to pay their staff through banks accounts against 24% managers unwanted to do the same. 76% managers acquired loan from the bank to improve or implement the life business. However, for journalistic projects do not have chances of having access to bank loans at level of 93%, only 7% positive agreement to have journalistic project loans from the banks. In contrast, 97% of print media managers perceived that banks have confidence in print media functions.

j) Cooperation between banks and broadcast media outlets

Banks as financial institutions are running less closely to broadcast media than the previous print media segment. Among business projects that would meet their interest, the new technology.

Frank ABAHO, BRD Public Relation Officer said: “If media managers come with a software project, the BRD will be pleased to finance it. The same if a paper factory project is well studied and presented, it should offer jobs and develop the media sector. In the same way, a project consisting on increasing readership and literacy should meet also our interest. The education for development is one of the priorities of the Rwanda development Bank (BRD)”.

Figure 47: Cooperation between banks and broadcast media outlets



58% of broadcast media managers confirmed to have bank accounts of company and of its personnel, compared to 42% of them who rejected the statement. 50% managers accepted to pay their staff through banks accounts against 50% managers unwanted to do the same. 60% of broadcast media buyers are paying through bank accounts of the company and 40% of clients are paying directly to cash receivers at the company's offices.

15% managers acquired loan from the bank to improve or implement the life business. However, for journalistic projects do not have chances of having access to bank loans at level of 70%, only 30% positive agreement to have journalistic project loans from the banks. In the contrast 75%, broadcast media managers perceived that banks have confidence in businesses.

3.6.9 LOGISTICS AND ENVIRONMENTAL WORKING CONDITIONS

Introduction

The Government of Rwanda has embarked on a strategy that aims, among other things, at developing a vibrant ICT industry and position Rwanda as the Regional ICT hub⁷⁹. NICI Plan III (2011-2015) was initiated with a special emphasis on the development of services in five key areas, such as skills development, Private Sector Development, Community Development, E-Government (e-GOV), and cyber security⁸⁰.

The development of media sector cannot be a reality if there are no technological facilities to gather, analyse and distribute news and information. Such facilities imply a whole range of infrastructures that require commitment from the government, the private sector and the civil

⁷⁹ Ministry of Youth and ICT (2012). Rwanda ICT sector profile 2012. "Measuring ICT sector performance and Tracking ICT for Development (ICT4D) towards Rwanda Socio-Economic Transformation". Accessed from www.myict.gov.rw

⁸⁰ Rwanda NICI Plan III 2011-2015. Available from <http://myict.gov.rw/ict/policies-publications>

society organisations. As stated by the MHC, the development of capacity amongst entities in the media sector in Rwanda will require constant interaction between professionals, media organisations and entities in the media sector to ensure needs and requirements are understood and resources directed in areas that are identified for support⁸¹.

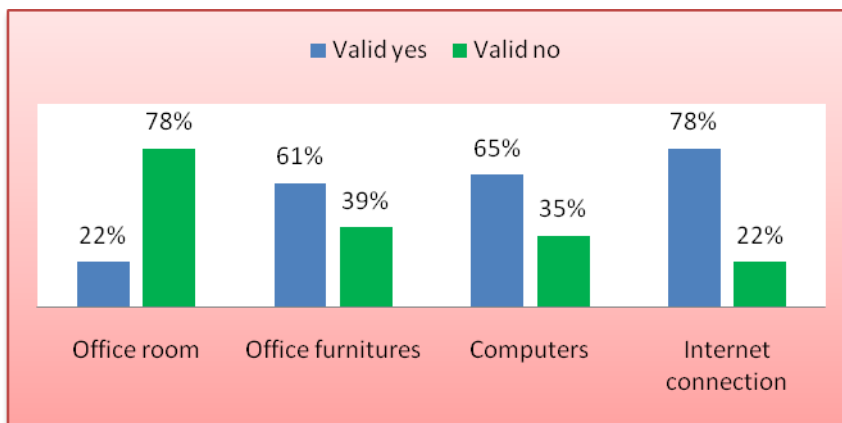
According to RMB 2013, 68.1% of media workers have access to modern technical facilities for newsgathering, production and distribution. These include largely studios, computers, internet, and mobile phones.

a) Logistics in Print Media

Although some media are able to provide their journalists with tools such as internet modems, cameras, laptops and recorders, problems are still there as there are cases of journalists who can spend more than three days in some rural districts without being able to post a single article, video or picture, which patently affects the job of their media houses.

In addition, despite the progress discussed above, some media practitioners who were interviewed in this assessment were of the view that the step taken so far in using new technologies in media remains insignificant. First, they maintained that Internet connection is slow. This is a considerable hindrance for journalists who report far from their media houses and want to send their contents (pictures, videos, stories, and audio supports) via Internet

Figure 48: Logistics in print media outlets



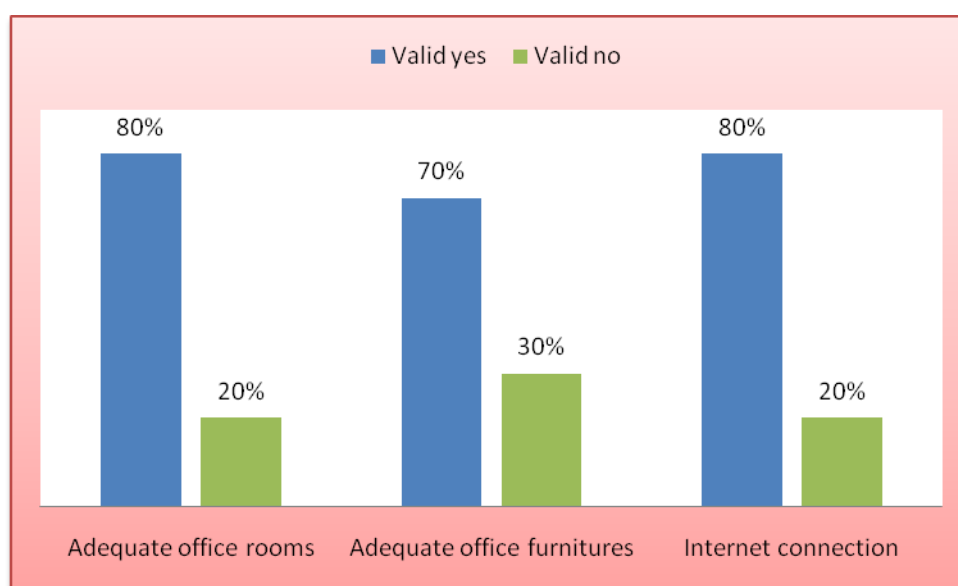
It illustrates that print media practitioners are having access to internet connection with 78% but without working offices at the level of 78%, which would tell us that they get access to internet either from MHC-Rwanda Press Centre, internet cafés, hotels, bars, or by using MTN Modem, TIGO Modem and or AIRTEL Modem. 65% of print media practitioners have computers, 22% of them have offices and 61% with office furniture. Two of the main challenges in the print media; one is working office, second is poor or slow internet connection.

⁸¹ RMB Report 2013

b) Logistics in Broadcasting Media

Rwanda was ranked the most dynamic African country in the field of ICT⁸² by the ITU. Early February 2013, an ICT literacy campaign was launched countrywide with the objective to acquaint with the use of ICT at least 200,000 Rwandans in a 6-month period⁸³. A 2013 analysis of worldwide broadband download performance ranked Rwanda in 62nd place worldwide with an internet speed of 7.88 Mbps as of February 2013 and first place in Africa for downloading speeds⁸⁴. By this assessment, the purpose was to assess the degree by which broadcasting media is really in need of adequate office rooms, adequate office furniture and fully completed and desired internet connection

Figure 49: Logistics in broadcast media outlets



About broadcast media, media managers said during group discussions that first of all strong internet connectivity requires adequate IT facilities, and rooms or studios. The figure above illustrates that 80% broadcast media outlets are okay with their working rooms including studios but still no negligible data is 20% of them are without adequate working rooms. 80% of managers confirmed to have internet connection tough it is running slowly and 20% against the assertion. 70% managers are with adequate office furniture against 30% who do not have.

The challenge remains about the ICTs and internet connection. In addition, the business is very constrained by slow internet connection, which 80% of broadcasting media managers required strongly the internet and adequate office rooms including modern studios.

⁸² Accessed from <http://www.humanipo.com/news/1884/ITU-report-ranks-Rwandas-ICT-sector-most-dynamic> On February 24 2013.

⁸³ "ICT literacy campaign gets under way". Accessed from <http://focus.rw/wp/2013/01/ict-literacy-campaign-gets-under-way> February 19, 2013.

⁸⁴ Net Index, "Rwanda," Download Index, accessed February 24, 2013, <http://www.netindex.com/download/allcountries/>

3.7 CAPACITY BUILDING NEEDS ASSESMENT

3.7.1 INSTUTIONAL CAPACITY BUILDING GAPS AND CHALLENGES

Introduction

Today, media business management is taught in different academic institutions. It has become a new way of sustaining the media sector in developing a great number of professionals who combine skills in journalism and skills in business management. Marketing techniques are now coupled with journalistic axes such as content, advertising, news, entertainment, etc. The management strategy of human resources, content and distribution is part of main key success factors in media business.

However, this good number of the capacity building strategies is not successfully applied to meet the needs related to the challenges facing the media business sector in Rwanda. Following are causes of the gaps:

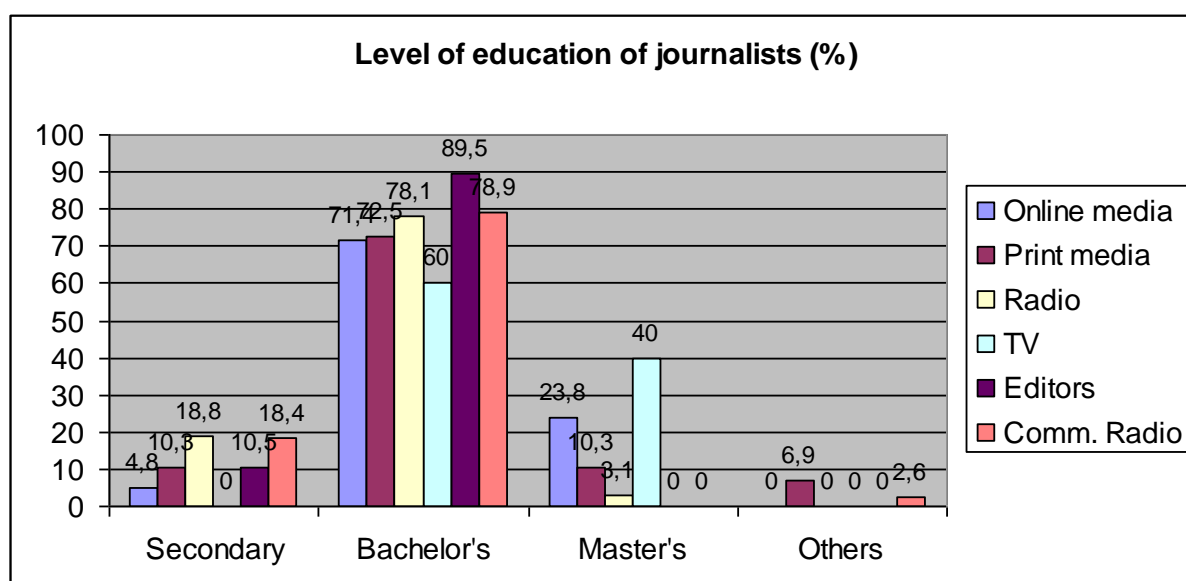
The Rwanda media sector is young, neither specialized nor experienced

Thanks to friendly media reforms, the post-genocide Rwanda has paved way for a more liberalized media sector with the establishment of more newspapers and radio stations. To-date, there are about 40 registered newspapers, 32 radio stations, two TV stations, and 34 of online mainstreamed media.

Three journalism academic training schools raised in the country and provide many postgraduate journalists. Bachelors represent 77% of employee's degrees now. But few of them are over 5 years experienced.

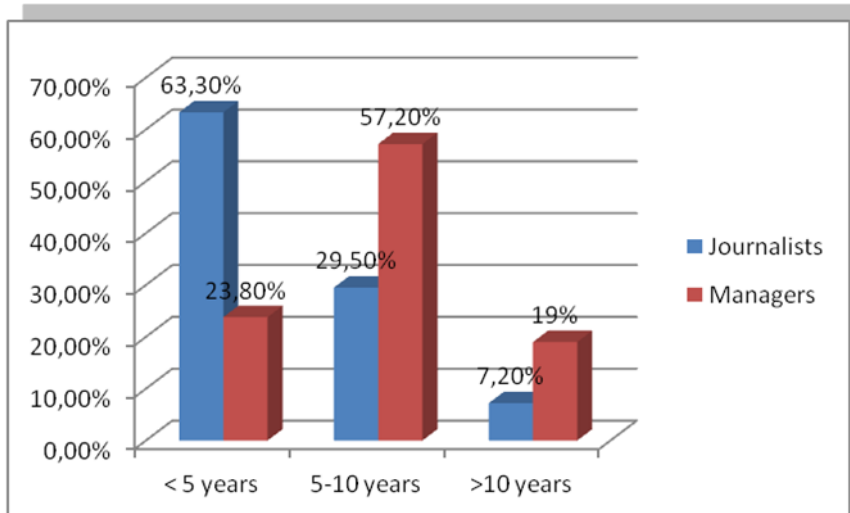
Below tables shows us how different media segment platforms employ journalists with inequalities between education level and working experience:

Figure 50: Proportion of respondents according to education level



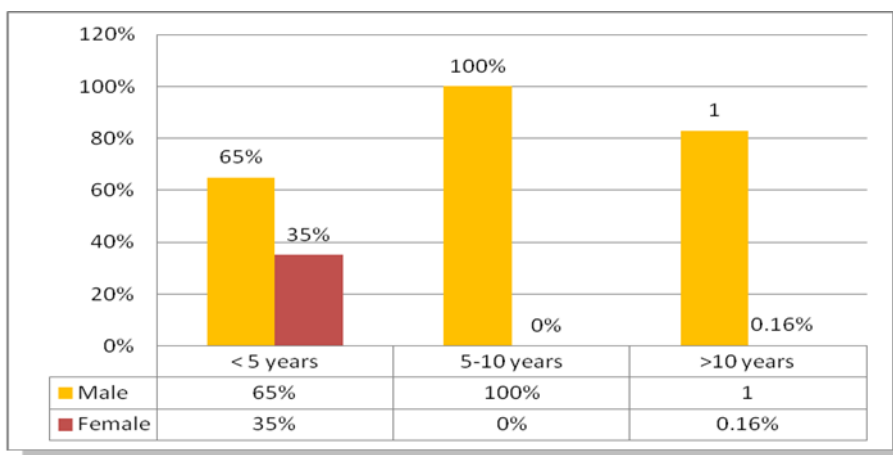
As the above table demonstrates, at least 77.1% media practitioners hold Bachelor’s degrees and at least 7.6% holds masters’ degrees with at least 13.2% holders of secondary levels. Community radios are first employers of many journalists including internees, second entities are commercial radios including RBA, third entities are print media and final entities are online mainstreamed media.

Figure 51: General experience of journalists and managers in media sector



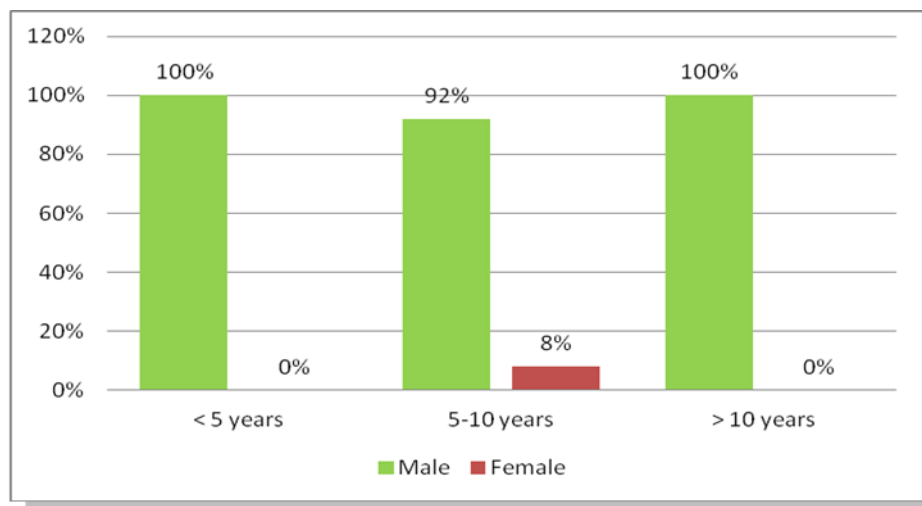
144 journalists and editors and 26 media managers have participated in this study. Their experience, 63.3% of journalists have spent less than five years in media sector and 57% of managers have not yet spent over 10 years. Between 5-10 years journalists are backsliding from 63.3% to 29.5% at least, a half of them left out the journalism while more than half of managers meaning 57.2% enjoying the sector. But along with 10 years of experience a great majority of journalists and managers become reluctant of media sector and this affects negatively the sustainability of media business houses for large of number of experienced journalists within sector are going out and being replaced by new comers. The lack of innovation in content production and in management may be caused also by that factor.

Figure 52: Gender and experience of print managers



As the figure above illustrates, female managers are still few in media and having little experience by which 35% of women proving a working experience of only 5 years in print media section while 65% men have the same working experience. On the range of 5-10 years, 100% are men and over 10 years around 100% are men and 0.16 women at least.

Figure 53: Managers' experience in broadcast media



For broadcast media, women prove the difference with 8% for long-lasting working experience over 5 to 10 years. Still men are dominant in broadcast media management team with 5 years and over 10 years of working experience.

3.7.2 INDIVIDUAL CAPACITY BUILDING GAPS AND CHALLENGES

Introduction

Particular challenges were highlighted under this assessment and include the fact that trainings for media practitioners remain not yet satisfactory, both in number and nature. Media practitioners work in economically unstable conditions, lack of consultations in decision-making processes about the allocation of frequencies, lack of regular consultations with CSOs and the media sector to design the plan for spectrum allocation, as well as discrimination between State owned and private media outlets as regards to allocation of advertisement.

a) Gaps in business management

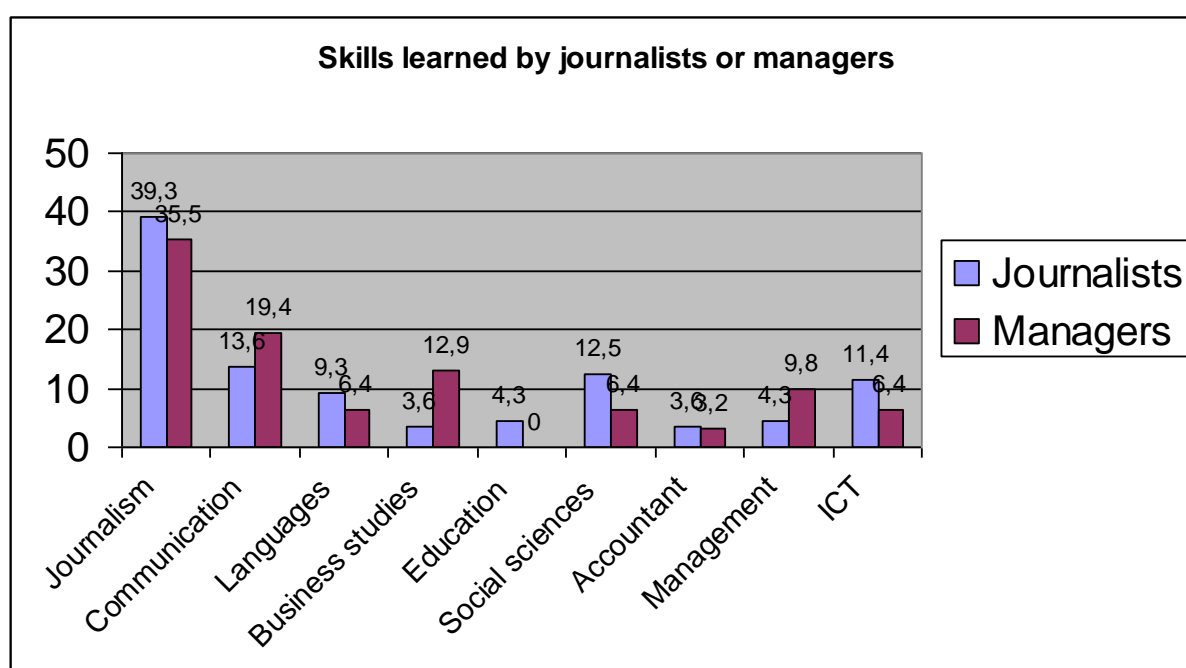
In response media managers request training in various financial management skills such as formulating marketing strategies, preparing funding proposals, and basic financial management. Here we take an example of other countries' needs found out after researches in

Botswana, Malawi, Swaziland, Tanzania and Zambia. Participants prioritized their training needs as follows⁸⁵:

- (1) Leadership = 59.25%,
- (2) Human Resource Management = 46.3%,
- (3) Editorial Leadership = 40%,
- (4) Financial Management = 35%,
- (5) Management of Materials = 32.3% and
- (6) General Management = 27%.

The findings of this study on Rwanda media business capacity building needs are detailed in the following table :

Figure 54: Skills needed to develop



According to responses above, journalists who did journalism in their studies are 55 out of 144 representing 39.3% and the total number of managers who did journalism represent 35.5%. The managers who learned business studies or management are only 22%. The lack of diversity in the skills of journalists affects the quality of content. A very low score of journalists who learned business before journalism means that the media sector will suffer from lack professional entrepreneurship. 5% of journalists are not enough to create professional media business content.

b) Additional skills to journalism

Even though there are still challenges to handle, there is a transformation, which is being made in media sector in Rwanda. Obviously, after several trainings, journalists are becoming

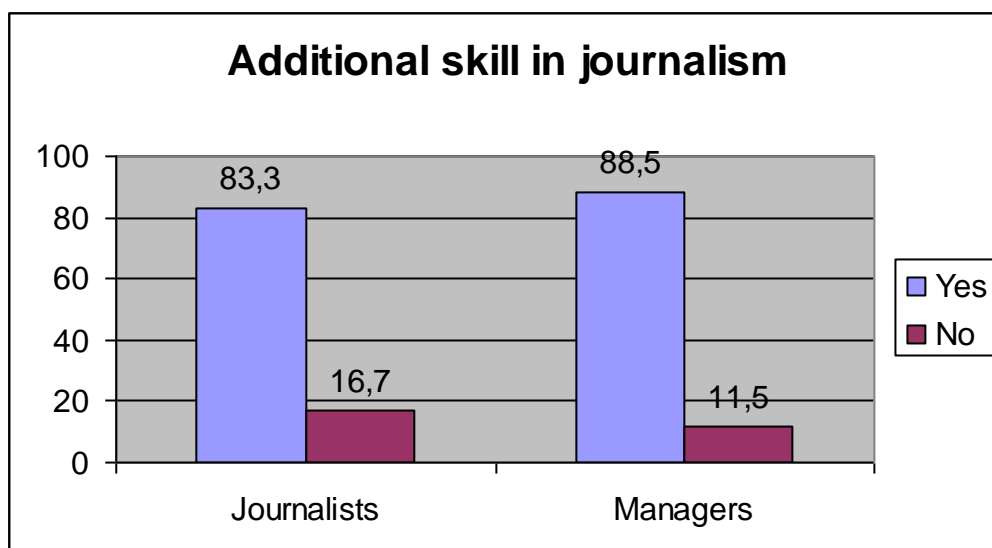
⁸⁵ Milne Claire et al. (2006) Media Management Training Needs Assessment for SADC countries

professionals. With the increased number of media training schools in Rwanda, the media sector has grown economically and socially

JUUKO ERNIS from Mount Kenya University said “The main transformation observed is the schools of journalism. The analytical journalism has to come on board to improve quality. The main challenges faced by the media sector in Rwanda are the language barrier, the international exposure, the limited media houses, and the lack of serious competition”.

Concerning the additional skills, journalists and managers may need more other skills than journalism and communication to increase their capacity vis-à-vis competitions. Moreover, media practitioners are media content producers the reason why they have to upgrade their critical skills, sense of news and searching abilities.

Figure 55: Proportion of respondents having additional skills in journalism



Concerning the journalists who received additional skills, 83.3% agreed that they have undergone trainings, 16.7 % said that they did not.

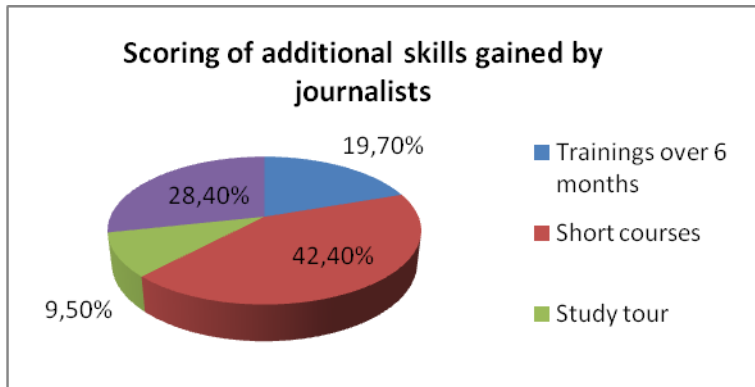
This number, however small it is, affects the quality of media business. Among the number of journalists who received these skills, 28.4% said that they trained themselves.

c) Types of trainings for additional skills

A number of training programs have been conducted for a large number of media professionals. However, participants in the focus workshop identified the need for structured training with the rigor of certification for meeting the goals of continuous effective training and leading to diplomas and improved career progression opportunities⁸⁶. For they benefited trainings like training over 6 months to be rewarded diploma, short terms courses, study tours and auto training on desk (on job trainings).

⁸⁶ 5 Years Capacity Capacity Building Plan for Media Sector 2013-2018

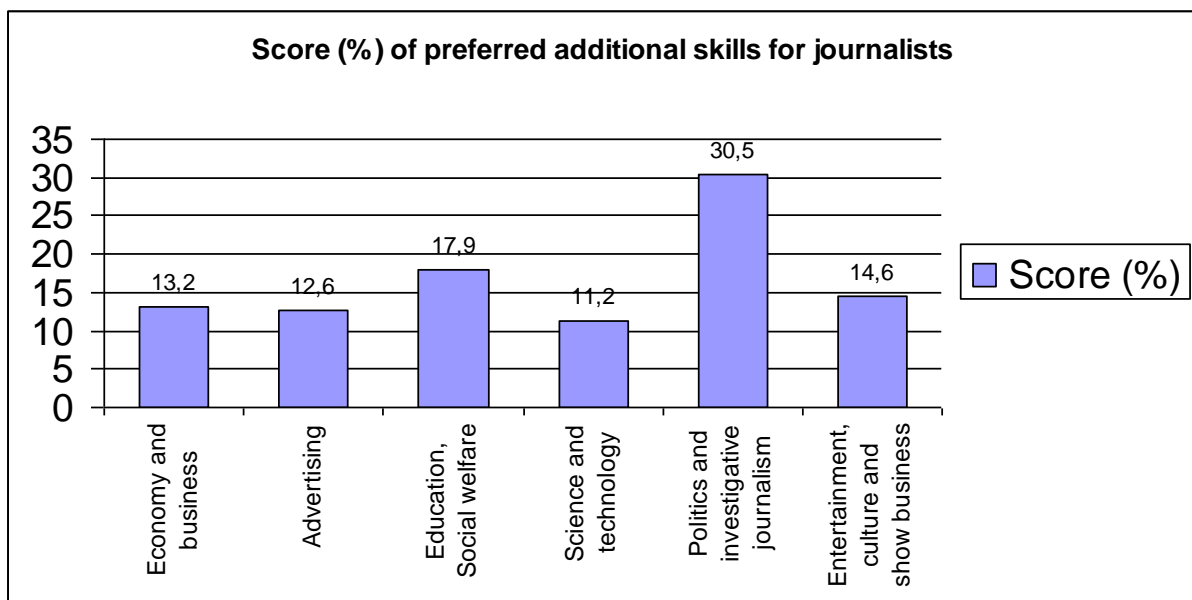
Figure 56: Additional skills gained by participants



The above information presented in figure indicates from where and how journalists and managers underwent trainings. A big number of journalists representing 42.4% benefited their trainings in short courses while still at their work. 28.4 % benefited them by training themselves. This case is similar to the one for managers representing 48.5% who did trainings by themselves. This is to mean that either managers or journalists have started their careers without being trained about what they are supposed to do, the reason why there is lack of quality in what they are supposed to do due to lack of professionalism.

A small number of journalists (19.7) and managers (9.1) only have received long-term trainings (of over 6 months). On the side of journalists went on preferences of additional skills as follows: economic and business, advertising, education, social welfare, science and technology, politics and investigative journalism, and entertainment, culture and show business. The following table indicates:

Figure 57: Score of field preferred for additional skills



As far as preferred fields for additional skills are concerned, journalists representing 30.5% affirmed that they wish to increase their capacities in politics and investigative journalism.

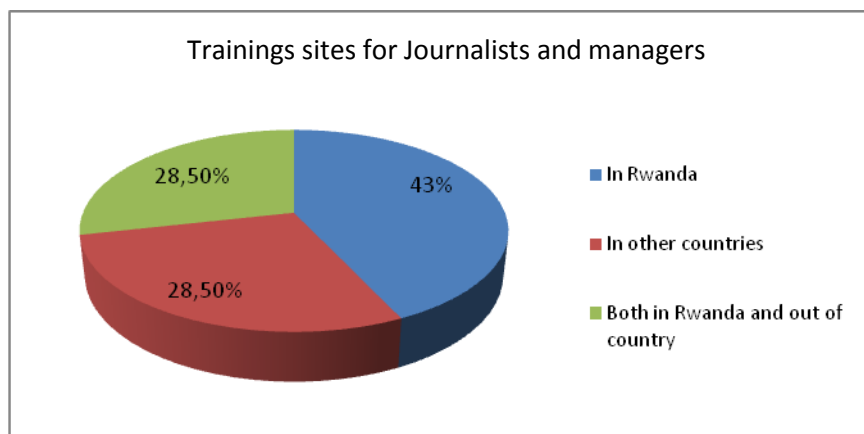
The Rwanda media sector, especially print media is accustomed to present politics and investigative news as the most attractive for readers commonly known as “BYACITSE” (hot news often on political and military wrangles).

The choice of this field of preferred additional skills is motivated by what exists now on the press market. This is a lack of innovative ideas as far as all of the newspapers target this subject. On the contrary, the small score (11%) is more interesting considering the needs of the people to know about science and technology. The development of the media sector must help to meet the country needs at every economic sector, to be understood by the public.

d) Training techniques (places and methods)

The government and its stakeholders do their best to provide much training in order to help journalists and media houses or, if possible invite experts from abroad for special trainings. Note that the trainings done in developed countries add a significant value. Different places were chosen by the media practitioners for conducting trainings such as in Rwanda, in other countries, and both in Rwanda and out of the Rwanda.

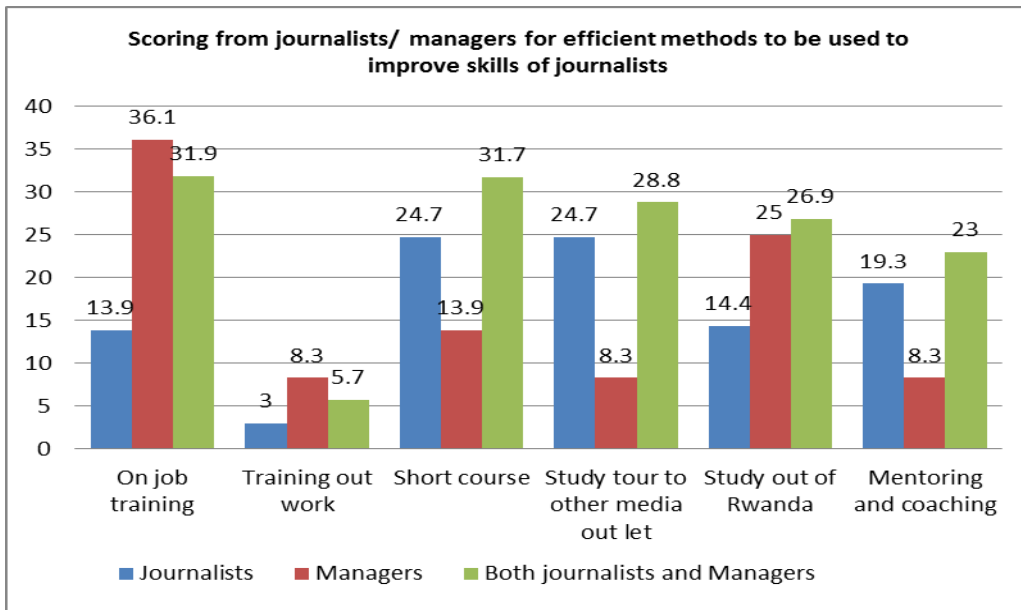
Figure 58: Training sites for journalists and managers



Concerning the places where journalists and managers received their trainings, a great majority of journalists and managers representing 43% have been trained only in Rwanda. Especially 71.9% of journalists who had additional trainings want to be trained within the country. The government must increase the opportunities for journalists to go abroad to increase their skills because there are some skills that can be acquired more from outside than in Rwanda. If journalists or managers benefited different types of training, they are competent on the labour market and the business outcome will be agreeable.

There are numerous methods and materials available to help journalist trainers prepare and equip employees and or journalists to better do their jobs. Indeed, with so many choices out there, it can be daunting to determine which methods to use and when to use them. In addition, using several methods for each training session may actually be the most effective way to help trainees learn and retain information. Some methods maybe for examples: Classroom or Instructor-Led Training, Case studies, on job training, training out work, short course, study tour, and mentoring and coaching. Then journalists, managers confirmed their preferences.

Figure 59: Efficient methods to be used in trainings



The 26.9% of journalists and managers who prefer to be trained abroad must be oriented in the fields that lack more personnel than the others in Rwanda. 36.1% of managers preferred on job trainings, 13.9% journalists preferring on job training compared to 24.7% preferring short-term courses, and 19.3% for mentoring and coaching. Depending on the types of training method, business is linked to profitable method in terms of time consuming, money required and nature of training and its conducting place.

f) Specialized areas to improve both print and broadcast media

Both print and broadcasting media, there are specific areas that need more attention like content production, editing, design, use of camera, presentation and reporting. Later aspects in media are being generally considered as basic requirements before starting journalism or communication. During the assessment, questions about those aspects were posed to journalists and managers.

Figure 60: Specialized areas to improve in print media segment

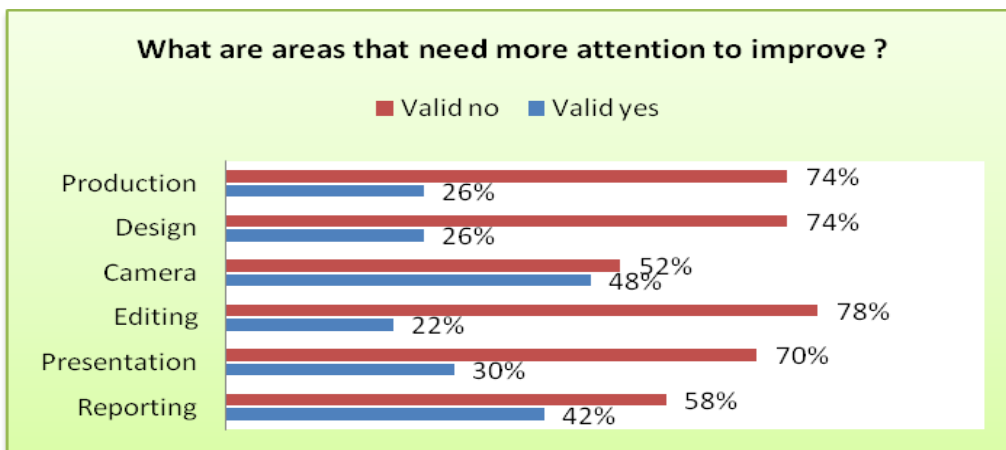
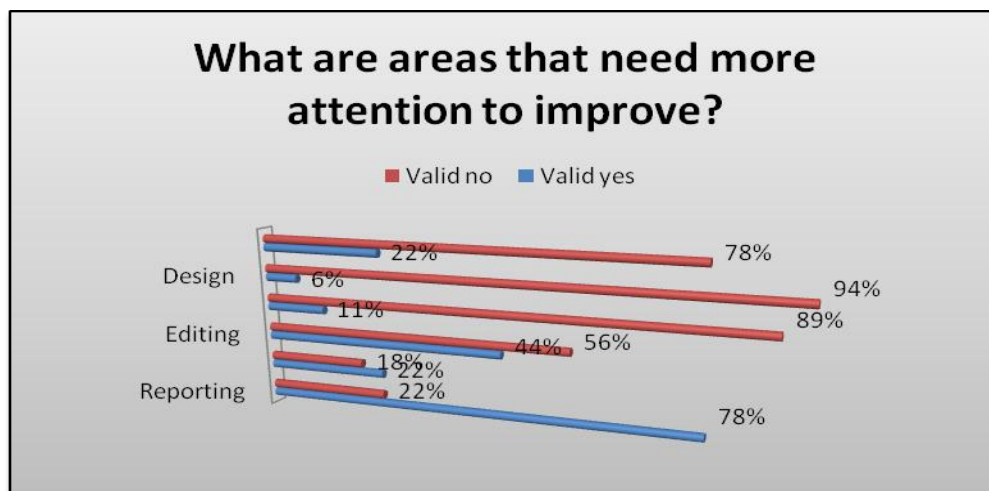


Figure 61: Specialized areas to improve in broadcast media segment



For broadcast media, the more needed areas to improve are reporting at 78%, editing at 44%, presentation at 22% and production at 22%. For print media the more needed areas to improve are camera at 48%, reporting at 42%, presentation at 30%, production and design at 26% and editing at 22%.

It also emerged from media practitioners (media managers) that people who study multimedia journalism are trained on out-of-date tools, for instance cameras. They claimed that most of them use big and old-fashioned cameras and do not know how to use interactive equipment such as smart phone and the ever-changing software that can enable journalists to report with immediacy. Some interviewees believe that this stems from the fact that most media trainers are either old and were trained on old techniques and equipment, but also there are no financial means to acquire cutting edge technologies. Skills are acutely lacking. For instance, the country now is on the move to adopt digital broadcasting, which requires enough content developers. However, it is important to highlight that these specialists are quite rare in the country. The use of ICT for media development in Rwanda encounters a number of bottlenecks including⁸⁷:

- Content generation
- New media audiences have a short attention span
- Ever changing media topography; paucity of relevant skills and experience
- Splintering/fragmented audiences
- Macro questions
- Legal/ethical
- Electricity
- Education
- Policy
- Market realities

⁸⁷ RMB Report 2013

g) Financial capacity of media outlets to pay for trainings

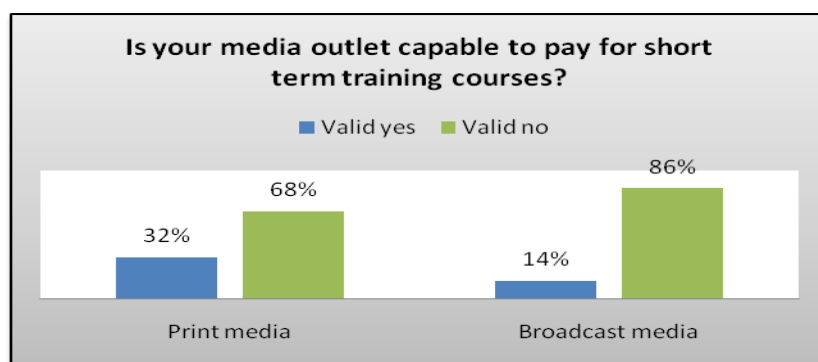
Business Management of Media – functions, processes, people, policies, etc that allow Individuals, Organisations and other stakeholders in the Environment involved in running Media as a business/commercial activity operate and deliver on its mandate.

But there is a significant lack of Media Business Management capacity and sustainability that is holding back the growth of this sector and rendering it less attractive to the best professional media practitioners and others who would like to diversify into this area.

Media owners were happy to start so easily their businesses in media sector but as the below findings confirm, there are so many capacity requirements to be considered when someone intends to be professional media business oriented.

The ability to pay salaries and to care of building capacity of the employees is one of the managerial competences. The following figure states the answers from print and broadcast managers

Figure 62: Financial capacity of media outlets to pay for trainings

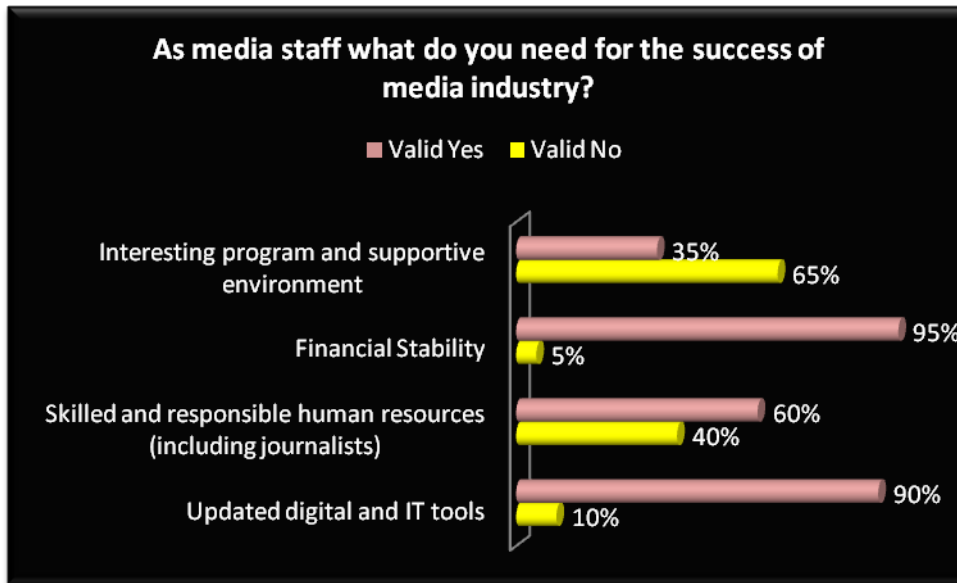


It illustrates that print media outlets are not able to pay for trainings of its staff at the level 68% and being able at the level of 32%. Of course, some of print media houses like New Times and Imvaho could pay for trainings of its staff. Broadcast media houses are able to pay fees for trainings at 14% level and not being able at the level of 86%. The partnership is still needed to raise capacities of media houses. Media houses themselves cannot solve this issue without support form MHC or any other person or organization for many media businesses are lagging behind years and years because of that barrier.

h) Expected needs of interests

Of cause, financial means are needed, but funds without professional skills are dangerous for sector and the country in general. Managers and journalists from print and broadcasting media expressed what they considered as important and or urgent needs for media sector among other many needs, the following had been selected: interesting program and supportive environment, financial stability, skilled and responsible human resources (including journalists) and use of updated digital and IT tools.

Figure 63: Expected needs to the success of media personnel



The 90% of media managers are in great need of updated digital and IT tools as means to successful working conditions. Financial stability comes at first place more needed than any other thing in media meaning that almost every media outlet in Rwanda searches for financial stability, interesting program and supportive environment needed at the level of 65% and 60% level of need of skilled and responsible human resources (including journalists).

i) The level of satisfaction

Today, the level of satisfaction of journalists in the media sector conditions of work is very low. Less than a half of our respondents are not happy of their income and their fragile work status.

Figure 64: Journalists’ level of satisfaction in media

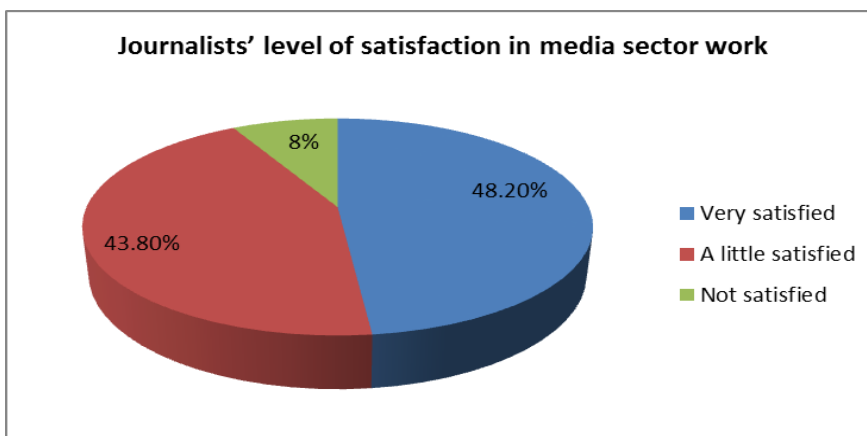
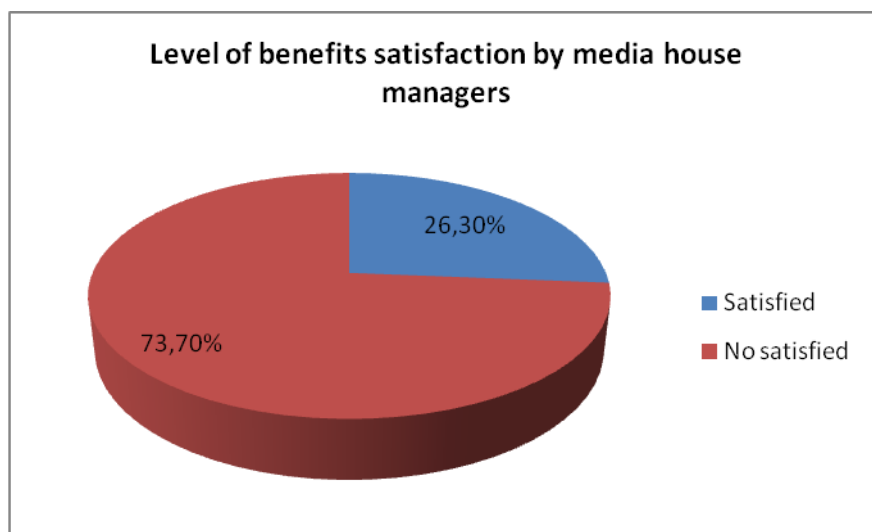


Figure 65: Media managers' level of satisfaction for media production



The managers are responsible of the good or bad health of their media companies. The level of satisfaction should be indexed as one of success indicators and declared each year beside the turnover rate, the salaries, the type and number of contracts. If the salary is over Rwf 100,000 and if a journalist has signed a contract, the situation should change positively. Even managers are not satisfied at all, with 73.7% of managers are not happy of the situation of their media houses.

CHAP 4: STRATEGIC RECOMMENDATIONS FOR MEDIA OUTLETS TO ACCESS FINANCES AND ACHIEVE ECONOMIC VIABILITY

Introduction

Based on the assessment findings and challenges already discussed above, the following recommendations were formulated to ensure effective sustainability of the achievements of media business management strategies and objectives. The following are to be addressed:

4.1 MEDIA SECTOR AND MEDIA PRACTITIONERS

1. The local content should be developed in all media. According to the local government Minister Hon. James MUSONI, “we need to tell our own story from our perspective in the fairest manner”. This is sustainable and potentially profitable because the local people might be willing to pay for content they relate with.⁸⁸;
2. To promote print and broadcast media for young people, children, pupils, students, etc. Community print media by subscriptions should be encouraged. The newspaper HOBE should be remade for current generations as it has been for the 1970’s;
3. Media managers and owners should avoid cannibal advertising, consider cultivating close relationships with the advertisers, without compromising on media independence and ethics, as a way of ensuring sustained revenues flows and profitability;
4. Media owners should endeavour to reinvest their earnings/profits in their staff to keep them motivated and enhance professionalism and subsequent profitability;
5. Though professionalism and profitability go together, the starting point should be professionalism. Professionalism helps media houses capture audiences, which in turn can attract external investment and eventually yield profitability;
6. Print media should consider also going online, to build readership, presence and compete on the online space;
7. Media should endeavour to first build the Brand, not the numbers. The newspaper circulation numbers are not necessarily an indicator of profitability. Media should focus on building strong brands as a prerequisite for achieving profitability. Charles Onyango-Obbo⁸⁹ emphasized the need for the local media to build their image. “It’s important to understand that you do not sell the circulation of a newspaper. You sell

⁸⁸ http://www.minaloc.gov.rw/index.php?id=469&tx_ttnews%5Btt_news%5D=328

⁸⁹ Charles Obbo is the Nation Media Group’s executive editor for Africa and digital media

the brand,” he said, advising local media to focus on defining what they stand for and keep their presence on the market;

8. Industry players should consider conducting collective/joint research studies to learn the market and understand audience and readership dynamics;
9. In the future, vertical growth of media through convergence and operational synergy is a viable way of ensuring long term profitability and survival of media enterprises in Rwanda;
10. Rwanda’s media organizations should move from homogeneous to differentiated products, to increase their profit potential. Relying on support for business sustainability is often short lived. Revenues should be earned; not granted;
11. Media practitioners should organize themselves and know where to tap the financial resources to fund such ventures; lenders need to ‘understand media industry specificities and consider these in making their lending terms more accommodative and less punitive for media sector. Lenders are interested in whether the media managers understand the environment, trends and have solid revenue generation plans to support loan repayments;
12. To promote the extension of the media distribution in provinces through partnership with the growing sector such as transport, telephone, banks, agriculture, etc.;
13. It was also recommended that media need to create distinction by avoiding duplication, most print media outlets in Rwanda are almost indistinguishable with the most copying the “perceived market leader” in total, there is great need for media outlets to segment their audience and or identify niches and strive to serve these niches;
14. Also the media outlets need to think out of the box literary and grow their audience, (this is more pressing for the print media); with more and better local content there is evident yearning for further and more comprehensive local coverage, media outlets need to increase their coverage of local events/news and content that resonates with the Rwandan public;
15. Managers request a wide range of management training such as formulating marketing strategies, preparing funding proposals, and basic financial management, including general human resource management, management styles, newsroom management, and staff support. Most media managers interviewed began their careers as journalists and worked their way up to management positions within their organizations. Their only recourse to knowing how media organizations should be run has been to follow the examples set by their predecessors. Because of this, media managers find themselves mimicking management styles that are often outdated and they are concerned that this limits their possibilities for effective action. Accordingly;
16. Managers feel that their knowledge of technology needs updating. They struggle to make decisions regarding technology because they lack the requisite information about available technology and the implications of new technology to their organizations. They also regard the move from analogue to digital broadcasting as a challenge;
17. On-the-job trainings are really needed to managers to diversify the content. The local content management helps the media to extend their coverage. The manager should learn how to methodically meet the needs of the customers;

18. To diversify the content and the target in accordance with preferences of different categories of the audience;
19. Consolidating efforts and resources to form trade union that may be the profitable way as well as building credibility vis-à-vis the financial sector and environment in general;
20. Media owners and managers should put an emphasis on building professionalism as core stone to increase the audiences as by then attract many advertisers, external investors and eventually yield profitability;
21. To enhance the role of media outlets in the country, it was recommended that media seriously invest in understanding the needs of the audience - understanding the audience is key to serving and fulfilling their needs, media outlets have to invest in learning who their audience is and what their preferences are (who & why). By so doing, media would clearly segment and serve identified niches. With diverse media needs and requirements, it is important for media outlets to determine which niche it wants to occupy and serve- who it wants to target;
22. As pointed out M Kabagambe Ignatius, “RBA needs to be at the forefront, more interactive with its audiences, and with enhanced capacity to produce quality information through multimedia channels”⁹⁰. Some of the new initiatives that RBA could embark on to generate more revenue, would be through advertising, more newspaper sales in the region, transmitter rental, commercial printing, production of local programs, charging of nominal fees to access TV online and equipment hire;
23. A Broadcasting Fund that would be funded through contributions and levies from the electronic media could assist in the development of the industry.

a) Policy makers

1. To put in place strategic orientations by which the culture of reading might be reinforced by means of media literacy programs. MHC should produce series of TV and Radio advertising calling people to read more and more newspapers as well as books, correspondence, etc. The culture of reading promoted as a development step ;
2. The annual budget must clearly indicate the amount allocated to the media sector for the interest of freedom expression and right to information, education and entertainment of the citizen. The media sector either is private or publicly owned, local or international, print or broadcast should be a shareholder of the governmental development plan and even stakeholder in public planning processes;
3. Government should spread their advert spending to both private and public media outlets. If government adverts go to the public media, these outlets will stifle private media houses.
4. To genuinely control over the move into digital broadcasting, public broadcaster, privatization of the printer and vast opportunities in content production and distribution add to the industry’s attractiveness;

⁹⁰ *The call was made by the then Director General in the Ministry of Information, Ignatius Kabagambe, during a meeting to validate the organisation’s five-year business and strategic plan.*

4.2 MEDIA TRAINING INSTITUTIONS

1. To focus on the dynamics of today's media environment and the ways in which technological change is both disrupting traditional strategic approaches and introducing new strategic opportunities;
2. To teach the basics of entrepreneurship, with an emphasis on the specialized context of the media and information sectors;
3. To teach Fundamentals of clear and effective communication and presentation of ideas and proposals to relevant stakeholders and potential investors;
4. To conduct hands-on training and feedback in the development of new media enterprises.
5. Media training institutions should increase number of trainees who might be interesting in doing business in the media sector;

4.3 MEDIA DEVELOPMENT PARTNERS

1. It should be relevant to form a mechanism desk that join together the members of Private Sector Federation and media business owners and managers with purposes of selling the role of media in business growth in Rwanda;
2. Investors and other media development partners should take advantages of factors that favor the digital revolution include but are not limited to the following:
 - Economic growth: this is the key to digital TV migration. Rwanda is on a good economic growth path, therefore, promotes a good environment for TV broadcasting;
 - Political stability: From an uncertain period of war, Rwanda is a huge success in the way bad politics can be turned into good politics for progress;
 - Independent licensing and regulating authority is now in place;
 - Vision 2020 (i.e. EDPRS II), media policy and regulation bodies that balance an entrepreneurial spirit and the public interest (e.g.: use of languages, children's programming, news etc)
 - TV households are increasing: Percentage of TVs in households to the number of households (TV penetration)
 - Advertising and sponsorship market is available

4.4 MEDIA HIGH COUNCIL (MHC)

1. To conduct regular evidence based seminar workshops on content management and regular statistics of media performance. The main purpose of that regular meeting should be to motivate media practitioners and present the opportunities to investors;
2. As shown by the findings, at least 48.2% and 43.8% of journalists are in the range of [1-100,000] & [101,000-200,000] and claiming none or little satisfaction. However

only 8% proved their satisfaction. So MHC should ensure advocacy programs for it is hindering sector business growth while inflation becomes higher and higher on the service and goods' market in Rwanda;

3. The Media High Council should conduct regular research to showcase the media company performances and widely publish them. The individual efforts of managers are required to make good statistics to enhance the growth of sector. Techniques of audience and readership measurement must be set in place.
4. To advocate for the promotion of other infrastructures like telecenters (public television for villagers), kiosks and mobile buses which has no doubt boasted internet usage to more than 12% and enhanced public access to information. Indeed online publishing and advertising as well as the use of new media platforms is increasing by the day hence slowly threatening the survival of mainstream media;
5. It was recommended from the 3rd National Media dialogue was that Rwanda needs to maximize on the excellent ICT infrastructural framework⁹¹ to invest and reap benefits from the new media, digital broadcasting, content generation, etc by doing the following:
 - Diversifying sources of media funding to develop the media;
 - Capacity building targeting new media skills—for content development, ICT infrastructure management, social media, etc;
 - Promoting media operational synergy to take advantage of economies of scale;
 - Promoting private-public media partnerships especially regionally and internationally;
 - Taking full advantage of the benefits of Digital Broadcasting technology but, at the same time, ensuring that the right infrastructure is well set and accessible to the majority of the population.
6. Data available from the MHC indicate that only 30% of practicing journalists have been trained in journalism, meaning that very few media professionals have formal educational or professional media skill/competencies. These numbers show that the gap is still too high for the media to deliver quality services that meet public expectations. MHC is still required to increase percentage of trainees in journalism;
7. To establish and Implement 'learning by doing' programs and online training, facilitated by a pool of mentors and coaches to raise quality service and help develop higher standards of ethics;
8. To take full advantage of ICT tools in reducing international imbalances affecting the Media, particularly as regards infrastructure, technical resources and the development of human skills;
9. To facilitate the establishment of partnerships and networks between media professionals in Rwanda and those in the region and developed countries to enhance skills development;

⁹¹ According to the then Minister of ICT in the President's Office, Dr. Ignace Gatware, Rwanda envisions an information-rich knowledge-based society by 2020.

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10. To establish and Implement viable mechanisms to facilitate the flow of local informational, educational and entertainment content through the media, particularly in rural areas;
11. To establish processes for achievement of social security for Journalists/media practitioners as well as remuneration that is proportional to their social role and guarantee of their economic independence;
12. To establish and Implement a resource mobilization strategy to gather resources to support capacity building projects for the media sector;
13. To facilitate the creation of cooperatives for small and growing media organizations;
14. To support small and young consolidated media organizations with subsidies to sustain their growth and enhance responsible journalism;
15. To establish a grant making mechanism through which journalists and media institutions are funded to conduct social interest journalism;
16. To initiate audience research projects and surveys informing the performance of media.

CONCLUSION

The Rwanda media sector can recover if many studies conducted by Media High Council and their several recommendations are implemented. They are so many and complementary but the result is not yet verifiable in the Rwandan society. We have been challenged by this problem, which lead many experts and institution representatives to not cooperate with our data collectors. That is why we preferred to mention the previous recommendation in addition on this study. The anger of journalists who participate in our discussion forum group revealed a media sector dangerously ill. They affirm contrastively that the Government is supportive in media capacity building but not financially supportive to private sector.

We tried to show the importance of the capacity-building program to journalism and to managers, which can ipso facto generate income and financial sustainability themselves. Some do not believe because the advertising factor has become the pretext of poorness or success in media sector. Despite a government representative has declared that there is no law which obliges public institutions not to advertise in a private media, journalists talk about the bad habits, the fear of the high authorities if they advertise in a private media. That is why we recommended practicing a push marketing by private media to public institutions.

With digitalization, the tools for audience measurement of broadcast media, which will contribute to inform advertisers on media performance, will occur in the sector. Professionalism will enhance business and business management take in account the capacity building plan.

This study will help managers to decide if they like to run their media as a business corporation or continue in the traditional way. There are four steps and indicators to follow:

- to register the media as a business company in RDB and reinforce their marketing strategies
- to declare every year the statistics including (audiences, number of printed copies, rate of advertising, turnover, employees)
- to observe a media management sustainability, following the IREX indicators⁹² :
 - Media outlets operate as efficient and self-sustaining enterprises.
 - Media receive revenue from a multitude of sources.
 - Advertising agencies and related industries support an advertising market.
 - Advertising revenue as a percentage of total revenue is in line with accepted standards.
 - Government subsidies and advertising are distributed fairly, governed by law, and neither subvert editorial independence nor distort the market.
 - Market research is used to formulate strategic plans, enhance advertising revenue, and tailor the product to the needs and interests of the audience.

⁹² <http://www.irex.org/resource/media-sustainability-index-msi-methodology>

- Broadcast ratings, circulation figures, and Internet statistics are reliably and independently produced.

- To observe the following journalism professional standards of quality under the control of the Rwanda Media Commission (RMC) and Media High Council (MHC):
 - Reporting should be fair, objective, and well sourced,
 - Journalists should follow recognized and acceptable ethical standards,
 - Journalists and editors do not practice self-censorship,
 - Journalists cover key events and issues,
 - Pay levels for journalists and other media professionals are sufficiently high to discourage corruption,
 - Advertisement programming does not eclipse news and information programming.
 - Technical facilities and equipment for gathering, producing, and distributing news are modern and efficient,
 - Quality niche reporting and programming exists (investigative, economics/business, local, political).

We hope the program of educating general population for an increasing culture of reading will meet the interest of the government. It is very urgent to start that program for a very long-term objective.

The media sector in Rwanda as in Africa is full of opportunities. The Media High Council is invited to cooperate with the Private Federation Sector in teaching to journalists and Managers how to innovate and to improve the economic situation of journalists. If necessary, some specialization Masters in Media Management can be planned each year, which would change the face of the media sector.

The Private sector and the media investors welcomed this sector in a new competitive economy where they can win many market shares.

The distribution of the print media in all the sectors of the country and the promotion of a public TV in each electrified village should create a lot of jobs, a serious income for the media houses and the country.

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APPENDIX I : IMPLEMENTATION MATRIX OF RECOMMENDATIONS FOR CAPACITY BUILDING OF MEDIA BUSINESS MANAGEMENT

| CATEGORY | RECOMMENDATION | STRATEGY | STRATEGIC ACTION TO TAKE | OUTCOME | INDICATOR-OUTPUT/TARGET GROUP | TIMEFRAME | BUDGET | RESPONSIBLE |
|---|---|--|--|---|---|-----------|------------|---|
| MEDIA SECTOR AND MEDIA PRACTITIONERS | The local content should be developed in all media. According to the local government minister Hon. James MUSONI, “we need to tell our own story from our perspective in the fairest manner”. This is sustainable and potentially profitable because the local people might be willing to pay for content they relate with. ⁹³ ; | Set up local content management desk or mechanism; Train journalists for local content collection, analysis and editing | Doing advocacy to set up desk Mobilize funds to train journalists | Local information shared accordingly and professionally | The number of trained journalists, the increased percentage of local content in media | 2014-15 | 15,000 USD | MHC, ARJ, Media owners and managers |
| | To promote the print and broadcast media for young people, children, pupils, students, etc. The community print media by subscriptions. The newspaper HOBE should be remade for current generations as it has been for the 1970’s; | Promotion of specialisation of children related courses and youth in general | Training journalists and even new interested people Who want to become journalists; Reinforcing media clubs in | Stories about children increased and media houses prospered | The increased percentage of child related stories in media Increased number of media clubs (youth, pupils, students) | 2014-15 | 10,000 USD | MHC, ARJ, NCC, ARFEM, Media owners and managers |

⁹³ http://www.minaloc.gov.rw/index.php?id=469&tx_ttnews%5Btt_news%5D=328

Media business growth and transformational challenges with capacity building needs assessment

| CATEGORY | RECOMMENDATION | STRATEGY | STRATEGIC ACTION TO TAKE | OUTCOME | INDICATOR-OUTPUT/TARGET GROUP | TIMEFRAME | BUDGET | RESPONSIBLE |
|----------|---|---|---|---------------------------------------|---|-----------|-------------|--|
| | | | schools | | | | | |
| | <p>Media managers and owners should avoid cannibal advertising: consider cultivating close relationships with the advertisers, without compromising on media independence and ethics, as a way of ensuring sustained revenues flows and profitability;</p> <p>Media owners should endeavor to reinvest their earnings/profits in their staff to keep them motivated and enhance professionalism and subsequent profitability;</p> | Strengthening working on business plan and marketing strategies | Putting in place a clear selling strategy and backing with independence and professional working measures | Media business flourished | Increased percentage of adverts | 2014-15 | - | Media houses owners and managers and media house personnel |
| | <p>Though professionalism and profitability go together, the starting point should be professionalism. Professionalism helps media houses capture audiences, which in turn can attract external investment and eventually yield profitability;</p> | Conduct trainings | Availing of training modules and trainers | An increased level of professionalism | Percentage of trainees at the end of trainings, the target group should be journalists, accountants and marketing officers and managers of radios, TV and print media including online websites | 2014-015 | 100.000 USD | MHC , NUR, and media managers |
| | Print media should consider also going online, to build | Conduct trainings and | Availing of training | An increased level of | Percentage of trainees at the | 2014-2015 | 100.000 USD | MHC , NUR, and media |

Media business growth and transformational challenges with capacity building needs assessment

| CATEGORY | RECOMMENDATION | STRATEGY | STRATEGIC ACTION TO TAKE | OUTCOME | INDICATOR-OUTPUT/TARGET GROUP | TIMEFRAME | BUDGET | RESPONSIBLE |
|----------|---|--|--|--|---|-----------|-------------|--|
| | readership, presence and compete on the online space; | providing facilitations | modules and trainers | professionalism | end of trainings, the target group should be journalists, accountants and marketing officers and managers of radios, TV and print media including online websites | | | managers |
| | Media should endeavor to first build the Brand, not the numbers. The newspaper circulation numbers are not necessarily an indicator of profitability. Media should focus on building strong brands as a prerequisite for achieving profitability; | Establish and facilitate media trade union | Engaging on table private sector, RDB, and media outlets' owners | Market of information became widened and media sector turn to financial and economic stability | Established one trade union for online-broadcasting-print media Target people: media practitioners | 2015-2016 | 150.000 USD | MHC, RGB, media associations and media practitioners |
| | Industry players should consider conducting collective/joint research studies to learn the market and understand audience and readership dynamics; In the future, vertical growth of media through convergence and operational synergy is a viable way of ensuring long term | Establish information sharing desk | Engaging on table media producers, journalists, editors and managers | Local content developed in media | Established one local information desk Target people: media practitioners | 2015-2016 | 50.000 uSD | MHC, media associations, RMC and media practitioners |

Media business growth and transformational challenges with capacity building needs assessment

| CATEGORY | RECOMMENDATION | STRATEGY | STRATEGIC ACTION TO TAKE | OUTCOME | INDICATOR-OUTPUT/TARGET GROUP | TIMEFRAME | BUDGET | RESPONSIBLE |
|----------|--|--|--|---------------------------------------|--|-----------|------------|--|
| | profitability and survival of media enterprises in Rwanda; | | | | | | | |
| | Rwanda's media organizations should move from homogeneous to differentiated products, so as to increase their profit potential. Relying on support for business sustainability is often short lived. Revenues should be earned; not granted; | Establish information sharing desk | Engaging on table media producers, journalists, editors and managers | Local content developed in media | Established one local information desk Target people: media practitioners | 2015-2016 | 50.000 uSD | MHC, media associations, RMC and media practitioners |
| | Media practitioners should organize themselves and know where to tap the financial resources to fund such ventures; lenders need to 'understand media industry specificities and consider these in making their lending terms more accommodative and less punitive for media sector. Lenders are interested in whether the media managers understand the environment, trends and have solid revenue generation plans to support loan repayments; | Engage and liaise media managers and development partners (ONE-UN WOMEN, UN DP, DFID,.) banks (BNR, BRD, BK, BCR,) | Conduct forums per category of media outlets | Relevant journalistic projects funded | Number of funded projects annually | 2015-2016 | 25.000 USD | MHC and RMC |

Media business growth and transformational challenges with capacity building needs assessment

| CATEGORY | RECOMMENDATION | STRATEGY | STRATEGIC ACTION TO TAKE | OUTCOME | INDICATOR-OUTPUT/TARGET GROUP | TIMEFRAME | BUDGET | RESPONSIBLE |
|----------|---|--|---|---|--|-----------|-------------|---|
| | To promote the extension of the media distribution in provinces through partnership with the growing sector such as transport, telephone, banks, agriculture, etc.; | Install an Information selling platform including several common services in population's every day life | Facilitate the design of mutual contract prototype between the selling platform and media outlets and other participants. | Shared market of public communications and private media sector became profitable | Number of designed contract prototypes 161 selling points in Kigali and one per sector throughout the country (total of 500 at least) | 2014-2015 | 500.000U SD | MHC, RGB, RMC and media practitioners, Ministry of Local Administration, Ministry of Commerce |
| | It was also recommended that media need to create distinction by avoiding duplication, most print media outlets in Rwanda are almost indistinguishable with the most copying the "perceived market leader" in total, there is great need for media outlets to segment their audience and or identify niches and strive to serve these niches; | Establish information sharing desk | Engaging on table media producers, journalists, editors and managers | Local content developed in media | Established one local information desk Target people: media practitioners | 2015-2016 | 50.000 uSD | MHC, media associations, RMC and media practitioners |

Media business growth and transformational challenges with capacity building needs assessment

| CATEGORY | RECOMMENDATION | STRATEGY | STRATEGIC ACTION TO TAKE | OUTCOME | INDICATOR-OUTPUT/TARGET GROUP | TIMEFRAME | BUDGET | RESPONSIBLE |
|-----------------|--|---|---|---|---|------------------|---------------|-------------------------------|
| | Also the media outlets needed to think out-of-the-box literary and grow their audience, (this is more pressing for the print media); with more and better local content -there is evident yearning for further and more comprehensive local coverage, media outlets need to increase their coverage of local events/news and content that resonates with the Rwandan public; | Think out-of-the-box literary and grow the audience | Conduct audience survey | Media coverage concentration in Rwanda is known | Adopted findings of the survey | 2014-2015 | 150.000 uSD | MHC |
| | Managers request a wide range of management training such as formulating marketing strategies, preparing funding proposals, and basic financial management, including general human resource management, management styles, newsroom management, and staff | Conduct trainings on leadership and management of business media houses | Availing of training modules and trainers | An increased level of professionalism | Percentage of trainees at the end of trainings, the target group should be journalists, accountants and marketing officers and managers of radios, TV and print media | 2014-015 | 100.000 USD | MHC , NUR, and media managers |

Media business growth and transformational challenges with capacity building needs assessment

| CATEGORY | RECOMMENDATION | STRATEGY | STRATEGIC ACTION TO TAKE | OUTCOME | INDICATOR-OUTPUT/TARGET GROUP | TIMEFRAME | BUDGET | RESPONSIBLE |
|----------|---|------------------------------|---|---------------------------------------|---|-----------|-------------|----------------------------------|
| | support; | | | | including online websites | | | |
| | Managers feel that their knowledge of technology needs updating. They struggle to make decisions regarding technology because they lack the requisite information about available technology and the implications of new technology to their organizations. They also regard the move from analogue to digital broadcasting as a challenge; | Conduct trainings on ICTs | Availing of training modules and trainers | An increased level of professionalism | Percentage of trainees at the end of trainings, the target group should be journalists, accountants and marketing officers and managers of radios, TV and print media including online websites | 2014-015 | 100.000 USD | MHC , NUR, and media managers |
| | On job trainings are really needed to managers so as to diversify the content is a managerial obligation. The local content management helps the media to extend their coverage. The manager should learn how to methodically meet the needs of the customers; | Conduct on job trainings | Availing of training modules and trainers | An increased level of professionalism | Percentage of trainees at the end of trainings, the target group should be journalists, accountants and marketing officers and managers of radios, TV and print media including online websites | 2014-015 | 100.000 USD | MHC , NUR, and media managers |
| | Consolidating efforts and resources to form trade union that may be the profitable | Facilitate media managers to | Engaging on table private sector, RDB, | Market of information became | Established one trade union for online- | 2015-2016 | 150.000 USD | MHC, RGB, media associations and |

Media business growth and transformational challenges with capacity building needs assessment

| CATEGORY | RECOMMENDATION | STRATEGY | STRATEGIC ACTION TO TAKE | OUTCOME | INDICATOR-OUTPUT/TARGET GROUP | TIMEFRAME | BUDGET | RESPONSIBLE |
|----------|--|--|--|---|--|-----------|------------|--|
| | way as well as building credibility vis-à-vis the financial sector and environment in general; | form trade union | and media outlets' owners | widened and media sector turn to financial and economic stability | broadcasting-print media Target people: media practitioners | | | media practitioners |
| | Media owners and managers should put an emphasis on building professionalism as core stone to increase the audiences as by then attract many advertisers, external investors and eventually yield profitability; | Conduct forums between media owners, managers and media buyers | Call upon and interesting media owners, managers and media buyers to be part of forums | Relevant advices and recommendations executed | Set of recommendation considered | 2014-2015 | 50.000 USD | MHC, RMC and media owners and managers |
| | To diversify the content and the target in accordance with preferences of different categories of the audience; | Engage broadcast and mainstreamed media to work genuinely to its audience needs. | Put in place guidelines on Rwandan audience preferences | Guidelines available | Number of guidelines booklets available and disseminated | 2015-2016 | 15.000 USD | MHC and media owners and managers |
| | To enhance the role of media outlets in the country, it was recommended that media seriously invest in understanding the needs of the audience - understanding the audience is key to serving and fulfilling their needs, media outlets have to invest in learning who their | Engage broadcast and mainstreamed media to work genuinely to its audience needs. | Put in place guidelines on Rwandan audience preferences | Guidelines available | Number of guidelines booklets available and disseminated | 2015-2016 | 15.000 USD | MHC and media owners and managers |

Media business growth and transformational challenges with capacity building needs assessment

| CATEGORY | RECOMMENDATION | STRATEGY | STRATEGIC ACTION TO TAKE | OUTCOME | INDICATOR-OUTPUT/TARGET GROUP | TIMEFRAME | BUDGET | RESPONSIBLE |
|----------------------|---|--|--|--|---|-----------|-------------|------------------|
| | audience is and what their preference are (who & why). By so doing, media would clearly segment and serve identified niches. With diverse media needs and requirements, it is important for media outlets to determine which niche it wants to occupy and serve- who it wants to target | | | | | | | |
| | RBA needs to be at the forefront, more interactive with its audiences, and with enhanced capacity to produce quality information through multi-media channels. | Reveal successes and failures of trading digital products in Rwanda case study of RBA and TV10 | Advertising, more newspaper sales in the region, transmitter rental, commercial printing, production of local programs, charging of nominal fees to access TV online and equipment hire. | Media selling success and failures in Rwanda are known | Adopted findings of the survey | 2015-2016 | 300.000 uSD | MHC |
| | | | | | | | | |
| POLICY MAKERS | To put in place strategic orientations by which the culture of reading might be reinforced by means of media | Carry out media literacy programs | Write down media orientation material for reading | Culture of reading and listening media products | Increased percentage level of reading and listening | 2015-2016 | 200.000 USD | MHC and partners |

Media business growth and transformational challenges with capacity building needs assessment

| CATEGORY | RECOMMENDATION | STRATEGY | STRATEGIC ACTION TO TAKE | OUTCOME | INDICATOR-OUTPUT/TARGET GROUP | TIMEFRAME | BUDGET | RESPONSIBLE |
|----------|---|--|--|---|--|-----------|-----------|---------------------------------------|
| | literacy programs; | | Newspapers for children Conduct awareness campaign to raise issue of reading and listening media products | enhanced | | | | |
| | The annual budget must clearly indicate the amount allocated to the media sector for the interest of expression freedom and right to information, education and entertainment of the citizen. The media sector either is private or publicly owned, local or international print or broadcast should be a shareholder of the governmental development plan and even stakeholder in public planning processes; | Engage and liaise media managers and central and local governments | Facilitate the design of mutual contract prototype between media outlets and government institutions and local government. | Shared market of public communications and private media sector became profitable | Number of designed contract prototypes | 2014-2015 | 20.000USD | MHC, RGB, RMC and media practitioners |
| | Government should spread their advert spending to both private and public media outlets. If government adverts go to the public media, these outlets will stifle private media houses. On the other | Engage and liaise media managers and central and local governments | Facilitate the design of mutual contract prototype between media outlets and government | Shared market of public communications and private media sector | Number of designed contract prototypes | 2014-2015 | 20.000USD | MHC, RGB, RMC and media practitioners |

Media business growth and transformational challenges with capacity building needs assessment

| CATEGORY | RECOMMENDATION | STRATEGY | STRATEGIC ACTION TO TAKE | OUTCOME | INDICATOR-OUTPUT/TARGET GROUP | TIMEFRAME | BUDGET | RESPONSIBLE |
|-----------------|--|--|------------------------------------|--------------------------------------|--------------------------------------|------------------|---------------|--------------------|
| | hand, media houses should accept the reality that if they are hard-hitting to authorities, they will get no business from government spending; | | institutions and local government. | became profitable | | | | |
| | To genuinely control over the move into digital broadcasting, public broadcaster, privatization of the printer and vast opportunities in content production and distribution add to the industry's attractiveness; | Carry out an impact assessment of privatization of the printer and vast opportunities in content production and distribution | Conduct research | Positive or negative impact is known | Adopted findings of the survey | 2015-2016 | 250.000 uSD | MHC |

Media business growth and transformational challenges with capacity building needs assessment

| MEDIA TRAINING INSTITUTIONS | <ul style="list-style-type: none"> It is recommended that Media Training Institutions should focus on the following areas: <ul style="list-style-type: none"> The dynamics of today's media environment and the ways in which technological change is both disrupting traditional strategic approaches and introducing new strategic opportunities; The basics of entrepreneurship, with an emphasis on the specialized context of the media and information sectors; Fundamentals of clear and effective communication and presentation of ideas and proposals to relevant stakeholders; Hands-on training and feedback in the development of new media enterprises. | Carry an assessment to review training curriculum | Conduct research | Weaknesses and successes of existing academic media programs known and addressed to concerned institutions | Adopted findings of the survey | 2015-2016 | 250.000 USD | MHC |
|------------------------------------|---|---|--|--|--------------------------------------|-----------|-------------|---|
| | Media training institutions should increase number of trainees who might be interesting in doing business in the media sector | Engagement of MHC with training institutions | Bring them on board in a consultative meeting | Recommendations addressed to concerned institutions | Number of recommendation considered | 2015-2016 | 10.000 USD | MHC and training institutions |
| | | | | | | | | |
| MEDIA DEVELOPMENT PARTNERS | It should be relevant to form a mechanism desk that join together the members of Private Sector Federation and media business owners and managers with purposes of selling the role of media in business growth in Rwanda | Establish joint mechanism between media and private sector federation | Engage partners, media owners, and private sector members and establish joint mechanism for advertisement. | Private sector members knew importance of media through advertisement | Increased number of adverts in media | 2014-2015 | 45.000 USD | MHC, media owners and private sector federation |

Media business growth and transformational challenges with capacity building needs assessment

| MHC | To conduct regular evidence based seminar workshops on business content in media. The main purpose of that regular meeting should be to comment on the errors and the opportunities in the business content production | Conduct workshops, forums and seminars | Call upon and interesting media owners, managers and media buyers to be part of forums | Relevant advices and recommendations executed | Set of recommendations considered Target group: media practitioners and buyers | 2014-2015 | 50.000 USD | MHC and media owners and managers |
|------------|---|---|--|---|---|-----------|------------|--|
| | As shown by the findings at least 48.2% and 43.8% of journalists are in the range of [1-100,000] & [101,000-200,000] and claiming none or little satisfaction. However only 8% proved their satisfaction. So MHC should conduct advocacy programs for it is hindering sector business growth while inflation becomes higher and higher on the service and goods 'market in Rwanda | Carry out an advocacy program | Constitute and implement an advocacy roadmap and program | Problematic agenda of salary in media houses finished | 10% increased level of salary in media houses | 2014-2015 | 5.000 USD | MHC and media owners and managers |
| | The Media High Council should create a web site to regularly indicate the media companies performances. The individual efforts of managers are required to make good statistics to generally enhance the growth of sector | Put in place a common website that joint together all small media outlets especially newspapers | Construct a common website | All small newspapers gathered its information, profits and shared audience-visitors | Number of small newspapers engaged | 2015-2016 | 15.000 USD | MHC, identified small newspapers and RMC |
| | To do advocacy for promotion of other infrastructures like tele-centers, kiosks and mobile buses which has no doubt boasted internet usage to more than 12% and enhanced public access to information. Indeed online publishing and advertising as well as the use of new media platforms is increasing by the day hence slowly threatening the survival of mainstream media | Carry out an advocacy program | Constitute and implement an advocacy roadmap and program | Problematic agenda of salary in media houses finished | 10% increased level of salary in media houses | 2014-2015 | 5.000 USD | MHC and media owners and managers |

Media business growth and transformational challenges with capacity building needs assessment

| | | | | | | | | |
|--|---|---|--|---|---|-----------|-------------|------------------------------|
| | <ul style="list-style-type: none"> • It was recommended from the 3rd National Media dialogue was that Rwanda needs to maximize on the excellent ICT infrastructural framework⁹⁴ to invest and reap benefits from the new media, digital broadcasting, content generation, etc by doing the following: <ul style="list-style-type: none"> • Diversifying sources of media funding to develop the media • Capacity building targeting new media skills – for content development, ICT infrastructure management, social media, etc • Promoting media operational synergy to take advantage of economies of scale • Promoting private-public media partnerships especially regionally and internationally • Taking full advantage of the benefits of Digital Broadcasting technology but at the same time ensuring that the right infrastructure is well set and accessible to the majority population. | Conduct trainings and forums | Availing of training modules and trainers | An increased level of professionalism | Percentage of trainees at the end of trainings, the target group should be journalists, accountants and marketing officers and managers of radios, TV and print media including online websites | 2014-015 | 100.000 USD | MHC, NUR, and media managers |
| | Data available from the MHC indicate that only 30% of practicing journalists are trained in journalism meaning that very few media professionals have formal educational or professional media skill/ competency training. These numbers show that the gap is still too | Construct fully databank upon all media outlets operating in Rwanda and make it online. | Carry out enumeration research from all media houses | Media sector became informative and source of other development | All media related data to inform sector and partners availed | 2014-2015 | 50.000 USD | MHC |

⁹⁴ According to the then Minister of ICT in the President’s Office, Dr. Ignace Gatara, Rwanda envisions an information-rich knowledge-based society by 2020.

Media business growth and transformational challenges with capacity building needs assessment

| | | | | | | | | |
|--|--|--|---|---------------------------------------|---|-----------|-------------|-----------------------------------|
| | high for the media to deliver quality services that meet public expectations. MHC is still required to increase percentage of trainees in journalism | | | sectors | | | | |
| | To establish and Implement ‘learning by doing’ programs and online training, facilitated by a pool of mentors and coaches to raise quality service and help develop higher standards of ethics | Establish and Implement ‘learning by doing’ programs and online training | Availing of training modules and trainers | An increased level of professionalism | Percentage of trainees at the end of trainings, the target group should be journalists, accountants and marketing officers and managers of radios, TV and print media including online websites | 2014-015 | 115.000 USD | MHC, NUR, and media managers |
| | To take full advantage of ICT tools in reducing international imbalances affecting the Media, particularly as regards infrastructure, technical resources and the development of human skills | Establish and Implement ‘learning by doing’ programs and online training | Availing of training modules and trainers | An increased level of professionalism | Percentage of trainees at the end of trainings, the target group should be journalists, accountants and marketing officers and managers of radios, TV and print media including online websites | 2014-015 | 115.000 USD | MHC, NUR, and media managers |
| | To facilitate the establishment of partnerships and networks between media professionals in Rwanda and those in the region and developed countries to enhance skills development | Facilitate the establishment of partnerships and networks between media | Facilitate study tours | Partnerships engaged | Number of study tours done annually | 2014-2015 | 150.000 USD | MHC and media owners and managers |

Media business growth and transformational challenges with capacity building needs assessment

| | | | | | | | | |
|--|---|--|--|---|--|-----------|-------------|--|
| | | professionals | | | | | | |
| | To establish and Implement viable mechanisms to facilitate the flow of local informational, educational and entertainment content through the media, particularly in rural areas | Establish local content sharing desk | Engaging on table media producers, journalists, editors and managers | Local content developed in media | Established one local information desk Target people: media practitioners | 2015-2016 | 50.000 uSD | MHC, media associations, RMC and media practitioners |
| | To establish processes for achievement of social security for Journalists/media practitioners as well as remuneration that is proportional to their social role and guarantee of their economic independence | Carry out advocacy program | Constitute and implement an advocacy roadmap and program | Problematic agenda of salary in media houses finished | 10% increased level of salary in media houses | 2014-2015 | 5.000 USD | MHC and media owners and managers |
| | To establish and Implement a resource mobilization strategy to gather resources to support capacity building projects for the Media Sector | Draw and implement a resource mobilization strategy for media sector | Hire consultancy services | Human, financial and or material resources acquired | Number of resource projects funded | 2014-2015 | 120.000 USD | MHC |
| | To facilitate the creation of Cooperatives for small and growing media organizations To support small and young consolidated media organizations with subsidies to sustain their growth and enhance responsible journalism | Facilitate the creation of Cooperatives | | | | | | |
| | To establish a grant making mechanism through which journalists and media institutions are funded to conduct Public/Social Interest Journalism | Establish a basket fund/grant making mechanism | Identify and Engage partners to buy idea and bring resources | Some financial issues resolved in media | Number of commitments executed | 2014-2015 | 12.000 USD | MHC |
| | <ul style="list-style-type: none"> To initiate industry/market, audience research projects and surveys informing the performance of Media; | Conduct market and audience researches | Hire consultancies | Media coverage concentration in Rwanda is known | Adopted findings of the survey | 2015-2016 | 150.000 uSD | MHC |

APPENDIX II : MONITORING AND EVALUATION TEMPLATE FOR CAPACITY BUILDING OF MEDIA BUSINESS MANAGEMENT

| Indicator | Baseline, date | Target, date | Mode of data collection | Responsible institution | Frequency of data update | Latest status, date |
|---|-----------------------|---------------------|--------------------------------|--|---------------------------------|----------------------------|
| The number of trained journalists, the increased percentage of local content in media | | | Administrative records | MHC, ARJ, Media owners and managers | Annually | |
| The increased percentage of child related stories in media Increased number of media clubs (youth, pupils, students) | | | Assessment reports | MHC, ARJ, NCC, ARFEM, Media owners and managers | Annually | |
| Increased percentage of adverts | | | Administrative records | Media houses owners and managers and media house personnel | Annually | |
| Percentage of trainees at the end of trainings, the target group should be journalists, accountants and marketing officers and managers of radios, TV and print media including online websites | | | Assessment reports | MHC , NUR, and media managers | Annually | |
| Percentage of trainees at the end of trainings, the target group should be journalists, | | | Administrative records | MHC , NUR, and media | Annually | |

Media business growth and transformational challenges with capacity building needs assessment

| | | | | | | |
|---|--|--|------------------------|--|----------|--|
| accountants and marketing officers and managers of radios, TV and print media including online websites | | | | managers | | |
| Established one trade union for online-broadcasting-print media Target people: media practitioners | | | Administrative records | MHC, RGB, media associations and media practitioners | Annually | |
| Established one local information desk Target people: media practitioners | | | Administrative records | MHC, media associations, RMC and media practitioners | Annually | |
| Established one local information desk Target people: media practitioners | | | Assessment reports | MHC, media associations, RMC and media practitioners | Annually | |
| Number of funded projects annually | | | Assessment reports | MHC and RMC | Annually | |
| Number of designed contract prototypes | | | Assessment reports | MHC, RGB, RMC and media practitioners | Annually | |
| Established one local information desk Target people: media practitioners | | | Assessment reports | MHC, media associations, RMC and media practitioners | Annually | |
| Adopted findings of the survey | | | Administrative | MHC | Annually | |

Media business growth and transformational challenges with capacity building needs assessment

| | | | | | | |
|---|--|--|------------------------|-------------------------------|-----------|--|
| | | | records | | | |
| Percentage of trainees at the end of trainings, the target group should be journalists, accountants and marketing officers and managers of radios, TV and print media including online websites | | | Survey reports | MHC , NUR, and media managers | Monthly | |
| Percentage of trainees at the end of trainings, the target group should be journalists, accountants and marketing officers and managers of radios, TV and print media including online websites | | | Assessment reports | MHC , NUR, and media managers | Quarterly | |
| Percentage of trainees at the end of trainings, the target group should be journalists, accountants and marketing officers and managers of radios, TV and print media including online websites | | | Annual reports | MHC , NUR, and media managers | Quarterly | |
| Adopted findings of the survey | | | Survey reports | MHC | Annually | |
| Percentage of trainees at the end of trainings, the target group should be journalists, accountants and marketing officers and managers of radios, TV and print media including | | | Administrative records | MHC , NUR, and media managers | Annually | |

Media business growth and transformational challenges with capacity building needs assessment

| | | | | | | |
|---|--|--|------------------------|--|----------|--|
| online websites | | | | | | |
| Established one trade union for online-broadcasting-print media Target people: media practitioners | | | Administrative records | MHC, RGB, media associations and media practitioners | Annually | |
| Set of recommendation considered | | | Administrative records | MHC and media owners and managers | Annually | |
| Number of guidelines booklets available and disseminated | | | Annual reports | MHC and media owners and managers | Annually | |
| Number of guidelines booklets available and disseminated | | | Assessment reports | MHC and media owners and managers | Annually | |
| Adopted findings of the survey | | | Administrative records | MHC, RGB, media associations and media practitioners | Annually | |
| Increased percentage level of reading and listening | | | Annual reports | MHC and partners | Annually | |
| Number of designed contract prototypes | | | Administrative records | MHC, RGB, RMC and media practitioners | Annually | |
| Number of designed contract | | | Annual reports | MHC, RGB, | Annually | |

Media business growth and transformational challenges with capacity building needs assessment

| | | | | | | |
|---|--|--|------------------------|--|----------|--|
| prototypes | | | | RMC and media practitioners | | |
| Adopted findings of the survey | | | Administrative records | MHC | Annually | |
| Adopted findings of the survey | | | Annual reports | MHC | Annually | |
| Number of recommendation considered | | | Assessment reports | MHC and training institutions | Annually | |
| Increased number of adverts in media | | | Administrative records | MHC | Annually | |
| Set of recommendation considered Target group: media practitioners and buyers | | | Administrative records | MHC | Annually | |
| 10% increased level of salary in media houses | | | Assessment reports | MHC and media owners and managers | Annually | |
| Number of small newspapers engaged | | | Assessment reports | MHC and media owners and managers | Annually | |
| 10% increased level of salary in media houses | | | Assessment reports | MHC, identified small newspapers and RMC | Annually | |
| Percentage of trainees at the end of trainings, the target group should be journalists, | | | Assessment reports | MHC and media owners and managers | Annually | |

Media business growth and transformational challenges with capacity building needs assessment

| | | | | | | |
|---|--|--|--------------------|-------------------------------|----------|--|
| accountants and marketing officers and managers of radios, TV and print media including online websites | | | | | | |
| All media related data to inform sector and partners availed | | | Assessment reports | MHC , NUR, and media managers | Annually | |
| Percentage of trainees at the end of trainings, the target group should be journalists, accountants and marketing officers and managers of radios, TV and print media including online websites | | | Assessment reports | | Annually | |
| Percentage of trainees at the end of trainings, the target group should be journalists, accountants and marketing officers and managers of radios, TV and print media including online websites | | | Assessment reports | MHC | Annually | |
| Number of study tours done annually | | | Assessment reports | MHC , NUR, and media managers | Annually | |
| Established one local information desk Target people: media practitioners | | | Assessment reports | MHC , NUR, and media managers | Annually | |
| 10% increased level of salary in | | | Assessment | MHC and media | Annually | |

Media business growth and transformational challenges with capacity building needs assessment

| | | | | | | |
|------------------------------------|--|--|--------------------|--|----------|--|
| media houses | | | reports | owners and managers | | |
| Number of resource projects funded | | | Assessment reports | MHC, media associations, RMC and media practitioners | Annually | |
| Number of commitments executed | | | Assessment reports | MHC | Annually | |
| Adopted findings of the survey | | | Assessment reports | MHC , NUR, and media managers | Annually | |

APPENDIX III : QUESTIONNAIRES AND INTERVIEW GUIDES

QUESTIONNAIRE TO JOURNALISTS AND CHIEF EDITORS

The respondent code number

1. Gender:

- a. Male
- b. Female

2. Age:

- a. Under 18
- b. 18-30
- c. 30-40
- d. 40-50
- e. Above 50

Objective 2 : Capacity building needs

3. Education level:

- a. Primary
- b. Secondary
- c. University (Bachelor's)
- d. University (Master's)
- e. Others (Specify)

.....

4. Education fields

- a. Journalism
- b. Communication
- c. Languages
- d. Business studies
- e. Education
- f. Social sciences
- g. Accountant
- h. Management
- i. Other to specify

5. Have had additional skills in journalism ?

- a. Yes

- b. No

- 6. If Yes, in which way?
 - a. Trainings (over 6 months)
 - b. Short courses (under 6 months)
 - c. Study tour
 - d. Auto training on desk

- 7. Indicate where you have got the additional skills?
 - a. In Rwanda
 - b. In other countries
 - c. Online training

- 8. How long have you been working in media in general?
 - a. Less than 5 years
 - b. Between 5 and 10 years
 - c. More than 10 years
- 9. To what extent are you satisfied with your job?
 - a. Very satisfied
 - b. Satisfied a little bit
 - c. Not satisfied

- 10. If you get an opportunity to specialize your skills, which sector would you prefer?
 - a. Economy and business
 - b. Advertizing
 - c. Education, Social welfare,
 - d. Sciences and Technology
 - e. Politics, and investigative journalism
 - f. Entertainment, Culture, show business
 - g. Other (Specify)

.....
- 11. Are you satisfied with the media working conditions in Rwanda?
 - a. Very satisfied
 - b. Satisfied
 - c. Not satisfied

d. Give briefly the reason of your response

.....

12. Are you satisfied with the skills that you have already acquired ?

a. Yes

b. No

13. If not satisfied, in which areas of skills should be helped to improve?

a. Reporting

b. Presentation

c. Editing (writing/audio/video)

d. Camera

e. Design

f. Production

g. Other to specify

.....

14. What efficient method do you think should be applied to improve your skills

a. On job training

b. Short courses or evening courses

c. Study tour to other media outlets and institutions in Rwanda

d. We need to go out of Rwanda to improve our skills

e. Mentoring and coaching

15. Does media enterprise pay for training services or other means of upgrading your skills?

a. Yes / b. No

Q16-17-18 ONLY TOWARDS PRINT MEDIA JOURNALISTS

16. Do you think the price of your newspaper is commensurate with the cost of production?

a. Yes / b.No

17. Do you think the price is in connection with the purchasing power of customers?

a. Yes / b.No

18. Is there any challenge associated with newspapers distribution?

a. Distribution cost is very high

b. The salary for distributor is not attractive

c. There is no official market for newspaper

- d. People do not believe us
 - e. Problem of freedom of expression
 - f. Other to specify
19. What could be the solution of your indicated challenge?
 20. What is the main source of your income
 - a. My salary from journalist activities
 - b. Other private jobs
 - c. Selling newspaper
 - d. Other to specify
 21. Do you have the following tools?
 - a) Office
 - b) Office furniture
 - c) Computer
 - d) Internet connection
 22. Indicate the range corresponding to your salary - Salary scale

| | |
|-------------------|--|
| 0-100.0000 | |
| 100.000 – 200.000 | |
| 200.000 – 350.000 | |
| 350.000 – 600.000 | |
| Not specified | |

23. Indicate where you are agree with the following confirmation:

| Item | Yes | No |
|--|-----|----|
| I am a permanent journalist with long term contracts | | |
| I always have monthly or short term contracts | | |
| I do not have any contract | | |
| My media house pays professional tax for me | | |
| My media house pays social security fees for me | | |
| My media house pays insurance fees | | |

24. What is your hope for media growth for the next 5 years?
25. As a journalist, what is your current fear?
 - a. State will not agree the unlimited press freedom
 - b. People shrank in poverty and stop consuming media productions

- c. The bad distribution raises prices
 - d. No investors are interested in the media business
 - e. Journalists are today underestimated in our society
26. Do you think the government is supportive of media growth in Rwanda? Give reasons for your answer
- a. Yes / b. No / c. Reason
27. How are you dealing with financial institutions? (indicate every deal you agree)
- a) I have bank account
 - b) My salary passes through my account
 - c) I have acquired loan from the bank to improve my life style
 - d) Banks do not work well
 - e) I never need bank services
 - f) Banks do not have confidence in journalists
 - g) They provided me a loan for my journalistic project
28. What are your suggestions on the way print media could be more economically sustainable
-

Objective 4: Assess media industry challenges associated with adaptation to the digital media revolution

- 29. Are you aware of the digital revolution in Rwanda? What do you think about it?
- 30. If yes, what doing to adapt your media outlet with digital media systems?
- 31. If you have begun to adapt, are you facing any challenge in the digitalization process?
- 32. If yes indicate them and propose the adequate solution.
- 33. What are your capacity building needs in terms of digitalization system as a journalist?.
- 34. Propose suitable solutions to address all identified capacity gaps

APPENDIX IV

INTERVIEW GUIDE TO MEDIA HOUSE MANAGERS

1. Gender:

a. Male /b. Female

2. Age:

a. 18-30 b. 30-40

c.40-50 d. Above 50

Objective 2: Identify capacity building needs for media businesses to guide the undertaking of effective capacity building initiatives

3. Education level:

a. Primary / b. Secondary /c. University (Bachelor's) /d.University (Master's)/ e.Others (Specify)

4. Education fields

a. Journalism /b.Communication / c.Languages /d.Business studies /e.Education / f.Social sciences /g. Accountant / h. Management /i. Other to specify

5. Have you had additional skills in journalism ?

a. Yes /b. No

6. If Yes, in which way?

a. Trainings

b. Short courses

c. Study tour

d. Online courses

7. Indicate where you have the additional skills?

a. In Rwanda

b. In other countries

c. How long have you been working in media in general?

d. Less than 5 years

e. Between 5 and 10 years

f. More than 10 years

8. If you get an opportunity to specialize your skills, which sector would you prefer?

a. Economy and business

- b. Advertizing
- c. Education, Social welfare,
- d. Sciences and Technology
- e. Politics, and investigative journalis
- f. Entertainment, Culture and short business
- g. Other (Specify)

9. 10. Are you satisfied with the skills of your employees?
- a. Yes
 - b. no
10. If not satisfied, in which areas of skills your employees (journalists) should be helped to improve?
- a. Reporting
 - b. Presentation
 - c. Editing
 - d. Camera
 - e. Design
 - f. Production
 - g. Other to specify
-
11. What efficient method do you think should be applied to improve the skills of your journalists?
- a. On job training
 - b. Training out work
 - c. Short courses
 - d. Study tour to other media outlets and institutions in Rwanda
 - e. To send them out of Rwanda
 - f. Mentoring and coaching
12. Is your media enterprise capable of paying training services or other means of upgrading the skills of your journalists?
- a. Yes
 - b. No
13. Do you set the price of the newspaper and services that you provide independently? (Advert, announcement)
- a. Yes
 - b. No
14. Do you think your prices are commensurate with the cost of production ?
- a. Yes
 - b. No
15. Do you think the prices of your services are in connection with the purchasing power of customers?
- a. Yes
 - b. No
16. Estimate coverage of your media in terms of percentages?

| | | | | | |
|------|--------|------|-------|-------|------|
| Area | Kigali | East | South | North | West |
| % | | | | | |

17. Are you satisfied with your coverage?

- e. Yes
- f. No

18. If no, what challenges are you facing to expend the coverage?

.....

19. Suggest adequate solution to address challenges of limited coverage

.....

20. What is your plan to attract more customers?

.....

21. Human Resources

| | | | | | |
|-----------------------------------|--------|--|--------|---|--------|
| Number of journalists do you have | | Number journalists who did journalism or communication | | Number journalists who did other options than journalism or communication | |
| Male | Female | Male | Female | Male | Female |
| | | | | | |

22. How do you proceed to recruit the best personnel

- a. Through a public job offer
- b. Through references
- c. Trough a list of job seekers
- d. Through my friends
- e.

23. Is there any challenge associated to the recruitment? If any, indicate it.

.....

24. What could be the solution to your indicated challenge?

.....

Objective 3: Suggestive ways of how PRINT (OR BROADCAST AND ONLINE) can be more economically sustainable

25. What is the legal status of your company? -----

- a. How many share holders are you? -----
- b. How much was the starting capital? -----

26. What is your financial status for the last three years

| Year | 2010 | 2011 | 2012 |
|--------------------------|------|------|------|
| Annual net result in RFW | | | |

27. What is the main source of your income

- a. Newspaper sales
- b. Donors
- c. Contribution of shareholders
- d. Advertisement
- e. Announcements
- f. Financed programs
- g. Whoever brings content pays
- h. Other to specify.....

.....

28. In which activity do you spent most of your budget ? (which %)?

- a. Trainings
- b. Gathering news or content
- c. PRINT (OR BROADCAST AND ONLINE)ing
- d. Rent office
- e. Computers
- f. Salaries
- g. Taxes
- h. Insurance
- i. Transport
- j. Communication
- k. Other to specify

29. Do you get a real profit?

- a. Yes
- b. No

30. If yes, estimate your monthly profit.....

31. If no, What are challenges are you facing ? Estimate your monthly loss.....

32. What are you planning for the future of your media house

33. Do you have the following documents?

- a) Market plan
- b) Business plan
- c) Strategic plan
- d) Action plan
- e) Capacity building plan

34. Do you have the following items?

- e) Office
- f) Office furniture
- g) Computers
- h) Internet connection

35. Indicate the range corresponding to the salaries of your journalists

Salary scale

| | |
|-----------------|--|
| 0-100.0000 | |
| 100000 – 200000 | |
| 200000 – 350000 | |
| 350000 – 600000 | |
| Not specified | |

Lowest salary scale

| | |
|-------------------|--|
| 10000 – 100000 | |
| 100000 – 150000 | |
| 150 000 - 200 000 | |
| Not specified | |

36. How many journalists do have contracts, insurance from your company and paid social security, paid professional tax

37. Specify the social statuses of your journalists employees

| Item | Number |
|--|--------|
| Permanent journalists with long term contracts | |
| Journalists with monthly or short term contracts | |
| Journalists without contracts | |
| Journalists whom the media house professional tax | |
| Journalists whom the media house pays social security fees | |
| Journalists whom the media house pay insurance fees | |

38. Do you ever pay the taxes as media house operating in Rwanda?

- a. Yes
- b. No

39. If yes, how much was the highest VAT that you paid?

40. What is your hope for media growth for the next 5 years?

41. As a media manager, what is your current fear?

- a. State will not agree the unlimited press freedom
- b. People shrank in poverty and stop consuming media productions
- c. The bad distribution raises prices
- d. No investors are interested in the media business
- e. Journalists are today underestimated in our society

42. Do you think the government is supportive of media growth in Rwanda?

- a. Yes
- b. No
- c. Give reasons for your answer

43. What are your strengths in marketing media business?

- a. Good machine
- b. Skilled journalists
- c. Financial
- d. Interesting news
- e. Other(specify)

.....

44. What are your capacity building needs in it terms of business management?

45. How are you dealing with financial institutions?

- h) All employees have accounts
- i) The salaries are always deposited to the accounts of employees
- j) Customer deposit money to our accounts while paying services
- k) We have acquired loan from the bank to improve business
- l) Banks do not work well
- m) I never need bank services
- n) Banks do not have confidence in media houses
- o) They do not provide loans to media houses

46. What are your suggestions on the way PRINT (OR BROADCAST AND ONLINE) media could be more economically sustainable

Objective 4: Assess media industry challenges associated with adaptation to the digital media revolution

47. Are you aware of the digital revolution in Rwanda? What do you think about it?

48. If yes, what is your plan to adapt your media outlet with digital media systems?

49. If you have begun to adapt, are you facing any challenge in the digitalization process? If yes indicate them and propose the adequate solution.

50. What are your capacity building needs in it terms of digitalization system as a media manager?

51. Propose suitable solutions to address all other identified capacity gaps

APPENDIX V

INTERVIEW GUIDE TO COMMUNITY RADIO MANAGERS

Objective 1: Identify operational challenges faced by Rwanda’s community radios media

- 1 How would you like to call your media house according to its goal.....
- 2 What is your perception on community radios in Rwanda? Do you think that name is appropriate to generalise all non-public radios and none commercial ones?
- 3 What can you say about the content of your media? Do you think it is covering all needs of the target consumers?

Some community radios are affiliated to RBA while others are managed by associations. What about yours?

Who is the founder and the administrator

- 4 How do you make profits?

Objective 2: Identify capacity building needs for media businesses to guide the undertaking of effective capacity building initiatives

- 5 What is the level of education are your journalists?

| Level | Self trained | Bachelors’ degree | Masters’ degree | Other (specify) |
|--------|--------------|-------------------|-----------------|-----------------|
| number | | | | |

- 6 Are you satisfied with the skills of your employees?

- a) Yes
- b) A little bit
- c) Not at all

- 7 If not satisfied, in which areas of skills your employees should be helped to improve?

- 8 Propose where and how the skills of your employees should be upgraded.

- 9 What efficient method do you think should be applied to improve the skills of your journalists?

- 10 Have you learned business management in general or media business management in particular?

| Level | Self trained | Bachelors’ degree | Masters’ degree | Other |
|-------|--------------|-------------------|-----------------|-------|
| | | | | |

- 11 Is your media enterprise capable of paying training services or other means of upgrading the skills of your journalists?

12 Propose suitable solutions to address identified capacity gaps

Objective 3: Suggestive ways on how commercial radio can be more economically sustainable

13 What is source of your income?

14 What is your financial status for the last ten years

| Year | 2010 | 2011 | 2012 |
|--------------------------|------|------|------|
| Annual net result in RFW | | | |

15 What portion of your budget is spent on the training of your employees?

16 Do you ever pay the VAT?

17 If yes, which has been the highest VAT you ve paid?

18 Indicate the problems that hinder your growth in from most important to less important

19 Suggest to address each of the above issues?

20 What is your hope for media growth for the next 5 years?

21 Do you think the government is supportive of media growth in Rwanda? Give reasons for your answer

22 What are your strengths in marketing media business?

a. Good stuff

b. Good machine

c. Enough finances

d. Best production

e. Good prices

23 How do you financially manage your priorities?

| Key success factor | Infrastructure (hardware, immobilization) | Personnel (salaries) | Supply (internal and external logistics, sales) | Technology (research and development, training) |
|--------------------|---|----------------------|---|---|
| 100 % budget | | | | |

24 Do you work with financial institutions? How is your relationship with them?

25 What are your suggestions on the ways radios and TVs could be more economically sustainable

26 What are your capacity building needs in terms of business management?

Objective 4: Assess media industry challenges associated with adaptation to the digital media revolution

27 Are you aware of the digital revolution in Rwanda? What do you think about it?

28 If yes, what is your plan to adapt your media outlet with digital media systems?

29 If you have begun to adapt, are you facing any challenge in the digitalization process? If yes indicate them and propose the adequate solution.

30 What are your capacity building needs in it terms of digitalization system as a media manager?

31 Propose suitable solutions to address other identified capacity gaps

ANNEXE VI

INTERVIEW GUIDE TO TRAINING INSTITUTIONS

- 1- With the increased number of media training schools in Rwanda, can we say the media sector has grown:
 - a. Professionally?
 - b. Economically?
 - c. If not, explain your answer with suggestions of improving the situation

- 2- What is the main transformation that we can observe in the media sector in Rwanda
 - a. Number of journalists increased; b. Number of media outlets increased
 - c. Quality of professional journalism increased
 - d. Economically (life style of journalists)
 - e. Schools of journalism
 - f. Digital TV and expansion of TV signal
 - g. Expansion of Internet, f. Other to specify.....
- 3- What are the main challenges that face the media sector in Rwanda is ? Give your suggestions to address them.
- 4- Is there any international training centre or school of journalism are referring your teaching curricula? Tell us about it and the advantages that you are gaining from that reference?
- 5- Do you have courses related to media business management in your programs? What are these? What are their impact in media management in Rwanda today?
- 6- Are you planning to start Master's in Journalism in few years? Tell us about it in details
- 7- What do you say about the specialization of journalists in other different domains out of communication and journalism? (for example the principle that every journalism ought to know well at least one more discipline : science, philo, laws, etc.)
- 8- What can you say about people who did other fields than journalism and have interest in journalism training and become professional journalists?
10. For professional journalism what do you think about the level of education and exclusive field to be a journalist in Rwanda?
11. Do you think Rwandan journalists need additional skills to become perfect on their job even if they hold diploma or bachelor's degree in Journalism from your school? Suggest in which field they should have additional skills and the way it should be done? (Training, short courses, study tour, online courses)
12. If journalists should have additional skills, do think it should be done in Rwanda or in foreign countries?
13. What challenges do you think print media are facing in Rwanda? Suggest the way they should be resolved.....

14. What is your perception on community-based media in Rwanda? Are you satisfied with that name or you have another alternative? Are they meeting the needs for the population?
15. What can you suggest to the Rwandan media sector so that it can increase its income and become more economically sustainable?
16. We think newspapers are covering a small region in Rwanda, especially Kigali city, but also customers are still few. If you agree with us what wrong with this market? Suggest the solution.
17. Do you think the government is supporting the idea of media growth in Rwanda? Give reasons for your answer
18. In your own view banks should have a big role to play In media business growth? Do you see any challenge ? Suggest the solutions
19. These days in Rwanda we are launching migration of analogue system to digital system. How are adapting your program or curricula to this revolution?
20. Media have started to adapt themselves to the digital system. At which level do you think they are? Is there any challenge do you think they are facing? If yes suggest the solutions

APPENDIX VII

INTERVIEW GUIDE TO THE CIVIL SOCIETY

- 1) What is your relationship with the media sector in Rwanda? Do you finance some programs through print, broadcast or online media? Which one?
- 2) How do you appreciate your collaboration? Clear, fair, unfair?
- 3) Do you have your own journalists? Your own media, your periodical program. Are they recognized by Media High Council or Rwanda Media Commission?
- 4) Do you need the specialization of current journalists in your work field?
- 5) If you like, that should ask you to finance trainings? Are you ready to collaborate with MHC in such training project?
- 6) Is there any transformation observed in media sector in Rwanda? If you have conducted a research or you did a report can you tell us about the state of media in Rwanda?
- 7) Are satisfied with the skills of journalists and media managers in Rwanda? If no, suggest how they should be helped to get additional skills
- 8) What are challenges do you think newspapers are facing in Rwanda? Suggest the solutions
- 9) What is your perception on community-based media in Rwanda? Are you satisfied with that name or you have another alternative? Are they meeting the needs for the population? Is there any challenge do you think they are facing? Suggest the solution.
10. Do think there is media business growth in media sector in Rwanda? If no, what are the challenges? Suggest the solution.
11. These days in Rwanda we are launching migration of analogue system to digital system. Do you think Rwandan media are ready to adapt themselves to that new system? What do you think about the population purchasing capacity?
12. In your own view, how media houses should be helped to develop themselves?
13. What are the main challenges that media sector is facing in Rwanda? Suggest the adequate solutions

APPENDIX VIII

INTERVIEW GUIDE TO CONTENT PRODUCERS

1. What is your relationship with media in Rwanda?
2. Are you satisfied with the way Rwandan media is broadcasting or publishing your content or arts?
3. If not, what are the challenges and suggest the adequate solutions
4. Does media broadcast or publish your content or arts free of charge? In other hand do you provide the content to media free of charge? If so, how could media make profit, and you how do you make a profit?
5. Are you satisfied with the relationship between you and media in Rwanda? If no, suggest the way it should be improved.
6. Have you noticed any change in media sector in Rwanda? If you did, what is your role about it?
7. What is your perception on community-based media in Rwanda? Are they meeting the needs for the population?
8. Is there any challenge do you think they are facing? Suggest the solution?
9. What is your perception on print media in Rwanda? How is your relationship with it? If you have noticed some challenges that print media is facing please tell us about them and suggest adequate solutions.
10. How can you evaluate the media business in Rwanda? What can you suggest to help them access finance?
11. These days in Rwanda we are launching migration from analogue system to digital system. Do you think Rwandan media are ready to adapt themselves to that new technology?
12. Tell us about the challenges that media will probably face and suggest the solutions?
13. What are probably the capacity building needs to digital system adaptation?

APPENDIX IX

INTERVIEW GUIDE TO MEDIA INVESTORS

- 1) Are you working closely with media houses ? What do you sell to media, what do you buy from media? Are they private or public media? How is your relationship with them?
- 2) If you faces challenges in your collaboration, what is the problem?
- 3) Do you think media managers have enough skills to manage media houses as a business entity?
If no, what are challenges? Suggest the solutions.
4. What are challenges do you think newspapers are facing in Rwanda? Suggest the solutions
4. How to evaluate the media sector among all of the economic sectors? What is your advice for media to be business oriented and be economically sustainable for a long term?
.....
5. What is your perception on community-based media in Rwanda? Is there any challenge do you think they are facing? Suggest the solution. Do you have interest to work particularly with them?
6. What is your perception on print media in Rwanda? What can you suggest in order to adress its multiple gaps (bankrupt, irregularity, lack of customers, higher prices, etc.) ?
7. These days, in Rwanda we are launching migration of analogue TV system to digital system. Do you think 7. Rwandan media are ready to adapt themselves to that new system? What about the population purchasing capacity?
8. What can you suggest in terms of capacity bulding of journalists and media managers to adapt that digital revolution?
9. What could be the challenges? Suggest solutions.
10. Can you agree to participate in a selling plateform which will include press, phone cards, tv subscriptions, and so on?

APPENDIX X

INTERVIEW GUIDE TO EXPERTS, MEDIA PARTNERS

2. How long have you been working with media in Rwanda?
3. In your own view, is there any transformation in media sector in Rwanda?
4. What is your field of intervention in media sector in Rwanda?
5. Do you have any plan related to capacity building for media managers and for journalists in these days?
6. Have you already done something in that field? If yes, tell us about the achievements.
7. If no, what can you suggest if you are invited to invest in Rwandan media sector?
8. What is your perception on community-based media in Rwanda? Do you think they are meeting the needs of the population?
9. Did you notice any challenge that those media are facing? Suggest the solution
10. Can you intervene in the community based media financing or operating?.
11. In your own view what are challenges that newspapers are facing in Rwanda? Suggest the solutions? Do you plan to support print media? How?
12. In your own view what is the status of business in media sector in Rwanda?

APPENDIX XI

INTERVIEW GUIDE TO THE PRIVATE SECTOR

- 4) Are you working closely with media houses? (open accounts, saving, loan, etc). how is your relationship with them?
- 5) Do you easily provide loan to them? If yes, how are they paying back? If no, why they are not requesting loans in your own view?
- 6) If they request loan, what is its impact on the media development?
- 7) What is your advice for media to be business oriented and be economically sustainable for a long term.
- 8) Do you think media managers have enough skills to manage media houses as a business entity?
If no, what are challenges? Suggest the solutions.
- 9) What is your perception on community-based media in Rwanda? Is there any challenge do you think they are facing? Suggest the solution. Do you have interest to work particularly with them?
- 10) What is your opinion about the investing in newspapers? You know many challenges that the sector is facing in Rwanda? (Total failure, irregularity, high costs of printing, etc.) Suggest the solutions
- 11) How can you appreciate the media sector in Rwanda? It is not economically sharp. What can you suggest in order to help them to access finance and sustainability?
- 12) Today, digitalization is revolutionizing the media sector. Anolog television is over now. But that impacts the whole sector. What can you suggest in order to transform challenges into business opportunities?
- 13) Do you think Rwandan media and Rwandan journalists or managers are able to use successfully the new system? What kind of training to plan for their capacity building needs?
- 14) Can If one or two projects related to the training reform, to the business management reform, could it meet your interest?
- 15) Let us suppose a business project to extend the selling point of newspaper out of Kigali, how do you understand it?
- 16) Let us suppose a business project to generate telephone software dedicated to television, radio and print. Could it meet your interest?
- 17) Let us suppose a business project for a paper factory in Rwanda. Could it meet your interest?
- 18) If an investor propose you to finance a very long term development project that leads to increase literacy in Rwanda (put boards on roads, on cars, to help writers, journalists, etc.), could it meet your interest?

ANNEXE XII

INTERVIEW GUIDE TO GOUVERNMENT INSTITUTIONS – MHC-RDB-MYICT

1. What is your intervention in the Rwanda media sector?
2. What kind of media is under your responsibility? Why these and why not those?
3. The struggle for business success contributes to the proliferation of radio and press, do you think it does not harm the quality of journalism? Or can we say it is another way of doing business with journalism?
4. What is a good journalism for you? Between professionalism and business oriented?
5. What is your perception on community-based radio in Rwanda? Are you satisfied with that name?
6. If not satisfied, suggest an appropriate name and new classification of broadcast media in particular and all the media sector in Rwanda
7. Are community radios meeting the needs for the population?
8. Is there any challenge do you think they are facing? Suggest the solution.
9. What do you think about the development of Newspapers in Rwanda?
10. Is the price of newspapers corresponds to the cost of production?
11. What are factors behind the small number of newspapers buyers in Rwanda?
12. What are factors behind the small coverage of newspapers in Rwanda?
13. Talk about other challenges that newspapers are facing in Rwanda?
14. Suggest the adequate solutions for all challenges mentioned above?
15. In your own view, what are the capacity building needs for media in Rwanda?
16. Talking about the office facilities in media houses, do you think they have offices, furniture computers, internet connection, etc?
17. If no, what should be done to solve the problem? Don't you think you should intervene in context of capacity building and material needs for media?
18. In your own view, do you think media managers, journalists and other employees are well paid?
19. If no, do not you think that it is a big challenge for media development?
20. Do you know if the journalists are working on contract or not?
21. Suppose that some media houses are not providing contracts to journalists, how would you intervene?
22. If the most of above problems exist in media houses in Rwanda, don't you think they are linked to the lack of managerial skills of managers?
23. How can media managers get the lacking skills?
24. What can be your intervention?
25. In Rwanda, the media industry has started to adapt itself to the digital media revolution. What is the level of achievement in your own view?

26. What are challenges do you think are associated with adaptation to the digital system today? (infrastructure, journalists skills, managers, environment, etc)
27. What should be the adequate solutions?
28. Suggest ways on how print and broadcast media can access finances and other alternative revenue generating streams.(Advertisement, fix adequate fees for service, improve services, etc.)

SPECIFIC QUESTIONS

29. What do you say about the specialization of journalists in other different domains out of information communication and journalism options? (For example the principle that every journalism ought to know well at least one more discipline: science, philo, laws, etc.)
30. What can you say about the invitation to other educational fields to find interest in journalism in order to diversify it?
31. Can you have permanently a consequent budget in order to finance the master level of journalism abroad, or can you suggest the foundation of a master level in Rwanda?
32. How do you think Rwandan people can improve their interest in reading?
33. Why your institution deals with public and commercial media only, while we are observing a great number of journalists in different institution? Why not to consider them under your responsibility? (ex. A newspaper of a cooperative or an association is not different from a community based radio, websites, etc.)

APPENDIX IV : TOPICS DABATED ON IN THE FOCUS GROUP DISCUSSION MEETING

Business: Why are businessmen reluctant to invest in media sector in Rwanda? Why are printing costs high? Why Rwanda does not yet have a paper factory?

Marketing: Why are newspapers not valued enough on the Rwanda market? Why are they only concentrated in the City of Kigali, and even in the streets? Yet in Kinyarwanda, they say *umunyu wabunze witwa ivu* (salt sold on the street could be ash)

Social: What is the degree of esteem in the world of media and journalists in the Rwandan society? They are almost underestimated, somehow marginalized, thereby inhibiting their development mechanism.

Opportunity: Many other economic sectors (political, legal, business, real estate, engineering, agriculture, science, health, transport, etc.) could benefit from the journalism profession. How can journalists diversify their profiles to embrace these areas?

Education: Are Journalism Studies attractive in Rwanda? Do finalists from schools of journalism easily access employment? What is their rate of employability? What is their effectiveness?

Culture: In Rwanda, entrepreneurship is still facing cultural barriers, for instance oral tradition that prevents the development of print media business. This aspect affects even television. Could the reinforcement of a new culture of writing and reading in Rwanda be the best way to stimulate media business?

Technology: Are the phone and the internet really able to stop the traditional media industry (press, radio and television)? Alternatively, media is taking profit from the phone and the internet. How is it in Rwanda?

Media digitalization: Will it boost the media business or not? How digital migration could hamper consumers of the small screen if precautions are not taken in advance. Where will people store the old TV receivers? Moreover, what about protection of the environment? How do we support consumers to obtain new digital TV? Can the State agree to come to the rescue of this sector?

APPENDIX V : LIST OF RESPONDENTS

INSTITUTIONS

| <i>DOMAIN</i> | <i>RESPONDENT</i> | <i>INSTITUTION</i> | <i>RELATION WITH MEDIA</i> |
|-----------------------|---|--|---|
| MEDIA PARTNERS | NTABAYE BYICAZA Vicky, Chargé des Missions | Institut Panos Paris | Capacity building interaction between media, local leaders and citizens |
| | KALISA Narcisse, Program Director | Search for Common Ground | Media development, Use of media for conflict transformation |
| TRAINING INSTITUTIONS | JUUKO ERNIS | MONT KENYA UNIVERSITY | Academic teaching |
| | MBARAGA Paul | UNIVERSITY OF RWANDA, School of journalism | Academic teaching |
| | NZAMWITA Alex | CATHOLIC INSTITUTE OF KABGAYI | Journalism and Public Relations studies |
| | Rev UWIMANA Jean Pierre | GREAT LAKES MEDIA CENTER | Journalism training centre |
| CIVIL SOCIETY | Rudakemwa Annick Nicky, | RWANDA CIVIL SOCIETY PLATFORM | Contributed in elaboration of the law on the media in Rwanda |
| CONTENT PRODUCERS | UYIRINGIYE Leandrine | ANDRES MEDIA INDUSTRY | Programs production and advertising |
| | Ndiringiye Davis | BRIDGE RECORDS | Music producer |
| | | SENDERI INTERNATIONAL | Music producer |
| | ISHIMWE Clement | KINA MUSIC | Music producer |

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|-------------------------|--|----------------------------------|--|
| MEDIA INVESTORS | RUGINA Sylvia | NATION HOLDINGS RWANDA LTD | |
| | Baganahe Reymond | TIGO | Advertising, program sponsoring |
| | Kamanzi Hussein | STAR AFRICA MEDIA | Publicist, return of customers |
| | Mugabe Robert, Marketing officer | MTN RWANDA | Advertising, program sponsoring |
| | Magara John | AIRTEL | Advertising, program sponsoring |
| | NYONI J Luc | TELE 10 | Advertising |
| PRIVATE SECTOR | BYAMUKAMA Shivona, Company Secretary and Head of Corporate Affairs | BANK OF KIGALI BK | Banking and financing operation |
| | Frank ABAHO, Public Relation Officer | BANQUE RWANDAISE DE DEVELOPPMENT | Banking and financing |
| GOVERNMENT INSTITUTIONS | MBUNGIRAMIHIGO Peacemaker, Executive Secretary | MEDIA HIGH COUNCIL | Capacity building of media |
| | KANYANGE Brigitte, Marketing Senior Officer | RWANDA DEVELOPMENT BOARD | Companies creation, development, bank operations |
| | MIGISHA MAGNIFIQUE, Public relation officer | MINISTRY OF YOUTH AND ICT | Youth department and ICT development |

Media business growth and transformational challenges with capacity building needs assessment

| LISTS OF JOURNALISTS AND CHIEF EDITORS PARTICIPATED IN THE ASSESSMENT | | | | | | | |
|--|-----------|---|---------------|-----------------|--------------------|-----------------------|------------------------------|
| DATA COLLECTORS NAME | ID | Respondent name optional / ADDRESS | GENDER | POSITION | Media organ | CATEGORY | District of residence |
| NZARAMBA IRENEE | 1 | MANZI | M | JOURNALIST | CITY RADIO | BROADCAST | NYARUGENGE |
| NZARAMBA IRENEE | 2 | KUBWIMANA NELSON | M | JOURNALIST | CITY RADIO | BROADCAST | NYARUGENGE |
| NZARAMBA IRENEE | 3 | SAFARI AMRY | M | JOURNALIST | CITY RADIO | BROADCAST | NYARUGENGE |
| NZARAMBA IRENEE | 4 | TWIRINGIYIMANA FIDELE | M | JOURNALIST | RADIO ONE | BROADCAST | NYARUGENGE |
| NZARAMBA IRENEE | 5 | NGABIRANO OLIVIER | M | JOURNALIST | RADIO ONE | BROADCAST | NYARUGENGE |
| NZARAMBA IRENEE | 6 | GISA FAUSTA M | F | JOURNALIST | AMAZING GRACE | COMMUNITY BASED MEDIA | NYARUGENGE |
| NZARAMBA IRENEE | 7 | HAKIZUWERA FULGENCE | M | JOURNALIST | AMAZING GRACE | COMMUNITY BASED MEDIA | NYARUGENGE |
| NZARAMBA IRENEE | 8 | KALINIJABO JEAN DE DIEU | M | JOURNALIST | AMAZING GRACE | COMMUNITY BASED MEDIA | NYARUGENGE |
| NZARAMBA IRENEE | 9 | MUSENGIMANA EUGENE MBATRIX | M | JOURNALIST | FLASH FM | BROADCAST | NYARUGENGE |
| NZARAMBA IRENEE | 10 | KARANGWA VITAL | M | JOURNALIST | FLASH FM | BROADCAST | NYARUGENGE |
| NZARAMBA IRENEE | 11 | JADO MAX | M | JOURNALIST | FLASH FM | BROADCAST | NYARUGENGE |
| NZARAMBA IRENEE | 12 | 078644168 | M | JOURNALIST | ISANGO STAR | BROADCAST | NYARUGENGE |
| NZARAMBA IRENEE | 13 | 0786854003 | M | JOURNALIST | ISANGO STAR | BROADCAST | NYARUGENGE |
| NZARAMBA IRENEE | 14 | JEAN NGENDAHIMANA CHRIS | M | JOURNALIST | ISANGO STAR | BROADCAST | NYARUGENGE |
| NZARAMBA IRENEE | 15 | SAM | M | JOURNALIST | IZUBA RIRASHE | PRINT | GASABO |
| NZARAMBA IRENEE | 16 | PASCAL | M | JOURNALIST | IZUBA RIRASHE | PRINT | GASABO |
| NZARAMBA IRENEE | 17 | UWANZIGA APPOLLONIA | F | JOURNALIST | IZUBA RIRASHE | PRINT | GASABO |
| NZARAMBA IRENEE | 18 | KAGAHE JEAN LOUIS | M | JOURNALIST | IZUBA RIRASHE | PRINT | GASABO |
| NZARAMBA IRENEE | 19 | NIYIGENA FAUSTIN | M | JOURNALIST | IZUBA RIRASHE | PRINT | GASABO |
| NZARAMBA IRENEE | 20 | KAGIRANEZA OLIVIER | M | JOURNALIST | IZUBA RIRASHE | PRINT | GASABO |
| NZARAMBA IRENEE | 21 | 0785782629 | M | JOURNALIST | VOICE OF AFRICA | COMMUNITY BASED MEDIA | NYARUGENGE |
| NZARAMBA IRENEE | 22 | NDABATEZE JEAN BOSCO | M | JOURNALIST | UMUCYO | COMMUNITY BASED MEDIA | NYARUGENGE |

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|------------------|----|-----------------------------|---|--------------|-----------------|-----------------------|------------|
| NZARAMBA IRENEE | 23 | 0785675665 | M | JOURNALIST | - | - | NYARUGENGE |
| NZARAMBA IRENEE | 24 | KALINIJABO ISSA NOEL | M | JOURNALIST | AUTHENTIC | COMMUNITY BASED MEDIA | KICUKIRO |
| NZARAMBA IRENEE | 25 | BIHIBINDI NUHU | M | CHIEF EDITOR | VOICE OF AFRICA | COMMUNITY BASED MEDIA | NYARUGENGE |
| MWIZERWA ORIGENE | 26 | ISHIMWE RUGIRA GISELE | F | JOURNALIST | RC MUSANZE | COMMUNITY BASED MEDIA | MUSANZE |
| MWIZERWA ORIGENE | 27 | UWIMANA EMMANUEL | M | JOURNALIST | RC MUSANZE | COMMUNITY BASED MEDIA | MUSANZE |
| MWIZERWA ORIGENE | 28 | NKURUNZIZA THEONESTE | M | JOURNALIST | RADIO IZUBA | COMMUNITY BASED MEDIA | NGOMA |
| MWIZERWA ORIGENE | 29 | MUKANEZA PELAGIE | F | JOURNALIST | RADIO IZUBA | COMMUNITY BASED MEDIA | NGOMA |
| MWIZERWA ORIGENE | 30 | MUTETERI GENEVIEVE | F | JOURNALIST | - | - | NGOMA |
| MWIZERWA ORIGENE | 31 | BAYINGANA BONFILS | M | JOURNALIST | RADIO IZUBA | COMMUNITY BASED MEDIA | NGOMA |
| MWIZERWA ORIGENE | 32 | NDAYISABA HERMAN | M | JOURNALIST | - | - | RUBAVU |
| MWIZERWA ORIGENE | 33 | 0788574346 | M | JOURNALIST | RBA | BROADCAST | RUBAVU |
| MWIZERWA ORIGENE | 34 | INGABIRE ALPHONSINE | F | JOURNALIST | - | - | RUBAVU |
| MWIZERWA ORIGENE | 35 | MUHIRWA TERENCE | M | CHIEF EDITOR | RADIO SALUS | BROADCAST | HUYE |
| MWIZERWA ORIGENE | 36 | MUKAMANA JEANETTE | F | CHIEF EDITOR | - | - | HUYE |
| MWIZERWA ORIGENE | 37 | 0783281958 | M | JOURNALIST | RADIO SALUS | BROADCAST | HUYE |
| MWIZERWA ORIGENE | 38 | NZABIHIMANA PRINCE THEOGENE | M | JOURNALIST | RADIO SALUS | BROADCAST | HUYE |
| MWIZERWA ORIGENE | 39 | 0722060454 | M | JOURNALIST | RADIO SALUS | BROADCAST | HUYE |
| MWIZERWA ORIGENE | 40 | HABIMANA OLIVIER | M | JOURNALIST | RADIO SALUS | BROADCAST | HUYE |
| MWIZERWA | 41 | 0785973910 | M | JOURNALIST | - | - | - |

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| ORIGENE | | | | | | | |
| MWIZERWA ORIGENE | 42 | RUZINDANA CHARLES | M | JOURNALIST | RC HUYE | COMMUNITY BASED MEDIA | HUYE |
| MWIZERWA ORIGENE | 43 | NDIKUMANA CAMILLE | M | JOURNALIST | RC HUYE | COMMUNITY BASED MEDIA | HUYE |
| MWIZERWA ORIGENE | 44 | 0788760596 | F | JOURNALIST | RC HUYE | COMMUNITY BASED MEDIA | HUYE |
| MWIZERWA ORIGENE | 45 | MURINDABIGWI EPHREM | M | CHIEF EDITOR | RADIO HUGUKA | COMMUNITY BASED MEDIA | MUHANGA |
| MWIZERWA ORIGENE | 46 | MUKARUBAYIZA FLORENTINE | F | JOURNALIST | - | - | MUHANGA |
| MWIZERWA ORIGENE | 47 | ISHIMWE HONORE | M | JOURNALIST | RADIO HUGUKA | COMMUNITY BASED MEDIA | MUHANGA |
| MWIZERWA ORIGENE | 48 | UFITINEMA VIOLETTE | F | JOURNALIST | - | - | - |
| MWIZERWA ORIGENE | 49 | NTAKIRUTIMANA PACIFIQUE | M | JOURNALIST | - | - | - |
| MWIZERWA ORIGENE | 50 | NDAGIJIMANA DIOGENE | M | CHIEF EDITOR | RADIO MARIA | COMMUNITY BASED MEDIA | MUHANGA |
| MWIZERWA ORIGENE | 51 | NKURUNZIZA FELECIEEN | M | JOURNALIST | - | - | MUHANGA |
| HABIMANA OBED | 52 | 0788524315 | M | CHIEF EDITOR | IMVAHO NSHYA | PRINT | NYARUGENGE |
| HABIMANA OBED | 53 | NKUNDIMANA NOEL | M | CHIEF EDITOR | RADIO UMUCYO | COMMUNITY BASED MEDIA | NYARUGENGE |
| HABIMANA OBED | 54 | 0788484974 | M | CHIEF EDITOR | K FM | BROADCAST | NYARUGENGE |
| HABIMANA OBED | 55 | KASM | M | CHIEF EDITOR | RADIO RWANDA | BROADCAST | NYARUGENGE |
| HABIMANA OBED | 56 | MUVUNYI ANDREW | M | JOURNALIST | UMUSINGI | PRINT | GASABO |
| HABIMANA OBED | 57 | KAYITARE JEAN PAUL | M | JOURNALIST | RUSHYASHYA.NET | ONLINE | KICUKIRO |
| HABIMANA OBED | 58 | USENGIMANA LYCIEN | M | JOURNALIST | UMURYANGO | ONLINE | GASABO |
| HABIMANA OBED | 59 | MUSONERA SOSTHENE | M | JOURNALIST | PAX PRESS | PRINT | KICUKIRO |
| HABIMANA OBED | 60 | - | M | JOURNALIST | RADIO RWANDA INTEKO | BROADCAST | GASABO |
| HABIMANA OBED | 61 | MELISSA | F | JOURNALIST | RADIO RWANDA INTEKO | BROADCAST | GASABO |

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|-----------------|----|-------------------------|---|--------------|---------------------|-----------------------|------------|
| HABIMANA OBED | 62 | MUKANDINDA AGNES | F | JOURNALIST | RADIO RWANDA INTEKO | BROADCAST | GASABO |
| HABIMANA OBED | 63 | - | F | JOURNALIST | RADIO RWANDA | BROADCAST | NYARUGENGE |
| HABIMANA OBED | 64 | - | F | JOURNALIST | RADIO RWANDA | BROADCAST | NYARUGENGE |
| HABIMANA OBED | 65 | DAN | M | JOURNALIST | RADIO RWANDA | BROADCAST | NYARUGENGE |
| HABIMANA OBED | 66 | MUKANGIRA MEDIATRICE | F | JOURNALIST | RADIO RWANDA | BROADCAST | KICUKIRO |
| HABIMANA OBED | 67 | CYIZA WILSON | M | JOURNALIST | RADIO UMUCYO | COMMUNITY BASED MEDIA | NYARUGENGE |
| HABIMANA OBED | 68 | MIZERO DIVIN THIERRY | M | JOURNALIST | RADIO UMUCYO | COMMUNITY BASED MEDIA | GASABO |
| HABIMANA OBED | 69 | NAKURE CAISSY CHRISTINE | F | JOURNALIST | RADIO UMUCYO | COMMUNITY BASED MEDIA | NYARUGENGE |
| HABIMANA OBED | 70 | TUYISHIMIRE CONSTANTIN | M | JOURNALIST | RADIO UMUCYO | COMMUNITY BASED MEDIA | NYARUGENGE |
| HABIMANA OBED | 71 | 0788428356 | M | JOURNALIST | IMVAHO NSHYA | PRINT | NYARUGENGE |
| HABIMANA OBED | 72 | 0788678003 | M | JOURNALIST | IMVAHO NSHYA | PRINT | NYARUGENGE |
| HABIMANA OBED | 73 | 0783238988 | F | JOURNALIST | IMVAHO NSHYA | PRINT | NYARUGENGE |
| HABIMANA OBED | 74 | 0788845503 | F | JOURNALIST | IMVAHO NSHYA | PRINT | NYARUGENGE |
| HABIMANA OBED | 75 | - | F | JOURNALIST | IMVAHO NSHYA | PRINT | NYARUGENGE |
| HABIMANA OBED | 76 | - | F | JOURNALIST | RADIO 10 | BROADCAST | GASABO |
| HABIMANA OBED | 77 | UWITONZE FELIX | M | JOURNALIST | RADIO 10 | BROADCAST | GASABO |
| HABIMANA OBED | 78 | - | M | JOURNALIST | RADIO 10 | BROADCAST | GASABO |
| HABIMANA OBED | 79 | - | M | JOURNALIST | K FM | BROADCAST | NYARUGENGE |
| HABIMANA OBED | 80 | GATSINZI VICTOR FIDELE | M | JOURNALIST | KFM | BROADCAST | NYARUGENGE |
| HABIMANA OBED | 81 | MBARAGA ROBERT | M | JOURNALIST | K FM | BROADCAST | NYARUGENGE |
| NZARAMBA IRENEE | 82 | MUNANA | M | CHIEF EDITOR | ISANGO STAR | BROADCAST | NYARUGENGE |
| NZARAMBA IRENEE | 83 | THEO BARASA | M | CHIEF EDITOR | FLASH FM | BROADCAST | KIMIHURURA |
| NZARAMBA IRENEE | 84 | NIYONAMBAZA ASSOUMANI | M | CHIEF EDITOR | RUGALI | PRINT | NYARUGENGE |
| NZARAMBA IRENEE | 85 | 0788304648 | M | CHIEF EDITOR | IZUBA RIRASHE | PRINT | GASABO |
| MUKANGAMIJE | 86 | TWIZEYIMANA FAUSTIN | M | JOURNALIST | IBISHYA.BIZ | ONLINE | KICUKIRO |

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| MEDIATRICE | | | | | | | |
| MUKANGAMIJE MEDIATRICE | 87 | RUGAMBA JEAN PAUL | M | JOURNALIST | IBISHYA.BIZ | ONLINE | KICUKIRO |
| MUKANGAMIJE MEDIATRICE | 88 | SHEMA ELVIS | M | CHIEF EDITOR | IBISHYA.BIZ | ONLINE | KICUKIRO |
| MUKANGAMIJE MEDIATRICE | 89 | NGENZI JULES | M | JOURNALIST | UMUGANGA.COM | ONLINE | NYARUGENGE |
| MUKANGAMIJE MEDIATRICE | 90 | KAREKEZI RAY AZADESI | M | JOURNALIST | UMUGANGA.COM | ONLINE | NYARUGENGE |
| MUKANGAMIJE MEDIATRICE | 91 | RUKUNDO ERASTE | M | JOURNALIST | UMUGANGA.COM | ONLINE | NYARUGENGE |
| MUKANGAMIJE MEDIATRICE | 92 | NYAKURAMA CLEMENCE | F | JOURNALIST | UMUGANGA.COM | ONLINE | NYARUGENGE |
| MUKANGAMIJE MEDIATRICE | 93 | TUYISHIMIRE MOISE | M | JOURNALIST | UMUGANGA.COM | ONLINE | NYARUGENGE |
| MUKANGAMIJE MEDIATRICE | 94 | NIYITEGEKA AURORE | F | JOURNALIST | RADIO INKORAMUTIMA | COMMUNITY BASED MEDIA | GASABO |
| MUKANGAMIJE MEDIATRICE | 95 | KAYONGA IVAN | M | CHIEF EDITOR | RADIO INKORAMUTIMA | COMMUNITY BASED MEDIA | GASABO |
| MUKANGAMIJE MEDIATRICE | 96 | DUSHIMERUGIRA LUC | M | JOURNALIST | RADIO INKORAMUTIMA | COMMUNITY BASED MEDIA | GASABO |
| MUKANGAMIJE MEDIATRICE | 97 | NIRINGIYIMANA EGIDE | M | JOURNALIST | RADIO INKORAMUTIMA | COMMUNITY BASED MEDIA | GASABO |
| MUKANGAMIJE MEDIATRICE | 98 | HABIMANA PASCAL | M | JOURNALIST | RADIO INKORAMUTIMA | COMMUNITY BASED MEDIA | GASABO |
| MUKANGAMIJE MEDIATRICE | 99 | NKURUNZIZA JEAN PAUL | M | JOURNALIST | RADIO INKORAMUTIMA | COMMUNITY BASED MEDIA | GASABO |
| MUKANGAMIJE MEDIATRICE | 100 | GAHONGAYIRE ISABELLE | F | JOURNALIST | AGAKIZA.COM | ONLINE | KICUKIRO |
| MUKANGAMIJE MEDIATRICE | 101 | NGEZAHAYO SIMEON | M | CHIEF EDITOR | AGAKIZA.COM | ONLINE | KICUKIRO |
| MUKANGAMIJE MEDIATRICE | 102 | NZABANDORA LEON | M | CHIEF EDITOR | KIGALI TODAY | PRINT | KICUKIRO |
| MUKANGAMIJE MEDIATRICE | 103 | MBYAYINGABO JOEL | M | CHIEF EDITOR | IREBERO LTD | ONLINE | GASABO |
| MUKANGAMIJE MEDIATRICE | 104 | 0788805855 | M | JOURNALIST | ISANGO STAR | BROADCAST | NYARUGENGE |
| NSENGIYUMVA | 105 | CYUBAHIRO BONAVENTURE | M | JOURNALIST | - | - | GASABO |

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|------------------------|----------|--------------------------------|---|-----------------|-----------------------|-----------|------------|
| VINCENT | | | | | | | |
| NSENGIYUMVA VINCENT | 106 | BUMWE RITHA M CLARISSE | F | JOURNALIST | TV 10 | TV | GASABO |
| NIKUZE CLEMENCE | M 107 | 0788771396 | M | CHIEF EDITOR | ISANGE CORPORATION | ONLINE | KICUKIRO |
| NIKUZE CLEMENCE | M 108 | 0788214207 | M | CHIEF EDITOR | UMURYANGO.COM | ONLINE | NYARUGENGE |
| NIKUZE CLEMENCE | M 109 | NDAYISHIMIYE GIDEON MUPENDE | M | JOURNALIST | ISANGE CORPORATION | ONLINE | KICUKIRO |
| NIKUZE CLEMENCE | M 110 | MBARUSHIMANA ALAIN JOSEPH | M | JOURNALIST | RADIO SALUS | BROADCAST | - |
| NIKUZE CLEMENCE | M 111 | - | M | JOURNALIST | IGIHE .COM | ONLINE | NYARUGENGE |
| NIKUZE CLEMENCE | M 112 | - | M | JOURNALIST | UMUSEKE.COM | ONLINE | GASABO |
| NIKUZE CLEMENCE | M 113 | - | M | JOURNALIST | UMUSEKE.COM | ONLINE | GASABO |
| NIKUZE CLEMENCE | M 114 | 0725645401 | M | JOURNALIST | INYARWANDA.COM | ONLINE | NYARUGENGE |
| NIKUZE CLEMENCE | M 115 | - | M | CHIEF EDITOR | IMVANO.COM | ONLINE | - |
| NIKUZE CLEMENCE | M 116 | - | M | CHIEF EDITOR | UMUSEKE.COM | ONLINE | GASABO |
| NIKUZE CLEMENCE | M 117 | UMUTONI LAETITIA | F | JOURNALIST | UMURYANGO.COM | ONLINE | NYARUGENGE |
| NIKUZE CLEMENCE | M 118 | 0783019636 | F | JOURNALIST | ISHYA N' IHIRWE | PRINT | NYARUGENGE |
| NIKUZE CLEMENCE | M 119 | 0788224297 | M | JOURNALIST | - | - | NYARUGENGE |
| NIKUZE CLEMENCE | M 120 | 0788542538 | M | JOURNALIST | - | - | NYARUGENGE |
| NIKUZE CLEMENCE | M 121 | - | M | JOURNALIST | - | - | NYARUGENGE |
| NIKUZE CLEMENCE | M 122 | 0728869844 | M | JOURNALIST | ISANGE CORPORATION | ONLINE | NYARUGENGE |
| NIKUZE CLEMENCE | M 123 | - | M | JOURNALIST | - | - | NYARUGENGE |

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| NIKUZE M CLEMENCE | 124 | - | F | JOURNALIST | RWANDA TELEVISION | TV | NYARUGENGE |
| NIKUZE M CLEMENCE | 125 | - | M | JOURNALIST | RWANDA TELEVISION | TV | NYARUGENGE |
| NIKUZE M CLEMENCE | 126 | - | M | JOURNALIST | RWANDA TELEVISION | TV | NYARUGENGE |
| NIKUZE M CLEMENCE | 127 | - | M | JOURNALIST | RWANDA TELEVISION | TV | NYARUGENGE |
| NIKUZE M CLEMENCE | 128 | - | M | JOURNALIST | IGIHE .COM | ONLINE | NYARUGENGE |
| NIKUZE M CLEMENCE | 129 | - | M | JOURNALIST | IGIHE .COM | ONLINE | NYARUGENGE |
| MPAYIMANA PHILLIPE | 130 | CHARLES | M | FREELANCE-JOURNALIST | FORMER IMBAGA | PRINT | NYARUGENGE |
| MPAYIMANA PHILLIPE | 131 | 0788664407 | F | FREELANCE-JOURNALIST | FREELANCE | - | NYARUGENGE |
| MPAYIMANA PHILLIPE | 132 | 0788735597 | F | JOURNALIST | FLASH FM | BROADCAST | NYARUGENGE |
| MPAYIMANA PHILLIPE | 133 | 0788293661 | M | JOURNALIST | RBA | BROADCAST | NYARUGENGE |
| NZEYIMANA VIATEUR | 134 | NTAGANIRA JMV | M | JOURNALIST | IMANZI | PRINT | NYARUGENGE |
| NZEYIMANA VIATEUR | 135 | BASANDA NSIMBYI OSWALD | M | JOURNALIST | RADIO INKORAMUTIMA | COMMUNITY BASED MEDIA | GASABO |
| MPAYIMANA PHILLIPE | 136 | 0788217946 | M | JOURNALIST | KINYAMATEKA | COMMUNITY BASED MEDIA | NYARUGENGE |
| NZEYIMANA VIATEUR | 137 | BUGINGO SILVER | M | JOURNALIST | THE INDEPENDENT | PRINT | NYARUGENGE |
| NIKUZE M CLEMENCE | 138 | - | M | JOURNALIST | ISHYA N' IHIRWE | PRINT | NYARUGENGE |
| NIKUZE M CLEMENCE | 139 | 0788562190 | M | JOURNALIST | PAX PRESS | PRINT | NYARUGENGE |
| MPAYIMANA PHILLIPE | 140 | 0788600387 | M | CHIEF EDITOR | UMWEZI | PRINT | NYARUGENGE |
| NZEYIMANA VIATEUR | 141 | 0788455397 | M | JOURNALIST | LA NOUVELLE RELEVE | PRINT | NYARUGENGE |
| NIKUZE M CLEMENCE | 142 | - | F | JOURNALIST | - | ONLINE | NYARUGENGE |

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|-------------------|-----|---|---|----------------------|---|--------|------------|
| NIKUZE M CLEMENCE | 143 | - | M | JOURNALIST | - | ONLINE | NYARUGENGE |
| NIKUZE M CLEMENCE | 144 | - | M | FREELANCE-JOURNALIST | - | - | NYARUGENGE |

LISTS OF MEDIA MANAGERS PARTICIPATED IN THE STUDY

| Data collector name | Id | Respondent name optional / address | Gender | Profession | Level | Media organ | Category | District residence of |
|---------------------|----|------------------------------------|--------|---------------------|---------|------------------|---------------|-----------------------|
| MUNYANTWARI VEDASTE | 1 | UWITONZE CAPITONE | M | JOURNALISM | A0 | GASABO NEWSPAPER | PRINT | NYARUGENGE |
| MUNYANTWARI VEDASTE | 2 | MWITENDE JEAN CLAUDE | M | JOURNALISM | A0 | IMPAMO | PRINT | NYARUGENGE |
| MUNYANTWARI VEDASTE | 3 | NTARINDWA THEODORE | M | JOURNALISM | A0 | UMWEZI | PRINT | NYARUGENGE |
| MUNYANTWARI VEDASTE | 4 | NDUWAYO EMMANUEL | M | JOURNALISM | A2 | ISIMBI | PRINT | KICUKIRO |
| MUNYANTWARI VEDASTE | 5 | NSHIMYUMURWA VENANT | M | SCIENCE DU LGE&COMM | A0 | AMANI | PRINT | GASABO |
| NSENGIYUMVA VINCENT | 6 | 0788306075 | M | MANAGING DIRECTOR | MASTERS | RADIO 10/TV10 | BROADCAST /TV | GASABO |
| NSENGIYUMVA VINCENT | 7 | RUGAMBA JEAN PAUL | M | JOURNALISM | A0 | IBISHYA | ONLINE | KICUKIRO |
| NSENGIYUMVA VINCENT | 8 | 0738590370 | M | MANAGING DIRECTOR | A0 | UMUGANGA .COM | ONLINE | NYARUGENGE |
| NSENGIYUMVA VINCENT | 9 | 0788506370 | F | PUBLISHER | A0 | AGASARO.COM | ONLINE | GASABO |
| NSENGIYUMVA VINCENT | 10 | MISAGO WILSON | M | FINANCE | A0 | INYARWANDA LTD | ONLINE | NYARUGENGE |
| NSENGIYUMVA VINCENT | 11 | 0788547033 | M | JOURNALISM&CO | A0 | UMURIMO.C | ONLINE | NYARUGENGE |

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|---------------------|----|---------------------------|---|--------------------------|-----|------------------------|------------------------------|------------|
| NSENGIYUMVA VINCENT | 12 | 0788352200 | M | JOURNALISM | A0 | UMURYANG O.COM | ONLINE | NYARUGENGE |
| NSENGIYUMVA VINCENT | 13 | 0785346914 | M | JOURNALISM | A0 | KIGALI TIMES | ONLINE | NYARUGENGE |
| NSENGIYUMVA VINCENT | 14 | HABYARIMANA DESIRE | M | PASTOR | A2 | AGAKIZA.O RG | ONLINE | KICUKIRO |
| NZEYIMANA VIATEUR | 15 | ALPHONSE MUHIRE MUNANA | M | JOURNALISM | A0 | ISANGO STAR | BROADCAST | NYARUGENGE |
| NZEYIMANA VIATEUR | 16 | NKUNDIMANA NOEL | M | FINANCE | A0 | RADIO UMUCYO | COMMUNIT Y BASED MEDIA | NYARUGENGE |
| NZEYIMANA VIATEUR | 17 | BIHIBINDI NUHU | M | JOURNALISM | A0 | VOICE OF AFRICA | COMMUNIT Y BASED MEDIA | NYARUGENGE |
| NZEYIMANA VIATEUR | 18 | 0788473139 | M | JOURNALISM | PHD | VOICE OF HOPE | COMMUNIT Y BASED MEDIA | GASABO |
| NZEYIMANA VIATEUR | 19 | NTAMUHANGA CASSIEN | M | CHIEF MANAGER | - | AMAZING GRACE | COMMUNIT Y BASED MEDIA | NYARUGENGE |
| NZEYIMANA VIATEUR | 20 | LOUIS B KAMANZI | M | PROF ADMINISTRATOR | A0 | FLASH FM | BROADCAST | GASABO |
| NZEYIMANA VIATEUR | 21 | BADEGE ALOYS | M | PUBLIC ADMINISTRATION | AO | RESTORE/SA NA RADIO | COMMUNIT Y BASED MEDIA | KICUKIRO |

APPENDIX VI : MAIN CONSULTANTS FOR THIS REPORT

MHC TEAM

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- MUJYAMBERE JEAN PIERRE, *Ethics and Standards Liaison Officer*

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- RWABUNEZA ANASTASE, *Bachelor in Communication Sciences*
- MAHORO REDEMPTA, *Bachelor in Mathematics and Statistics*
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*We are thankful to all of you and to everyone
who has helped our team to accomplish this task and
who participated in the validation meeting
held in Lomigo Hotel Kigali at 22th April 2014*
