

RWANDA MEDIA BAROMETER



2016

RMB 2016 Edition

Score by indicator	
1	A system of regulation conducive to freedom of expression ,pluralism and diversity of the media 82.18
2	Plurality and diversity of media, a level economic playing field and transparency of ownership 62.2
3	Media as a platform for democratic discourse 75.7
4	Professional capacity building and supporting institution that underpin freedom of expression 59.4
5	Economic development levels and infrastructure capacity to support independent and pluralist media 71.0
6	Level of commitment among media practitioners to journalist professional codes of conduct and rate of compliance with media related legal provisions 71.4
7	Media availability (and access to information for citizens) 65.8
Overall Score 69.6%	

Color Code		
Response option	Score	Perception value
Inexistent/very low performance	0.0–1.9	0%–20%
Low performance	2.0–2.9	21%–40%
Moderate performance	3.0–3.9	41%–60%
High performance	4.0–4.9	61%–80%
Very high performance	5.0	81%–100%

Foreword

It gives us pleasure and honour to present the Rwanda Media Barometer (RMB) 2016. The RMB was introduced by the media reforms of 2012, as an initiative meant to regularly assess the state of media development in Rwanda, in order to identify existing gaps and devise measures to address them. This will enable a vibrant media sector that is free, professional, responsible, and profitable. It is also important to note that the media sector has the social responsibility to contribute to the economic and democratic development of the country through constructive engagements with citizens, civil society organizations, private sector and government institutions.

This second edition of RMB measures the overall state of media development in Rwanda at 69.6%, from 60.7% scored in the first edition published in 2013. This improvement of 8.9% reflects the positive impact brought about by the media reforms undertaken by the Government of Rwanda in 2012.

The amendment of the media law, migration from analogue to digital system of broadcasting and availability of affordable internet created a conducive environment for increased private investment in the media sector, leading to a drastic rise in the number of televisions, radio stations and online publications. The evidence on the ground, also reflected in this report, indicates that the expansion of media availability since 2013 has significantly increased media rights and freedoms in the county. It is worth noting that most of the media outlets are owned by private investors, communities and civil society organizations. And as a result of the introduction of the Access to Information Law, the score of the indicator on “Media availability and access to information for citizens” registered an increase of over 10%, from 55.2% in 2013 to 65.8% presently.

It gives us confidence that the findings and recommendations of the RMB 2016 will continue to serve as a reference to all media stakeholders to identify priority areas and inform intervention actions meant to support the development of a vibrant and responsible media sector in Rwanda. One UN - Rwanda has been a key partner of the Government of Rwanda in implementing media reforms and is happy to continue working with RGB, other government institutions and media organisations to support the sector development. We congratulate the media fraternity and all other stakeholders, individuals and institutions, who contributed to the production of RMB 2016.

Prof. SHYAKA Anastase
Chief Executive Officer
Rwanda Governance Board

Dr. Lamin M. Manneh
UN Resident Coordinator &
UNDP/ Resident Representative



On behalf of the Media High Council, I commend the research findings as they are useful for assessing Media Development in terms of professionalism, media freedom, access to information and pluralism of the media. The findings are tangible facts that illustrate how the media are contributing to speeding up the development of the country.

Peacemaker MBUNGIRAMIHIGO/ Executive Secretary/ The Media High Council



Rwanda Media Self-Regulatory Body appreciates the Rwanda Media Barometer 2016 Edition as a home grown analysis of the media landscape in Rwanda. We believe that the findings will serve as a practical guiding tool towards greater achievements of media reforms and sector development. Considering the role of the Media Self-Regulatory Body in media sector development which is principally to ensure the ethical performance of the media, we believe that

the findings will guide all stakeholders to join efforts towards addressing the interconnected factors leading to the ethical performance of media in general.

Cléophas BARORE/Ag. Chairman/The Media Self-Regulatory Body



It is five years since Rwanda embarked on a journey to carry out numerous media reforms. The notable ones include shifting from statutory regulation to self-regulation; enacting the access to information law and transforming the state broadcaster (ORINFOR) into a public broadcaster. There is no doubt that the ongoing reforms have paid off. There is a lot worth celebrating as you will discover in the 2016 media barometer. The goals of the reforms are taking root and like any other journey, success does not come over night. As the barometer indicates, a lot more needs to be done to build the capacity of media professionals if we are to fully

benefit from the spirit of the reforms. Thanks to the media barometer, the foundation for assessing progress in this noble sector has been firmly laid.

Collin HABA/Chairman/ Rwanda Journalists Association

Acknowledgement

We warmly acknowledge all those whose role was vital in successfully producing and publishing this barometer. Sincere and special appreciation goes to all partners who have supported Media development initiatives in Rwanda.

We also extend acknowledgement to Dr. Kayumba Christopher, the managing consultant of MGC Consult Ltd, a private firm that conducted the study. The entire team of consultants, researchers, data processors, proof readers and all the support staff, your tremendous effort is pretty much appreciated. We also take this opportunity to recognize that this was a collective endeavor by RGB, MHC, ARJ and the Media Self-Regulatory Body.

We express sincere gratitude to a wide range of participants including public officials, media practitioners, members of civil society organizations, and all citizens who provided data constituting the findings of this study.

We are looking forward to further collaboration in conducting the third edition of the RMB and any other research work.

Table of Content

Foreword.....	III
Acknowledgement.....	V
Table of content.....	VI
List of Tables.....	VII
List of Figures.....	IX
Acronyms and Abbreviations.....	X
Executive Summary	XI
Key Findings.....	XIII
Comparing 2016 with the 2013 Media Barometers: where is progress?.....	XIV
PART ONE: BACKGROUND AND METHODOLOGY.....	1
CHAPTER I: RWANDA’S MEDIA LANDSCAPE.....	1
I.1 General Background.....	1
I.2 Research Objectives.....	4
CHAPTER II: METHODOLOGY.....	6
II.1 Analytical framework.....	6
II.2 Approaches and methods.....	7
II.3 Data collections tools.....	8
II.4 Sampling strategy and sample size.....	9
II.5 Data collection.....	13
II.6 Recruitment and training of enumerators and team leaders.....	13
II.7 Data processing, analysis, interpretation and presentation.....	14
PART TWO: DEMOGRAPHIC CHARACTERISTICS AND DATA PRESENTATION.....	17
CHAPTER III: GEOGRAPHIC CHARACTERISTICS OF RESPONDENTS.....	17
III.1 Respondents by province and districts.....	17
III.2 RESPONDENTS’ DEMOGRAPHIC CHARACTERISTICS.....	18
CHAPTER IV: A SYSTEM OF REGULATION CONDUCTIVE TO FREEDOM OF EXPRESSION, PLURALISM AND DIVERSITY OF THE MEDIA.....	22
IV.1 Overview of Rwanda’s legal and policy environment in actuality.....	22
VI.2 Citizens’ awareness of their right to freedom of expression.....	25
VI.3 Media Freedom is guaranteed by law and respected in practice.....	26
IV.4 The right to information is guaranteed by law and respected in practice.....	27
IV.5 Journalists right to protect their sources.....	27
IV.6 Editorial independence is guaranteed by law and respected in practice.....	27

IV.7 Public and Civil Society organisations’ right to participate in shaping public policy towards the media.....	28
CHAPTER V: PLURALITY AND DIVERSITY OF MEDIA, LEVEL ECONOMIC PLAYING FIELD AND TRANSPARENCY OF OWNERSHIP.....	29
V.1 State ensures compliance with measures to promote pluralist media.....	29
V.2 State takes positive measures to promote pluralist media.....	29
V.3 Independent and transparent regulatory system in frequency allocation.....	31
V.4 State and CSOs actively promote the development of community media.....	32
V.5 State plan for spectrum allocation ensures optimal use for the public interest.....	32
V.6 Independent and transparent regulatory system in media licensing.....	33
V.7 State uses taxation and business regulation to encourage media development in a non-discriminatory manner.....	33
V.8 The State does not discriminate through advertising policy.....	33
V.9 Diversity is reflected in the content of both print and broadcast media....	33
CHAPTER VI: MEDIA AS A PLATFORM FOR DEMOCRATIC DISCOURSE.....	34
VI.1 Media as platform for democratic discourse: an overview.....	34
VI.2 Public, private and community Media serve the needs of all groups in society.....	36
VI.3 Media organisations promote the principle of unity and reconciliation of the Rwandan people.....	37
VI.4 Media organisations promote the principle of gender equality.....	38
VI.5 Media organisations contribute to the fight against corruption.....	39
VI.6 Media practitioners can practice their profession in safety.....	41
VI.7 Media organisations are responsive to public perceptions of their work.....	41
CHAPTER VII: PROFESSIONAL CAPACITY BUILDING AND SUPPORTING INSTITUTIONS THAT UNDERPIN FREEDOM OF EXPRESSION.....	43
VII.1 Media professionals access training appropriate to their needs.....	45
VII.2 Journalist who have had opportunities to further develop their skills as media practitioners or specialise in a particular area.....	45
VII.3 Media managers, including business managers’ access to training, appropriate to their needs.....	46
VII.4 Training equips media professionals with skills to report democracy and development.....	47
VII.5 Academic courses equip students with skills and knowledge to contribute to democratic development.....	47
VII.6 Media workers have the right to join independent trade unions and exercise this right.....	48
VII.7 Trade unions and professional associations provide advocacy on behalf	

of the profession.....	48
VII.8 CSOs monitor the media systematically.....	48
VII.10 CSOs help communities access information and get their voices heard.....	48
VII.11 Media meet professional standards of quality.....	49
VII.12 Media practitioners work in economically stable conditions.....	49
CHAPTER VIII: ECONOMIC DEVELOPMENT LEVEL AND INFRASTRUCTURE CAPACITY SUFFICIENT TO SUPPORT INDEPENDENT AND PLURALIST MEDIA..	50
CHAPTER IX: LEVEL OF COMMITMENT AMONG MEDIA PRACTITIONERS TO JOURNALIST PROFESSIONAL CODE OF CONDUCT AND RATE OF COMPLIANCE TO MEDIA LEGAL PROVISIONS.....	52
IX.1 Print and broadcast media have effective mechanisms of self-regulation and display a culture of self-regulation.....	52
IX.2 Existence of mechanisms of self-regulation at media house level.....	54
CHAPTER X: MEDIA AVAILABILITY AND ACCESS TO INFORMATION FOR CITIZENS.....	56
X.1 Proportion of citizens who access both print and broadcast media.....	56
X.2 Accessibility to media facilities.....	57
X.3 Citizens’ perception of affordability of selected media facilities/ equipment.....	58
X.4 Type of Media from which citizens got news/information in the last 12 months.....	59
X.5 Social Media used by citizens to get information about the country’s life.....	60
CHAPTER XI: CONCLUSION AND RECOMMENDATIONS.....	62
REFERENCES.....	68

List of Tables

Table 1: Summary of Rwanda Media Barometer 2016 Edition.....	XV
Table 2: Comparing 2016 Edition with 2013 barometer findings by indicators and sub-indicators.....	XVIII
Table 3: sample size for journalists, business community and NGOS.....	10
Table 4: Numbers of focus groups and key informants’ interviews.....	10
Table 5: distribution of the sample per province and district.....	12
Table 6: Scoring scale.....	15
Table 7: Number of respondents by provinces and districts.....	17
Table 8: Characteristics of respondents–category, gender, age, residence, level of education.....	19
Table 9: Respondents’ perception on a system of regulation conducive to free expression, media freedom.....	26
Table 10: Respondents perception of plurality and diversity of media, a level	

playing field and transparency of ownership.....	31
Table 11: Media as platform for democratic discourse.....	35
Table 12: public, private and community media serve the needs of all groups in society.....	36
Table 13: Media organisations promote the principle of unity and reconciliation.....	38
Table 14: Media organisations comply with the principle of gender equality through their programs.....	39
Table 15: Media organisations contribute to the fight against corruption.....	40
Table 16: Journalists, media personnel and organisations can practice their profession in safety.....	41
Table 17: Media organisations are responsive to public perceptions of their work.....	42
Table 18: Respondents' perception about capacity building and institutions that underpin freedom of expression.....	44
Table 19: Journalists who have had opportunities to further develop their skills.....	46
Table 20: Media managers who have had any of the following opportunities.....	47
Table 21: Media organisations have access to modern technical facilities for news gathering, production and distribution.....	51
Table 22: Print and broadcast media have effective mechanisms of self- regulation and display a culture of self-regulation.....	53
Table 23: Effective broadcast code setting out requirements for fairness, balance and impartiality.....	54
Table 24: Existence of mechanisms of self-regulation at media house level.....	55
Table 25: Proportion of citizens to whom both print and broadcast media are available.....	56
Table 26: Proportion of respondents' households with access to selected media facilities/equipment.....	58
Table 27: Citizens' perception of affordability of selected media facilities/ equipment.....	59
Table 28: type of media citizens used to get news/information in the last 12 months: Comparing 2013 with 2016 Edition.....	60
Table 29: Social Media used by citizens to get informed about the country's life.....	61
Table 30: Summary of challenges, gaps and recommendations.....	65

List of Figures

Figure 1: RMB2016 Edition Main Stakeholders.....	7
Figure 2: Citizens' Sample Stratification Diagram.....	11
Figure 3: Citizen's awareness of their right to freedom of expression.....	25

Acronyms and Abbreviations

- 1) ARJ: Rwanda Journalists Association
- 2) BC: Business community
- 3) CSOs: Civil Society Organisations
- 4) FGDs: Focus Group Discussions
- 5) GLMC: Great Lakes Media Center
- 6) I.E.: That is
- 7) IT: Information Technology
- 8) KIIs: Key Informant Interviews
- 9) MGC: Media, Governance and Communications
- 10)MHC: Media High Council
- 11)NISR: National Institute of Statistics
- 12)ORINFOR: Office Rwandais d'Information (National Office for Information)
- 13)PBs: Public Broadcasting Services
- 14)RGB: Rwanda Governance Board
- 15)RMB: Rwanda Media Barometer
- 16)RURA: Rwanda Utilities Regulatory Authority
- 17)SJC: School of Journalism and Communication
- 18)SPSS: Statistical Package for Social sciences
- 19)UNESCO: United Nations Education, Scientific and Communication Organisation
- 20)UR: University of Rwanda.

Executive Summary

This is the second edition of the Rwanda Media Barometer (RMB). The first edition, (which provided baseline data) was published in 2013. A homegrown initiative, the instrument measures media development in the country from the perceptions and lived experiences of different stakeholders—including ordinary citizens, media practitioners, members of civil society organisations (CSOs), the business community, public officials, development partners and media experts. Specific objectives of this initiative are:

- To use appropriate and scientific research tools to comprehensively measure the status of media focusing on national values such as freedom of expression and international best practices;
- Contribute to a deeper scientific understanding of media development through gathering and discerning the perceptions of media consumers as well as other indicators of media development like the nature and contribution of the legal and policy environment, access to information; et cetera;
- Discern media progress in the country in the last 2-3 years and compare this with the RMB 2013 to clarify improvement, gaps and challenges possibly impeding the desired rate of development;
- Gather information on media development and access to information from all media sectors including, but not limited to television , radio, print , the internet ,media platform and other forms of media;
- Identify skills available that move the sector forward as well skills’ gaps;
- Establish the probable impact of media reforms with particular focus on the access to information law; media self-regulation and the transformation of the state-owned ORINFOR into a public broadcaster (RBA);
- Identify projects implemented by media institutions and associated successes and challenges in the implementation process and;
- Make recommendations geared towards moving media development in the country forward.

To achieve these objectives, the study used a mixed research methodology—combining both quantitative and qualitative methods of gathering and analysing

data. Data was collected through a national survey of 3000 respondents. Of these, 2400 are ordinary citizens, 200 journalists; 200 business people and 200 CSOs. All these responded to a structured questionnaire. The questionnaire was complemented by conducting informative interviews and focus group discussions and arising data analysed thematically.

In all, seven broad indicators of media development are measured. These are informed by international standard of measuring the phenomenon as well as other identified contextual conditions and national values. The indicators measured are:

- a) A system of regulation conducive to freedom of expression, pluralism and diversity of media;
- b) Plurality and diversity of media, a level economic playing field and transparency of ownership;
- c) Media as a platform for democratic discourse;
- d) Professional capacity building and supporting institutions that underpin freedom of expression;
- e) Economic development levels and infrastructure capacity to support independent and pluralist media;
- f) Level of economic commitment among media practitioners to the journalism professional codes of conduct and the rate of compliance with media related legal provisions; and,
- g) Media availability and access to information for citizens

Key Findings

Study findings indicate that, overall, the level of media development in the country stands at 69.6% (up from 60.7% in 2013 when the first media barometer was published). This represents an upward improvement of 8.9%—a figure also evidentially justified by the number of media outlets started since; laws enacted; the start of media self-regulation; among other factors as discussed in chapters 3-10. The first indicator i.e. “a system of regulation conducive to freedom of expression, pluralism and diversity of media” scored higher than any other indicator, standing at 82.18%. The second indicator i.e. “plurality and diversity of media, a level economic playing field and transparency of ownership” stands at 62.2%. Further, indicator number three, i.e. “Media as a platform for democratic discourse” scored 75.7% overall; and indicator four, “professional capacity building and supporting institutions that underpin freedom of expression” scored 59.4%—which also constitutes the weakest dimension of media development in this study. Indicator five i.e. “Economic development levels and infrastructure capacity to support independent and pluralist media” is represented by 71.0% while indicator six i.e. the “Level of economic commitment among media practitioners to the journalism professional codes of conduct and the rate of compliance with media related legal provisions” stands at 71.4%—this is the second highest score while indicator Seven i.e. “Media availability and access to information for citizens” scored 65.8%. This means that while the number of media outlets has increased, citizens still feel they are less involved as news sources. An access to information law was enacted in 2013 and there are ongoing efforts to popularise it, many citizens are yet to know about it and use it.

Comparing 2016 with the 2013 Media Barometers: where is progress?

First, as indicated above, the overall level of media development in the country is perceived to be higher now than it was in 2013 (with an increase of 8.9 percentage points). Secondly, indicator One improved from 71.5% in 2013 to 82.18%. This constitutes an increment of 10.68 percentage points while indicator Two improved from 50.4% to 62.2%. Likewise, indicator Three moved from 67.1% to 75.7% and indicator Four climbed from 51.9% to 59.4%. This improvement in perceptions is also seen in indicator Five which jumped from 68.1% to 71.0% while indicator Six which is new stands at 71.4%. Indicator Seven which was indicator six in 2013 Barometer improved from 55.2% to 65.8. Most of the substantive explanation for these improved perceptions relate to the effect of the reforms that started in 2013 leading to the review of the media law; the creation of the self-regulation mechanism, the transformation of the state broadcaster to a public broadcaster, enacting access to information law and the increment of media outlets; especially television and radio stations as well as the increase in the web-driven media outlets and increased use of social media platforms and accessing news and information through telephony—a phenomenon that is expanding.

Table 1: Summary of Rwanda Media Barometer 2016 Edition

A system of regulation conducive to freedom of expression, pluralism and diversity of the media								82.18				
1	Freedom of expression is guaranteed by law and respected in practice	90.5	Media freedom is guaranteed by law and respected in practice	78.7	The right to information is guaranteed by law and respected in practice	85.2	Editorial independence is guaranteed by law and respected in practice	90.5	Journalists' right to protect their sources is guaranteed by law and respected in practice	81.2	The public and civil society organisations (CSOs) participate in shaping public policy towards the media	52.0
Plurality and diversity of media, a level economic playing field and transparency of ownership								62.2				
2	State takes positive measures to promote pluralist media	62.1	State ensures compliance with measures to promote pluralist media	60.9	Independent and transparent regulatory system in frequency allocation	65.7	State and CSOs actively promote development of community media	63.5	State plan for spectrum allocation ensures optimal use for the public interest	53.5	Independent and transparent regulatory system in media licensing	63.3
	State uses taxation and business regulation to encourage media development in a non-discriminatory manner	71.2	State does not discriminate through advertising policy	45.7	Diversity is reflected in the content of both print and broadcast media	72.4						

	training appropriate to their needs	and development	democratic development	and exercise this right	behalf of the profession		
	CSOs provide direct advocacy on issues of freedom of expression	CSOs help communities access information and get their voices heard	Media meet professional standards of quality	Media practitioners work in economically stable conditions			
	CSOs monitor the media systematically						
	47.0	47.0	48.6	64.2	67.4	71.0	
5	Economic development levels and infrastructure capacity to support independent and pluralist media						71.0
	Media organisations have access to modern technical facilities for news gathering, production and distribution						71.0
	Level of commitment among media practitioners to journalist professional codes of conduct and rate of compliance with media related legal provisions						71.4
6	Print and broadcast media have effective mechanisms of self-regulation	Media displays culture of self-regulation	Effective broadcasting code setting out requirements for fairness, balance and impartiality	Effective enforcement of broadcasting code	The public displays high levels of trust and confidence in the media		
	65.6	71.6	74.6	76.2	67.3		
	Media availability (and access to information for citizens)						65.8
7	Both print and broadcast media and related facilities are available to citizens	Both print & broadcast media and related facilities are accessible to citizens					
	66.5	65.0					

Table 2: Comparing 2016 Edition with 2013 barometer findings by indicators and sub-indicators

YEAR		2013				2016 Edition				
RESPONDENTS CATEGORY		Journalists (%)	CSOs (%)	Citizens (%)	Overall (%)	Journalists (%)	CSOs (%)	Citizens (%)	Business Community (%)	Overall (%)
1. A system of regulation conducive to freedom of expression, pluralism and diversity of the media		66.1	62.3	89.5	71.5	79.3	78.9	81.3	89.2	82.18
	1.1. Freedom of expression is guaranteed by law and respected in practice			89.3	89.3	97.9	94.2	80.5	89.4	90.5
	1.2. Media freedom is guaranteed by law and respected in practice	72.0			72.0	78.7				78.7
	1.3. The right to information is guaranteed by law and respected in practice	74.3		89.7	74.3	79.2	90.7	82.1	88.9	85.2
	1.4. Editorial independence is guaranteed by law and respected in practice	66.4			66.4	90.5				90.5
	1.5. Journalists' right to protect their sources is guaranteed by law and respected in practice	82.7			82.7	81.2				81.2
	1.6. The public and civil society organisations (CSOs) participate in shaping public policy towards the media	35.3	62.3		48.8	52.1	51.8			52.0
2. Plurality and diversity of media, a level economic playing field and transparency of ownership		54.5	32.2	52.4	50.4	63.7	55.6	67.2		62.2
	2.1. State takes positive measures to promote pluralist media	50.2			50.2	67.4	51.8	67.2		62.1
	2.2. State ensures compliance with measures to promote pluralist media			50.7	50.7	60.9				60.9
	2.4. Independent and transparent regulatory system in frequency allocation	57.3			57.3	65.7				65.7

2.5. State and CSOs actively promote development of community media		33.6		33.6	69.2	57.8			63.5
2.6. State plan for spectrum allocation ensures optimal use for the public interest	42.4	30		36.2	55.2	51.8			53.5
2.7. Independent and transparent regulatory system in media licensing	57.3			57.3	65.7	60.9			63.3
2.8. State uses taxation and business regulation to encourage media development in a non-discriminatory manner	70.0			70.0	71.2				71.2
2.9. State does not discriminate through advertising policy	35.6			35.6	45.7				45.7
2.11. Diversity is reflected in the content of both print and broadcast media	65.7			65.7	72.4				72.4
3. Media as a platform for democratic discourse	68.2	72.1	63.4	67.1	70.2	82.5	71.9	78.3	75.7
3.1. The media – public, private and community-based – serve the needs of all groups in society			39.9	39.9			54.4		54.4
3.2. Media organisations ensure their social responsibility by complying with the principle of unity and reconciliation of the Rwandan people		80.5	80.6	80.5	78.0	81.3	83.4	86.1	82.2
3.3. Media organisations ensure their social responsibility by complying with the principle gender equality through their content		81.5	79.5	80.5	69.0	82.8	81.6	82.2	78.9
3.4. Media organisations ensure their social responsibility by complying with the principle anti-corruption practices in their work		67.1	74.8	69.6	72.1	83.3	77.1	76.7	77.3
3.5. The goals of public service broadcasting (PSB) are legally defined and guaranteed					100.0				100.0

3.6. The operations of public service broadcasters do not experience discrimination in any field							74.4	68.3	71.4
3.7. Independent and transparent system of governance					59.8				59.8
3.8. PSBs engage with the public and CSOs		57.4	54.8	57.4	52.3		60.2		56.3
3.9. Media organisations are responsive to public perceptions of their work	83.4		40.4	61.9	78.8				78.8
3.10. Journalists, associated media personnel and media organisations can practice their profession in safety	61.2			61.2	70.6				70.6
4. Media development, professional capacity building and supporting institution that underpins media freedom	54.9	51.0	44.9	51.9	63.4	52.8	52.2	63.7	59.4
4.1. Media professionals access training appropriate to their needs	56.3			56.3	39.0				39.0
4.2. Media managers, including business managers, access training appropriate to their needs	27.8			27.8	60.3				60.3
4.3. Training equips media professionals with skills to report democracy and development	54.4			54.4	67.5				67.5
4.5. Academic courses equip students with skills and knowledge to contribute to democratic development	62.6			62.6	81.5				81.5
4.6. Media workers have the right to join independent trade unions and exercise this right	65.7			65.7	66.6				66.6
4.7. Trade unions and professional associations provide advocacy on behalf of the profession	62.5			62.5	71.3				71.3
4.8. CSOs monitor the media systematically		53.5		53.5		47.0			47.0
4.9 CSOs provide direct advocacy on issues of freedom of expression		36.1		36.1		47.0			47.0

	4.10. CSOs help communities access information and get their voices heard		51.4	27.5	39.5	57.5	48.6	39.7		48.6
	4.11. Media meet professional standards of quality		63.1	62.3	62.7	59.8	68.7	64.6	63.7	64.2
	4.12. Media practitioners work in economically stable conditions					67.4				67.4
5. Economic development levels and infrastructure capacity to support independent and pluralist media		68.1			68.1	71.0				71.0
	5.1. Media organisations have access to modern technical facilities for news gathering, production and distribution	68.1			68.1	71.0				71.0
6. Level of commitment among media practitioners to journalist professional codes of conduct and rate of compliance with media related legal provisions						70.4	71.4	71.1	72.8	71.4
	6.1. Print and broadcast media have effective mechanisms of self-regulation				64.3	66.7	64.9	67.1	72.7	67.8
	6.2. Media displays culture of self-regulation					71.6				71.6
	6.3. Effective broadcasting code setting out requirements for fairness, balance and impartiality				68.6	69.5	75.0	78.8	74.9	74.6
	6.4. Effective enforcement of broadcasting code					73.9	74.4	73.7	82.7	76.2
	6.5. The public displays high levels of trust and confidence in the media				69.7			64.7	69.8	67.3
7. Media availability (and access to information for citizens)				55.2	55.2			65.8		65.8
	7.1. Both print and broadcast media and related facilities are available to citizens			55.2	55.2			66.5		66.5
	7.2. Both print and broadcast media and related facilities are accessible to citizens							65.0		65.0

Source: Primary data and the 2013 Rwanda Media Barometer (RGB, 2013, ISSN: 2307-2423)

PART ONE: BACKGROUND AND METHODOLOGY

Chapter I: Rwanda's Media Landscape

I.1 General Background

The Rwanda Media Barometer 2016 Edition (RMB 2016 Edition) is the second such instrument that tracks and measures media development in the country; the first was published in 2013¹. The former therefore builds on the baseline findings of the latter, focusing on progress in the media sector in the past two years, identifying gaps and challenges from the perceptions and lived experiences of ordinary citizens, media practitioners, members of civil society organizations (CSOs), the business community, relevant government officials, development partners and media experts. The primary objective of this instrument is to develop a rounded understanding of the developments in the sector as a whole so as to inform policymaking and guide investment in the sector; particularly with regard to areas that require improvement.

From a legal, policy and operational standpoint, Rwanda's current media landscape was laid by the first post-genocide media law of 2002² and subsequent policy that liberalised the sector following eight years of sustained debate about what type of media the country needed and how to attain such media. By the time that law and policy were adopted, there was only one state-owned radio and television station, one school of journalism and a few print media outlets. Today, there are 35 radio stations, twelve television stations, about 50 print media outlets—including two daily newspapers; over 80 web-based media outlets; a number of media associations; including a media self-regulatory body and three schools of journalism and communication—including the School of Journalism and Communication (SJC) at the University of Rwanda (UR), Kabgayi University's Department of Journalism and Communication and Mount Kenya University's Department of Journalism and Communication.

Besides the increase in the number of media outlets and schools of journalism as demonstrated by the Rwanda Media Barometer 2013³, the legal and policy environment has substantially improved especially since the media reform initiated in the media policy of 2011 that transformed a state-run radio and television (Orinfor) into a public broadcaster and the Cabinet Decision of March 30, 2011 that endorsed media self-regulation that empowered journalists themselves to regulate their trade while the Media High Council (MHC)'s mandate was redefined away from media regulation to media capacity development. With these developments, the 2013 media barometer showed

1 See Rwanda Media Barometer, 2013, RGB, ISSN: 2307-2423

2 See Press Law N° 18/2002 of 11/05/2002

3 See Rwanda Media Barometer, 2013, RGB, ISSN: 2307-2423

improvement in the sector as shall be discussed later but since the reforms were still in progress, their impact was still work in progress. The media barometer 2016 Edition, therefore, aimed, in part, to discern the effect of the aforementioned reform, what they have specifically achieved, the challenges and how they can be addressed.

Further, since media development is more than putting in place the relevant infrastructure, laws and increase of media outlets, the RMB 2016 Edition, also aims to discern the perceptions of media consumers especially as far as the quality of content aired, published or telecast is concerned as well as the extent to which access to information law has created an environment conducive for free access to information and the extent to which the public broadcaster truly works in the interest of the citizenry as is other public media outlets. And since media stakeholders and development is more than ordinary consumers but also includes journalists, media owners and the business community, the RMB 2016 Edition also seeks the perception and view of these stakeholders as well as members of the civil society organisations.

In terms of approach therefore, this barometer adopted a rigorous method that broadly traces developments in the media sector as a whole since the 2013 RMB (that provided the indicator framework and baseline data on the sector), while, at the same time, gathering perceptions; deepening understanding of the sector and identifying challenges that need to be addressed to ensure sustained progress. This means that the resulting findings provide reliable contextual and institutional conditions, facts, figures and perceptions about media development in the country since 2013.

In sum, findings in this media barometer are derived from qualitative as well as quantitative data gathering methods and analysis. Like that used in the 2013 barometer, the analytical framework enabled the mapping and understanding of contextual and institutional conditions that affect the media sector, the general environment relating to the nature and quality of media and access to information laws, media policy, political, institutional, economic and cultural conditions under which the media operate, the social conditions and the perceptions of ordinary citizens, journalists; members of civil society organizations and the Business community. To this extent, therefore, the word methodology was in this study used in a broader sense to encompass the indicator framework underpinning the study⁴, methods of data collection and analysis as well as the ethical practices that guided the study and everyone involved in it—such ensuring the anonymity of respondents and not attributing a view to the specific name of the informant, among other issues (Ackerly, Stern, & True, 2006).

4 Relating to concepts such as media development, and media freedom

In terms of how to discern progress, gaps and challenges, the media barometer 2016 edition is an in-depth and comprehensive instrument built on seven (7) indicators informed largely by the 2013 media barometer indicators and UNESCO's Media Development Indicator Framework⁵. In addition, the barometer also takes into account contextual conditions derived from the Rwanda media legal framework and the country's socio-political context. These are also the same dimensions that were relied upon to develop the RMB2013⁶ and the 2016 edition barometer, therefore, builds on these earlier barometer findings and will, therefore, discern progress since the first barometer by way of comparison along dimensions and indicators. These indicators are: (1) a system of regulation conducive to freedom of expression, pluralism and diversity of media; (2) Plurality and diversity of media, a level economic playing field and transparency of ownership; (3) media as a platform for democratic discourse; (4) professional capacity building and supporting institutions that underpin freedom; (5) economic development levels and infrastructure capacity to support independent and pluralist media; (6)⁷ level of economic commitment among media practitioners to journalism professional codes of conduct and the rate of compliance with media related legal provisions; and (7) media availability and access to information. These indicators are further divided into sub-indicators and specific variables that are empirically and operationally coded and measured to tell us, in terms of numbers, where progress lies and where challenges are located.

Since the media is a cross-cutting sector where multiple beneficiaries, interest groups and developers converge, the findings from this exercise will help policy makers and investors to better understand the sector and where intervention is needed. This also means that this instrument will also help the media fraternity that is charged with self-regulation and improving conditions under which media practitioners work as well as civil society organisations and development partners engaged in the development and improvement of the media sector.

5 UNESCO, Media Development Indicators: A framework for assessing media development, Paris, 2008, available at <http://unesdoc.unesco.org/images/0016/001631/163102e.pdf>

6 While the 2013 Rwanda Media Barometer was built on six indicators, the 2016 edition is built on seven;. See Indicator Framework, Annex I

7 This indicator is new and was introduced following recommendations from 2003 Barometer

I.2 Research Objectives

I.2.1 General objectives

The general objective of the media barometer is to gather quantitative data—by way of a survey as well as qualitative data tracking and measuring media development in the country since the first media barometer in 2013. The aim of this is to develop an in-depth and comprehensive understanding of the progress the sector has made since, the remaining gaps and challenges so as to inform policy and interventions in the sector from different stakeholders; including government, CSOs and development partners. As will be presented and discussed in the next chapter, this understanding is developed through collection of institutional data as well as experiences and the perceptions of different media consumers and stakeholders—such as ordinary citizens, the business community, journalists, media managers, media experts, some government officials in charge of the sector, development partners as well as members of CSOs.

I.2.2 Specific objectives

- i) Use appropriate and scientific research tools to comprehensively measure the status of media with regard to national values such as freedom of expression and international best practices;
- ii) Contribute to a deeper scientific understanding of media development through gathering and discerning the perceptions of media consumers as well as other indicators of media development such as the nature and contribution of the legal and policy environment, access to information; et cetera;
- iii) Identify media progress in the country in the last 3 years and compare with the RMB 2013 to see improvement, identify gaps and examine challenges possibly impeding the desired rate of development;
- iv) Gather information on media development and access to information from all media sectors including, but not limited to television , radio, print , the internet, media platform and other forms of media;
- v) Identify skills available that move the sector forward as well skills gaps;

- vi) Establish the probable impact of media reforms with particular focus on the access to information law; media self-regulation and transforming the state-owned ORINFOR into a public broadcaster;
- vii) Make recommendations which will improve media development in the country.

Chapter II: Methodology

This chapter presents, discusses and justifies the methodology used to gather and analyses data for the Rwanda Media Barometer 2016 Edition. Before doing this, it is appropriate to clarify the concepts on which this barometer is scientifically premised—like “methodology”, “methods”, “analytical framework” and “barometer” itself are here used and how they should here be understood.

II.1 Analytical framework

This barometer is built on seven (7) indicators. These were extensively discussed and agreed upon by stakeholders—first in the process leading to the first media barometer in 2013 and after in lessons learned⁸. These dimensions are informed by UNESCO’s Media Development Indicator Framework⁹, international and regional protocols¹⁰ that Rwanda is signatory to; national laws—including the country’s constitution; Vision 2020 and other contextual conditions (The same dimensions—with the exception of one which was added later were used in the RMB2013. This means allowing measuring and understanding progress or decline of the sector by way of comparison). In that sense, RMB 2016 Edition builds on the baseline findings of the first barometer to discern progress, gaps, or challenges since. These dimensions and associated indicators form both the backbone of what we seek to understand here and what is therefore measured. The same dimensions, for example, freedom of expression, access to information, diversity of media, et cetera form the study’s analytical framework and are provided in the figure below.

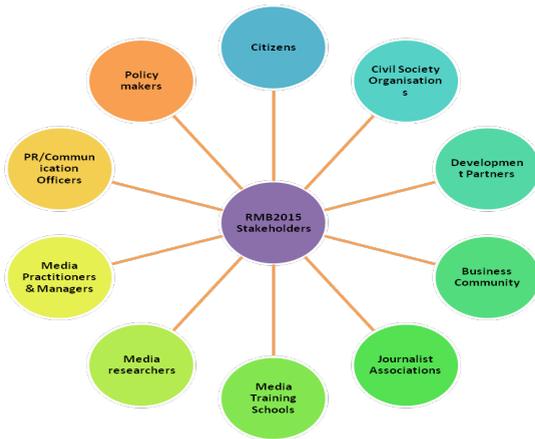
In order to develop a rounded understanding of media development along the above indicators, a survey was carried out. The survey targets individuals, institutions, civil society organisations(CSOs), media practitioners, business community members, academia, that have the legitimacy to objectively assess the state of media development in Rwanda given that they assumingly have the knowledge on key dimensions covered by this barometer.

8 See Rwanda Media Barometer 2013, RGB

9 UNESCO, Media Development Indicators: A framework for assessing media development, Paris, 2008, available at <http://unesdoc.unesco.org/images/0016/001631/163102e.pdf>

10 Such as the Universal Declaration of Human Rights of 1948, Chapter 19 on Freedom of Expression, the Civil and Political Rights of 1976, African Charter on Peoples’ Rights, and The Declaration of Principles on Freedom of Expression in Africa (2002)

Figure 1: RMB2016 Edition Main Stakeholders



II.2 Approaches and methods

As far as approaches to this study are concerned, a mixed methods approach and triangulation of data was adopted. This approach combines quantitative and qualitative methods of data collections and analysis. The rationale of using mixed methods approaches resides in the assumption that collecting diverse types of data best provides a comprehensive and deeper understanding of a research problem. As Bulsara puts it, *“The purpose of this form of research is that both qualitative and quantitative research, in combination, provides a better understanding of a research problem or issue than either research approach alone”*¹¹.

Following both approaches, the study begins with a survey to gather data that is relied upon to generalise results to a sample population and then focuses, in the second phase, on detailed qualitative, open-ended interviews and focus groups to collect detailed views from informants. The latter information facilitates a deeper understanding of the reasoning that is used to inform and explain numbers derived from the quantitative method¹². The former approach was instrumental in collecting quantitative data using a structured questionnaire, while the latter approach served to gather qualitative data and information using documentary analysis (literature review), key informant interviews (KIIs) and focus group discussions (FGDs). Data from this approach complement the first one by enabling interpretive insights behind quantitative data.

11 Bulsara , Caroline, Using a Mixed Methods Approach to Enhance and Validate your Research, available at https://www.nd.edu.au/downloads/research/ihrr/using_mixed_methods_approach_to_enhance_and_validate_your_research.pdf

12 Creswell, John W., op.cit. p.21

II.3 Data collections tools

a) Desk research

To develop a better understanding of media progress in the country, existing literature on media freedom, development and sustainability is reviewed. Besides, studies on media development and freedom, other key documents analysed include Rwanda's legal and policy frameworks, institutional reports, media development assessment and research reports, to name but a few. Some relevant documents analysed include the following, Rwanda Media Barometer 2013; Rwanda Governance Scorecard 2014; the 4th Rwanda Population and Housing Census 2012; the EICV4; EDPRS I and II; UNESCO's Media Development Indicators: A framework for assessing media development; among other documents.

b) Questionnaire

To collect quantitative data, a structured questionnaire was developed and administered to the sampled population/respondents including journalists, citizens, civil society organisations and members of the business community. In all, four types of questionnaires were involved, developed according to each of the above target audiences. For the sake of assuring consistency of the measurement tools and comparison of the findings to measure change over time, the questionnaire for RMB2016 Edition was largely informed by that used in RMB2013. However, given that the tools are not static, and based on the recommendations from the 2013 barometer, a seventh dimension was added. Perception of respondents towards the media in Rwanda is mainly measured through scale-questions (Likert scale); with experience related questions being largely of Yes or No type as annexe II shows.

c) Focus Group Discussions (FGDs)

In a bid to better comprehend quantitative data, two FGDs were conducted. These were organised into selected homogeneous groups such as journalists, public relations officers and/or communication officers in public institutions and CSOs representatives. For the purpose of effective facilitation and management of the groups, each FGD comprised of between 10 to 12 participants.

d) Key informant interviews (KIIs)

While questionnaires and FGDs, if well applied, yield valid and reliable data about the research problem, they may not always be deep enough to provide information from major categories of people concerned with the research problem. To understand contextual conditions under which journalists and media operate, interviews were conducted to complement other methods of data collection. Such interviews were conducted with selected government officials especially those that deal with media policy; media houses' managers/

owners, media experts, media practitioners, some diplomats and selected development partners. Besides the discussions on the overall state of media in Rwanda, KIIs interviews also focused on the role of different stakeholders in promoting media development in Rwanda.

II.4 Sampling strategy and sample size

As in any sampling plan of any study, this barometer attempted to answer a series of questions– such as what is the target population? What is the size of the sample needed or appropriate? What is the sampling technique to be used in selecting the sample? With the study objectives in mind, the study population for the RMB is multidimensional and largely described above.

a) Sample size

As with the RMB2013, the Rwanda Media Barometer 2016 Edition is a countrywide study-survey. This means that a couple of parameters are taken into account to determine the sample size for this rigorous exercise. These include the desired degree of precision, the target population size, the timing as well as the available budget. The sample to draw for the collection of quantitative data relates to four categories of the target population: These are (i) Citizens aged 18 and above; (ii) journalists; (iii) Representatives of civil society organisations and (iv) the business community members.

In the drawing of samples sizes, David Royse¹³ notes that “the use of 95% confidence level and 5% margin of error is a common standard” once the sample size has been determined. Based on the Fourth Population and Housing Census (2012), the Rwandan population aged 18 and above is 5,500,845 people. This being the most reliable data to date, and considering a margin of error (confidence interval) of 2%, a confidence level of 95% with a response distribution of 50%, the sample size for the citizens’ category is computed using the formula below:

$$n = \frac{N (z s / e)^2}{N - 1 + (z s / e)^2}$$

Where:

$z = 1.96$ for 95% level of confidence

$s = p (1-p)$ p = estimated proportion

e = the desired margin of error

N = population size

The sample size for RMB2016 Edition is therefore **2400 individuals** from the citizens’ category. As far as other categories are concerned, the sample sizes are provided below:

For the other categories of the population surveyed, the computation of their sample sizes¹⁴ is described in the table below:

13 Royse, D. (2008) Research Methods in Social Work, Thompson Learning Inc. p. 209, accessed at <https://books.google.rw/books?id=G0Rz2HQ4KnIC&pg=PA209&lpg=PA209&dq>

14 Raosoft.Inc. (2004) Raosoft sample size calculator, accessed at <http://www.raosoft.com/samplesize.html>

Table 3: sample size for journalists, business community and NGOs

Population	Population Size	Margin of error	Confidence level	Distribution level	Sample size
Total Journalists	570	5%	95%	50	200
Print media	135 (24%)				50
Online	93 (16%)				32
News Agency	1 (0%)				0
Radio	203 (36%)				78
Tv	85 (15%)				30
Freelance	53 (9%)				15
Business people	10629				200
NGOs	877	5%	95%	50	200

All in all, the total sample size for the RMB2016 Edition is **3000 individuals** (2400+200+200+200) stratified in four population clusters.

For the purpose of RMB2016 Edition, based on the tasks to be involved by the entire assignment, the timeframe and the budget, two FGDs were organised as shown in the table below:

Table 4: Numbers of focus groups and key informants' interviews

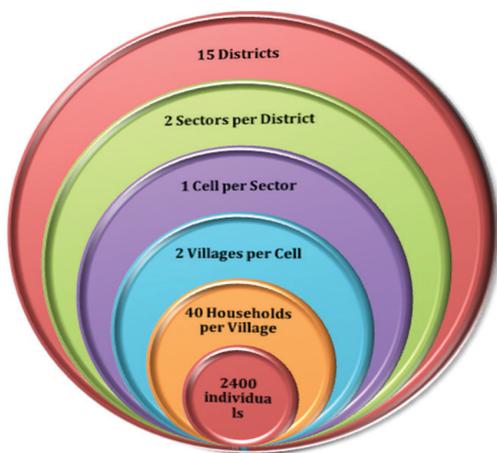
Method	Participants	Number/Size
FGDs	Media practitioners, editors, and managers	1
	CSOs, public relations officers and policymakers	1
	Total FGDs	2
KIIs	Policy/lawmakers	3
	Media regulatory bodies	3
	Media associations	4
	Media managers/owners	10
	Media experts (academia/research)	3
	Development partners & international NGOs	12
	Business Community members	6
	Total KIIs	41

b) Sampling strategy

A multistage sampling technique was used to select respondents from the citizens' category. This refers to a sample in which "*sampling is done sequentially across two or more hierarchical levels, such as first at the county level, second at the census tract level, third at the block level, fourth at the household level, and ultimately at the within-household level*"¹⁵. The RMB2016 Edition is a countrywide endeavour which resorted to this type of sampling of citizens' respondents.

From all the four provinces and the City of Kigali, a total of 15 districts (50% of all districts) was randomly selected. The number of districts to select from each province and the City of Kigali was proportionate to the size of the province population. From each of those districts two (2) sectors were randomly chosen and, one (1) cell drawn randomly from each of those sectors. At the cell level, two (2) villages were randomly selected and, from these villages 40 households were also randomly selected by choosing every Kth house from the village list of households. At the household level, one (1) member aged 18 or above was randomly chosen for interviews (questionnaire). While the updated list of administrative entities set by the NISR served in selecting sectors, cells and villages randomly, the lists of heads of households held by the heads of villages were also instrumental in selecting households randomly for interviews. Where such lists were not available in some villages, they were systematically developed on the spot by team leaders (chefs d'équipe) in collaboration with heads of villages. Those lists, therefore, served as sampling frames for the survey. Below is the citizens' sample stratification diagram.

Figure 2: Citizens' Sample Stratification Diagram



15 Battaglia, M. (2008). Multi-stage sample. In P. Lavrakas (Ed.), Encyclopedia of survey research methods. (pp. 493-494). Thousand Oaks, CA: SAGE Publications, Inc. doi: <http://dx.doi.org/10.4135/9781412963947.n311>

Table 5: distribution of the sample per province and district

Province	Population size	# of districts per province	Rounded # of selected districts	Name of selected District	# of respondents per district (rounded off)
City of Kigali	1,132,686	1.616	2	Gasabo	160
				Kicukiro	160
Southern Province	2,589,975	3.694	4	Kamonyi	160
				Huye	160
				Nyaruguru	160
				Ruhango	160
Northern Province	1,726,370	2.462	2	Rulindo	160
				Musanze	160
Eastern Province	2,595,703	3.703	4	Nyagatare	160
				Kirehe	160
				Bugesera	160
				Kayonza	160
Western Province	2,471,239	3.525	3	Ngororero	160
				Rubavu	160
				Karongi	160
Total (Rwanda)	10,515,973	15.0	15		2400

The number of districts to consider for each province and the City of Kigali is determined on the basis of the proportion of its population in the overall population of Rwanda. Given that in reality, the number of districts cannot be expressed in decimals, the number of districts selected from each province was rounded up or down (depending on the value of the first decimal: < or > 5) as shown in the same table. Given that the total number of districts to consider is 15, Western Province, though it has 3.525 districts, remained with 3 districts instead of 4. For logistical reasons, the number of respondents (citizens' category) was equally distributed in all selected districts (2400 respondents/15 districts = 160 respondents each).

As regards the selection of CSOs, journalists and business community members, for practical reasons (mainly logistical and availability of potential respondents) and bearing in mind the high concentration of these categories in urban areas¹⁶, the majority of them were selected from those areas and according to their lists provided by RGB (CSOs), The Media Self-Regulatory Body and Rwanda Journalists Association (ARJ), Rwanda Revenue Authority (RRA) (for business community members) and development partners (ministry of finance). These lists served as sampling frames.

16 See Rwanda Media Barometer 2013, RGB

II.5 Data collection

The exercise of data collection for RMB2016 Edition was conducted in two phases. On top of the desk research, the first phase consisted of collecting quantitative data from the citizens, Media practitioners, CSOs and the business community. After gathering those data, they were processed (data entry, cleaning and analysed: tabulation and cross-tabulation). This allowed researchers to read through the tables/graphs and identify areas that require in-depth analysis through qualitative methods and to identify people or institutions to provide the needed information. Interview guides were therefore developed and approved by the Client (RGB). Then the second phase of data collection followed, first with FGDs and KIIs afterwards.

II.6 Recruitment and training of enumerators and team leaders

Enumerators and team leaders were hired on the basis of their experience in similar assignments, their commitment and integrity. These, together with data collectors and later data entry clerks were trained on the barometer objectives and methodology, the data collection tools and their administration as well as relevant ethical considerations.

a) Pre-test of the tools (pilot survey)

In order to ensure that the questions were clearly understood, coherent and not duplicated, and to have enumerators get more familiar with the questionnaire, a pre-test of the questionnaire was conducted as part of the training before the commencement of the actual survey. This pilot survey was conducted in sectors other than those in which the actual survey was carried out. All comments and inputs provided by enumerators from the pilot survey were incorporated into the final version of questionnaires used in the survey.

It is, in the final analysis, the same questionnaires that were taken to the NISR together with the whole research protocol approved by the RGB in applying for the research visa. It was after the visa was granted that field commenced.

b) The fieldwork and supervision

The survey was carried out by 18 enumerators divided into six teams of 3 members each. Every team was headed by a team leader who was responsible for supervising the team's day-to-day and reporting to the overall national research coordinator. Prior to this, a zoning activity was carried out that divided the Rwandan territory into 6 zones; using the existing provinces.

Each team was assigned one zone with the two teams assigned to zones where only two districts were sampled due to lower population also assigned to

sample “special categories¹⁷” of the population—which include journalists, business people and CSOs. Each zone had a supervisor to coordinate and supervise the work of the teams operating in that zone. The core role of team leaders and supervisors was to ensure that respondents are selected properly, questionnaires are well administered and responses well recorded, and questionnaires safely returned to the overall team leader at the main research office for processing.

Unlike the questionnaire, FGDs and interviews were conducted by the team leader and experienced researchers who participated in the design of the research protocol, tools and analysis of data.

II.7 Data processing, analysis, interpretation and presentation

Before collecting data, a specific data entry template was designed by the IT-statistician specialist, using the Statistical Package for Social Sciences (SPSS) and on the basis of the aforementioned dimensions, indicators, sub-indicators and the associated questionnaires. After the data collection, quantitative data was captured and entered into the template by data entry clerks under the supervision of the statistician and IT specialist. After the data entry and data cleaning by the specialist, tables, graphs and figures were generated on the basis of the tabulation and data analysis plan.

As with the RMB2013, the RMB2016 Edition used the scaling of questions method to measure peoples’ perception of the state of media development in Rwanda and analysis of quantitative data on those questions used the scoring method. The scoring logic used in the RMB2013¹⁸ was, therefore, instrumental in the RMB2016 Edition.

a. Formula for calculating questions’ score:

A Weighted Average Mean was used to calculate the question scores which is an average in which each quantity to be averaged is assigned a weight. These weightings determine the relative importance of each quantity on the average as indicated in the formula below:

$$\bar{x} = \frac{\sum_{i=1}^n x_i w_i}{\sum_{i=1}^n w_i}$$

Where $x_1, x_2 \dots x_n$ are quantitative scores (1, 2, 3, 4) and

17 Special in the sense that this being a study about understanding media development, journalists, business people and individuals in CSOs are uniquely positioned to assess and poses certain information about media developments that ordinary citizens do not due to their day-to-day involvement of the sector in other ways than listening to or reading news

18 See methodology section of the Rwanda Media Barometer 2013

w1, w2... wn are frequency scores corresponding to respective qualitative scores.

b. Formula used to calculate indicator’ scores

The first step in the scoring process is to construct a score for each question using the above-mentioned formula. At the second step, question scores are aggregated into a score for each sub-indicator. The sub-indicator score is computed as a simple mean of associated question scores (Q-scores).

The same process is used to calculate the indicator score and the overall score as indicated in the formula below:

$$\text{Sub - Indicator Score } X_i = \frac{\sum Q \text{ Sca}}{n}$$

$$\text{Indicator Score } X_i = \frac{\sum SI \text{ Score } X_i}{n}$$

$$\text{Overall Score } X_i = \frac{\sum I \text{ Sca}}{n}$$

where SQ : sub-question

Q : question

SI : Sub-indicator

I: indicator

n: number of questions, sub-indicators and indicators

Table 6: Scoring scale¹⁹

Response option	Score	Perception value
Inexistent/very low performance	0.0–1.9	0%–20%
Low performance	2.0–2.9	21%–40%
Moderate performance	3.0–3.9	41%–60%
High performance	4.0-4.9	61%–80%
Very high performance	5.0	81%–100%

19 The RMB2013 used 5 levels scale-questions. In order for the RMB findings to fit and feed the Rwanda Governance Scorecard (published annually by Rwanda Governance Board), it was recommended that the scale level of RMB2016 be aligned with that of Rwanda Governance Scorecard (see RMB2013, p.96).

- **Comparison of the results of the RMB 2016 Edition and those of RMB 2013**

One of the merits for the RMB2013 is that it set a baseline (quantitative) for assessing media development in Rwanda in the years after. Analytically then, the research team also compared the two editions of the barometers, to examine whether over a period of the last 2 or three years (time between the two barometers) there has been any change (progress, stagnation or decline in the sector) over time. Given the huge amount of data to handle, the comparison was established at the level of dimensions, and few selected indicators.

- **Quality Control measures**

To ensure the quality of the Rwanda Media Barometer, a set of measures were taken both before data collection and during data analysis. These measures are the following:

- Involvement of key media stakeholders.
- Assessment and approval of the RMB survey tools and methodology by the NISR;
- Recruitment of skilled interviewers and supervisors
- Training of interviewers and supervisors
- Pre-testing of the questionnaires
- Supervision of data collection process
- Overall coordination of the fieldwork
- Use of SPSS software for quantitative data analysis

- **Ethical Considerations**

Researching media issues is an endeavour that may involve very sensitive aspects of any country. These can both be emotional, economic, social or political. A couple of ethical considerations were therefore observed. These include the following:

- a) Guaranteeing the anonymity or confidentiality of participants especially respondents to the survey and not attributing a view to a specific individual;
- b) Providing a verbal informed consent of participants to ensure that, prior to voluntary participation, those participants understand clearly the aims of the research and what the data would be used for.
- c) All required authorizations to conduct RMB2016 Edition, especially acquiring the NISR research visa was sought prior to embarking on the fieldwork.
- d) Effort was made to avoid plagiarism in all its forms in the research report.

PART TWO: DEMOGRAPHIC CHARACTERISTICS AND DATA PRESENTATION

Part two presents and describes the demographic characteristics of the study as well as the data relating to the seven indicators and sub-indicators described in chapter two above. Specifically, chapter three below describes the demographic characteristics of the respondents to this study, the geographical areas the study was carried out; and the distribution of respondents while subsequent chapters outline, analyse and interpret study findings.

Chapter III: Geographic Characteristics of Respondents

III.1 Respondents by province and districts

As discussed and justified in the methodological chapter, the survey was conducted in all the four provinces of the country and Kigali City. In each province, two districts were randomly selected and from each district two sectors; cells and villages were randomly selected. The table below presents the study's respondents from each province and district.

Table 7: Number of respondents by provinces and districts

Province	District	Frequency(N)	Percent (%)
Kigali City	GASABO	167	7.0
	KICUKIRO	147	6.1
		314	13.1
South	HUYE	160	6.7
	KAMONYI	161	6.7
	NYARUGURU	160	6.7
	RUHANGO	160	6.7
		641	26.7
East	BUGESERA	161	6.7
	KAYONZA	158	6.6
	KIREHE	161	6.7
	NYAGATARE	160	6.7
		640	26.7
North	MUSANZE	163	6.8
	RULINDO	161	6.7
		324	13.5%

West	KARONGI	160	6.7
	NGORORERO	160	6.7
	RUBAVU	161	6.7
		481	20.0
TOTAL		2400	100

Source: Primary data

III.2 Respondents' Demographic Characteristics

This section describes the socio-demographic characteristics of respondents in the four categories: journalists, CSOs, citizens and members of the business community in Rwanda. The variables considered include sex/gender, age, education and type of residence—whether rural or urban. These characteristics are presented in the table below:

Table 8: Characteristics of respondents—category, gender, age, residence, level of education

Characteristic	Value	Journalists		CSOs		Citizens		Business Community	
		N	%	N	%	N	%	N	%
Sex	Male	144	73.5	133	72.7	1178	49.1	126	59.7
	Female	52	26.5	50	27.3	1222	50.9	85	40.3
	Total	196	100.0	183	100.0	2400	100.0	211	100.0
Urban	Urban			176	96.2	502	20.9	126	59.7
	Rural			7	3.8	1898	79.1	85	40.3
	Total			183	100.0	2400	100.0	211	100.0
Age Group	18-24			1	0.6	276	11.5	8	3.8
	25-29			14	7.9	321	13.4	29	13.9
	30-34			29	16.3	356	14.8	60	28.8
	35-39			36	20.2	369	15.4	45	21.6
	40-44			23	12.9	309	12.9	43	20.7
	45-49			28	15.7	227	9.5	17	8.2
	50-54			20	11.2	182	7.6	6	2.9
	55-59			7	3.9	121	5.0	0	0.0
	60+			20	11.2	239	10.0	0	0.0
	Total			178	100.0	2400	100.0	208	100.0
	18-25	41	20.9						
	26-35	98	50.0						
	36-45	37	18.9						
	46-55	20	10.2						
	Total	196	100.0						
Education	No school			1	0.6	658	27.4	9	4.4
	Primary	1	0.5	3	1.7	1092	45.5	35	17.1
	Post Primary Training		0.0	0	0.0	101	4.2	15	7.3
	Secondary	11	5.9	48	27.4	380	15.8	93	45.4
	Technical High School	1	0.5						
	College Education/ University Degree	173	93.0	123	70.3	169	7.0	53	25.9
	TOTAL	186	100.0	175	100.0	2400	100.0	205	100.0

Source: primary data

As the table, above illustrates, male journalist respondents are more than females in the media category of the sample population. As shown in the table above, close to three-fourth of journalists' respondents are male. This underrepresentation of female journalists seems to be reflected among the journalists in Rwanda as shown in different studies²⁰. As far as age is concerned, the majority journalist respondents are young; with 7 in 10 of them aged between 18 and 35 years. This might have a historical explanation since many journalists were killed in the genocide, (51 of them) while others participating in the genocide with very few surviving to remain in the profession.

Another explanation concerns the proliferation of academic studies and training programs in journalism and communications in Rwanda which are largely attended by young people and subsequently a number joining the sector afterwards. In the same vein, the birth of the worldwide web and the freedom to start online media outlets as well as the marked increase in the number of broadcast media houses (particularly radio and television stations) which recruit young university graduates could be a related explanation.

All journalist respondents were selected from the City of Kigali where the majority of media houses and journalists are based²¹.

With regard to education, most journalist who participated in this study are well educated as the table above shows with around 9 in 10 of them having a college or university degree. The majority of them (85%) graduated either in media, journalism or communication studies.

As regards respondents from the CSO category, the data shows that like for journalists, close to three fourth are male. Female respondents are therefore also underrepresented. In addition, nearly all respondents in this category (96.2%) are in the urban areas, given that the large majority of CSOs included in the study are based in the City of Kigali and other towns of Rwanda.

Concerning the age, unlike the journalists, the data shows that respondents in CSO category are largely adult (not young). Three-fourth of them are aged 35 and above. These respondents are also largely educated as shown in the table above. Seven in ten of them hold at least a college or a university degree.

Unlike in the latter two categories of respondents, the proportion of female respondents in the citizen's category proves to be more or almost equal to that of male respondents. Female respondents represent 50.9% against 49.1% of males.

20 For example see The State of Media Freedom, Professionalism and Development Report, 2011 by the MHC and the List of Accredited Journalists by the RMC, 2016

21 See lists of registered media houses in Rwanda by the MHC, 2011, RMC 2015, and RURA 2015

This proportion is close to that of women in the general population of Rwanda (51.8%)²². The majority of them (8 in 10) live in rural area against 2 in 10 who live in urban areas. The 2012 Fourth Population and Housing Census places the urban population in Rwanda at 16.5%²³ and therefore the distribution of this study's population is, again, closer to the national population distribution on the same indicator.

Moreover, like for the journalists' category, the majority of citizen respondents are young. The data in the table above indicates that 55.1% cumulatively are aged between 18 and 39, and close to 4 in 10 are aged between 18 and 34. Concerning their level of education, it appears to be the lowest of all categories of the respondents. While close to 3 in 10 (i.e. 27.4%) did not attend school at all, 5 in 10 cumulatively have at least completed primary education and a couple of them (4.2%) have some post-primary training. Cumulatively around 2 in 10 completed secondary education at least, with close to 1 in 10 that is 7% holding a college or university degree.

As far as respondents from the business community are concerned, the data shows that close to 6 in 10 are male. Women represent 4 in 10 only. The data also indicates that the majority of respondents in this category (6 in 10) operate in the urban areas, while the rest are based in the rural areas. The majority of them are young. Nearly a half of them (46.5%) are cumulatively aged between 18 and 34. With regard to education, respondents in this category appear to be relatively educated given that only 28.8% cumulatively did not complete at least secondary education. Close to 5 in 10, that 45.4% have completed secondary school only while 25% hold a college or university degree.

22 National Institute of Statistics of Rwanda (2012) Fourth Population and Housing Census. Main Indicators Report. Final Results, Kigali

23 Ibidem

Chapter IV: A system of regulation conducive to freedom of expression, pluralism and diversity of the media

A “*system of regulation conducive to freedom of expression, pluralism and diversity of the media*” is important in assessing and discerning the level of media development in any country—Rwanda included. First, freedom of expression is considered central not only to the advancement of human communication and understanding of each other but also for the realisation of human potential and happiness. These factors gave rise to media freedom itself so as to guarantee a platform where views and information could be exchanged. It is due to this that a growing consensus has emerged over the last three or so decades about the critical importance of an enabling legal environment for the media to flourish and fulfil its primary social functions of informing, entertaining and educating the public. To do so calls for looking at both the existence of relevant laws and policies as well as how these are actualized in practice; for countries may craft excellent laws and policies but lack the required law enforcement and implementation measures or the political will to do so.

This indicator is also important in the Rwandan context as it helps shed light on an important imperative: the need to strike a balance between freedom of expression and the legitimate need to prevent atrocities such as genocide and crimes against humanity, bearing in mind the tragic history of Rwanda and the role the media played in the 1994 genocide against the Tutsi. What should be said here is that media regulation has evolved around these two imperatives, where, on one hand, it seeks to protect the Rwandan society from media hate propaganda while on the other, ensuring that citizens fully enjoy freedom of expression without undue censorship or interference; for citizens’ awareness and empowerment is of paramount importance.

IV.1 Overview of Rwanda’s legal and policy environment in actuality

Today’s Rwanda builds from a background characterised by genocide and mass atrocities in which media played a negative role. Despite such a challenging background, the value and importance of freedom of expression and media freedom is articulated in the country’s constitution and laws. It is endorsed and promoted in international and regional legal instruments that the Rwandan government has endorsed. For instance, article 19 of the UN Declaration of Human Rights of 1948, the International covenant on Civil and Political Rights and the African Charter on Human and Peoples’ rights, to name but a few. In particular, the country has ratified a number of other international conventions, treaties, laws and decrees. These include:

- The International Covenant of 16 December 1966 on Civil and Political

Rights was ratified by the Decree-Law no 08/75 of 12/02/1975 particularly in its Articles 19 and 20;

- The African Charter on Human and Peoples' Rights of 27 June 1981, as ratified by the Law no 10/1983 of 17/5/1983, especially in Article 9;
- Article 19 of the UN Universal Declaration of Human Rights of 1948
- European Convention on Human Rights; and
- American Convention on Human Rights
- In February 2013, the final acts of the plenipotentiary conference of the International Telecommunication Union adopted at Guadalajara/Mexico on October 22nd, 2010 was also ratified.

Following these commitments, Article 38 of the Constitution of the Republic of Rwanda of 2003 Revised in 2015, provides that: "Freedom of the press and freedom of information are recognised and guaranteed by the State". The constitution further requires the adoption of laws that determine the conditions for exercising this freedom. Consequently, the 2013 media law, particularly Article 16, states: "Freedom of the media and freedom to receive information are authorised and recognised by the State. Such freedom shall be applicable in accordance with legal provisions". The media law also provides the right for individuals and organisations to establish media enterprises and describes necessary requirements. Access to information is also guaranteed in the constitution and was translated into a new law for access to information, representing a breakthrough for the right to access information in Rwanda. The Access to information law enacted in 2013 demonstrates a deliberate purpose to entrench transparency in the conduct of public affairs and public participation in governance. In its scope, the law is applied to the public and the private sector, the setup of proactive disclosure and the strong focus on the public interest. If effectively implemented, the law will break the widespread retention of public information by some public servants. Difficulties of access to information in public offices were identified by journalists themselves as a potential source of self-censorship, or, alternatively, the publication of rumours or one-sided stories.

This conducive legal framework evolved from a controlled approach in the aftermath of the genocide towards a more liberalised media landscape. While the 2002 media law liberalised the sector, the reform of the law in 2009 criminalised a number of press actions such as defamation, violation of privacy and incitement to genocide. Following the media reform that started in 2011, this law was again reformed in 2013 leading to a progressive new media law that was enacted. The law has a number of progressive provisions including:

- The recognition of media self-regulation (Article 4) –leading to the creation of a body to regulate the conduct of journalists and is

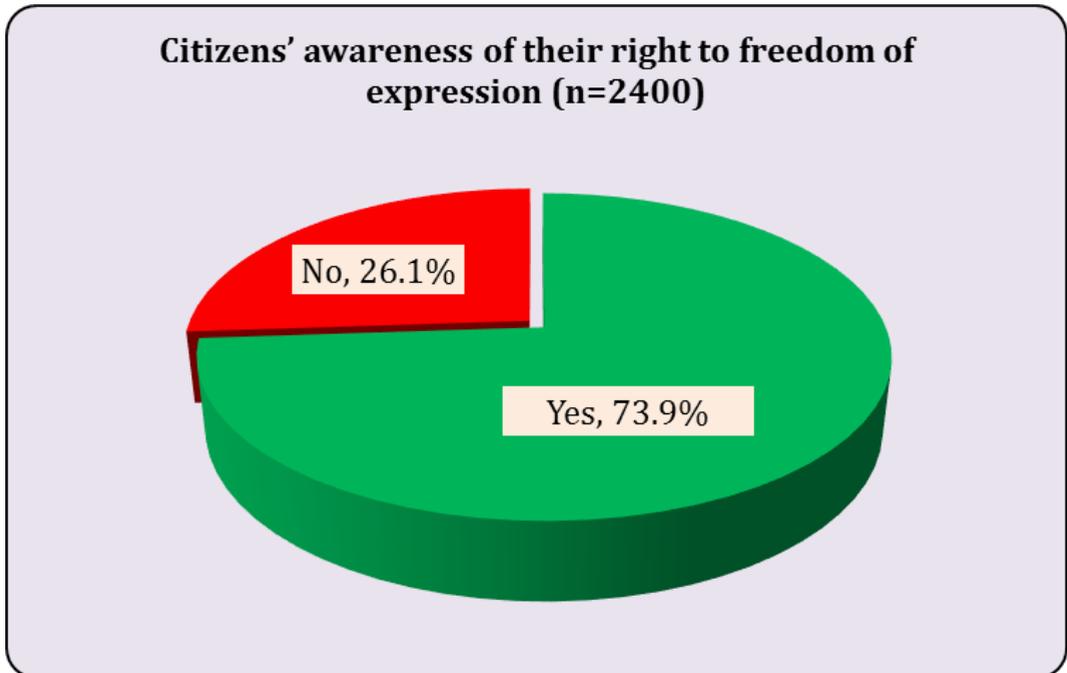
empowered to deal with violation of journalists rights (Article 15);

- Recognition of legal rights for journalists including the right to collect information, and the right to call on any resourceful person to provide information;
- Removing of some restrictions incompatible with the right to freedom of expression that were previously placed on journalists, including prohibitions on “the use of unlawful methods to obtain or to disseminate information”, neglecting essential information” and “distorting ideas contained in an information or a text”;
- Recognition of the rights to reply, rectification and correction, for individuals harmed by the media;
- Media fraternity was allowed to set its own professional standards through the self-regulation mechanism, overseen by peers;
- Lifting of particular academic qualifications for exercising the profession of journalism, opening the media sector to a greater number of people and therefore widening free expression; although some journalists still call for reinstating academic qualification to contain open entry in that sector that is perceived to lead to unprofessional conduct;
- Freelancers hold the same rights as employed journalists;
- Removal of sanctions for the media including suspension, closure of a publication as penalties both of which were seen as restrictions on the right of freedom of expression;
- A new media policy was adopted in 2011. This new policy strengthens media self-regulation and reduces statutory regulation. The policy allows media practitioners to regulate themselves by holding each other accountable through a voluntary process articulated around a code of ethics.
- In the area of broadcast business, a broadcasting policy was approved in 2011. This policy discourages concentration of ownership of print and electronic media, so as to promote a diversity of views and freedom of expression.
- Rwanda Broadcasting Agency (RBA) was created, moving away from state-controlled broadcasting.

VI.2 Citizens' awareness of their right to freedom of expression

Citizens' awareness of their right to freely express themselves is critical because that knowledge forms the basis to both express or exercise that right and demand it where and when it is infringed upon. As the figure below illustrates, study findings show that the level of this awareness is high (73.9%) among ordinary citizens.

Figure 3: Citizen's awareness of their right to freedom of expression



Source: Primary data

Table 9: Respondents' perception on a system of regulation conducive to free expression, media freedom

Categories of respondents		Journalists (%)	CSOs (%)	Citizens (%)	Business Community (%)	Overall (%)
1. A system of regulation conducive to freedom of expression and media freedom		79.3	78.9	81.3	89.2	82.18
1.1. Freedom of expression is guaranteed by law and respected in practice		97.9	94.2	80.5	89.4	90.5
1.2. Media freedom is guaranteed by law and respected in practice		78.7				78.7
1.3. The right to information is guaranteed by law and respected in practice		79.2	90.7	82.1	88.9	85.2
1.4. Editorial independence is guaranteed by law and respected in practice		90.5				90.5
1.5. Journalists' right to protect their sources is guaranteed by law and respected in practice		81.2				81.2
1.6. The public and civil society organisations (CSOs) participate in shaping public policy towards the media		52.1	51.8			52.0

Source: Primary data

VI.3 Media Freedom is guaranteed by law and respected in practice

Laws and policies that define freedom of expression and media freedom as fundamental rights are not only provided for in international instruments ratified by Rwanda but have also been domesticated in Rwandan laws and policies—beginning with the constitution of Rwanda. Moreover, the country has established safeguarding institutions the media self-regulation body to

guarantee that journalists can do their work in an independent and professional manner without any interference.

As the data in the table above shows, 97.9% of journalists agree that freedom of expression is guaranteed by law and respected in practice compared to 94.2% for CSOs; 80.5% among citizens and 89.2% of business people. In addition, as the table above illustrates, media practitioners believe that media freedom has improved from 72% in 2013 to 78.7%; a factor explained by more involvement of journalists in adjudicating their work ethics through the self-regulatory body.

IV.4 The right to information is guaranteed by law and respected in practice

On the awareness of the right to information, 79.2% of journalists; 90.7% of the CSOs; 82.1% of citizens and 88.9% of the business people believe such a right exists in law and respected in practice. The right to information is translated into access to information law that gives the right to all persons to have access to information held by public authorities as per article 3 of **Law No 04/2013 of 20th/08/2013 relating to access to information**. In terms of enforcement, the access to information law requires that all public institutions should put in place a focal point who is bound by law to provide information at the request or proactively whenever it is deemed necessary (Article 8).

IV.5 Journalists right to protect their sources

With regard to the protection of sources, 81.2% of journalists believe such a right exists. Such protection enables journalists to seek and obtain information from different triangulated sources; ensure reliability and accuracy of information and guarantee that journalists cannot endanger their sources. Without such a guarantee, it would, for example, disable investigative journalism which is critical to revealing abuse of power and corruption as sources would be afraid from providing information that might endanger their profession, family, friends or even life.

IV.6 Editorial independence is guaranteed by law and respected in practice

Responses from the present survey show the increase in the perceptions of journalists with regard to their editorial independence. Their perception in this sub-indicator stands at 90.5%. This represents a significant increase from 66.4% in the inaugural media barometer of 2013. This state of affairs can be explained partly by the liberalisation of the media environment and recent reforms that have given more autonomy and editorial independence to

the RBA. The latter, which is a former state broadcaster-Orinfor, underwent a number of internal reforms to become an autonomous body in terms of its management, operations and editorial lines with the idea to become the main public broadcasting agency with an increased focus on citizens in its programming and news.

A related explanation expanding the margins of editorial independence is the increased competitiveness especially in the broadcast sector with more television and radio stations trying to gain more viewership and listenership. Editorial independence has also been realised in the boom of online publications due to the media reforms. On the whole, however, the perceptions are very high among this study's informants that, despite the birth of more media outlets, the quality of programs and news is still low.

IV.7 Public and Civil Society organisations' right to participate in shaping public policy towards the media

As previously mentioned, Rwanda embarked on media reforms in 2011-2013 that have structurally, considerably changed the media landscape. These reform processes have been inclusive and participatory with the media fraternity and some CSOs partaking. The sub-indicator scored 52.0 an indication that more has to be done. Policy formulation, reform and implementation are a complex set of areas where public policy literacy is required to understand the stakes, opportunities and challenges around policy formulation and literacy in this area, strong advocacy and ability to influence are needed before any category of stakeholders can influence policy. To influence policy in terms of sound proposals, one needs to be well equipped with priorities areas; research skills and push forward evidence-based change proposals.

Compared with the 2013 media barometer findings, it is clear that, overall, the system of regulation as perceived by the respondents has largely improved from 71.5 per cent to 81.0 per cent in RMB 2016 Edition. One assumption about the improved perception on this indicator is related to the reforms that have taken place within the last three years, including promulgating the access to information law and the subsequent appointment of access to information focal points in a number of public institutions; a new amended media law in 2013, the internal reforms at the RBA, and, above all, putting in place a self-regulation mechanism managed by journalists themselves. These structural changes are, through a number of interviews conducted perceived to have made the regulation environment more conducive to pluralism and diversity of the media. This environment saw the direct increase in the number of radio stations, televisions and print media outlets especially those powered by the internet as discussed in the introductory chapter.

Chapter V: Plurality and Diversity of Media, Level Economic Playing Field and Transparency of Ownership

Plurality broadly refers to both diversity of content and the number of media content suppliers or media owners. That means the concept is twin-faced with ‘internal’ software and an ‘external’ hardware. The internal element of plurality relates to the extent media content reflects the broad social, cultural political and ideological underpinnings of society while the external component is concerned with the number of media outlets’ owners in the country. This also means that the external meaning of the concept is what is known as “diversity of media” herein covered.²⁴

In general, terms then, ensuring media plurality is considered critical to the advancement of deliberation in society, greater citizen participation and cohesion, cultural diversity and democratic engagement. In that sense, media plurality, diversity, a level economic playing field in the sector and transparency in the ownership of media outlets are all critical for the same reason: facilitating the liberal idea of “a marketplace of ideas” and freedom of choice among media consumers; the citizenry. In practice, this means the existence of an environment where media content producers compete and, in the process, the citizenry get access to a range of content choices relating to news, information, provide and consumed, opinions to consider, and views to reflect on. All these allow the citizens to take informed decisions about their lives; that of their country and in the process, wisely hold their leaders accountable.

V.1 State ensures compliance with measures to promote pluralist media

As the table below illustrates, survey data shows that journalists perceive the state to comply with measures that promote media plurality. The average score on this sub-indicator is 60.9%. The revised media law of 2013 specifically allows the establishment of all types of media, including commercial; community and religious media outlets; aural and aural visual as well as print media.

V.2 State takes positive measures to promote pluralist media

With regard to whether or not the state takes positive measures to promote pluralist media, comparatively, other categories of respondents score less than citizens as the table below illustrate. While, overall 67.2% of citizens agree with the statement, 67.4% of journalists and 51.8% of the CSOs do so. Yet, there has been a marked increase in the number of media outlets, including commercial radio stations, religious, community and public radio stations as well television stations owned variously—by private investors, religious groups, academic institutions and the public. In all, there are 12 operational television stations,

²⁴ See <http://www.mediamonitor.nl/english/the-concept-of-pluralism-media-diversity/>, accessed on April 2, 2016

including Rwanda TV, Royal TV, Flash TV, Contact TV, Goodrich TV, TV10, Family TV; Clouds TV, Isango TV, TV 1, Exalto Tv, Authentic TV; in addition to ten other registered but not yet operational television stations. In addition, there are 35 radio stations, over 80 online news websites and at least 50 registered newspapers—although less than ten are effectively regular.

To the increase in the number of media outlets, it is important to also point out that community media outlets are exempted from paying Value Added Tax (VAT); an element that also indicates that the state promotes pluralist media by empowering citizen focused media to operate with minimal constraint occasioned by taxation. Most informants agree that media plurality is ensured by the state as shown by the number of media outlets that have opened since 2011, but quality and diversity of content remain a challenge.

There is still a wide perception among some media owners and journalists that access to advertising in the public sector is less transparent despite a clear policy stating otherwise. Yet, part of the actual problem for limited access to advertising by some newspapers is also related to the fact that such outlets are less periodical and have very limited reach—largely concentrated in Kigali City besides having a very low readership which all makes advertisers less inclined to advertise with them since the benefit that would accrue is low. The total result of all this is the obvious financial and economic challenges and, in the long term, the unsustainability of such media outlets. And of course, this challenge has been compounded by the increased use of online media outlets as the 2015 Rwanda Print Media Survey illustrates²⁵.

25 Rwanda Print Media Survey, RGB, August 2015, Kigali

Table 10: Respondents perception of plurality and diversity of media, a level playing field and transparency of ownership

Category of Respondents	Journalists (%)	CSOs (%)	Citizens (%)	Business Community (%)	Overall (%)
2. Plurality and diversity of media, a level economic playing field and transparency of ownership	63.7	55.6	67.2		62.2
2.1. State takes positive measures to promote pluralist media	67.4	51.8	67.2		62.1
2.2. State ensures compliance with measures to promote pluralist media	60.9				60.9
2.3. Independent and transparent regulatory system in frequency allocation	65.7				65.7
2.4. State and CSOs actively promote development of community media	69.2	57.8			63.5
2.5. State plan for spectrum allocation ensures optimal use for the public interest	55.2	51.8			53.5
2.6. Independent and transparent regulatory system in media licensing	65.7	60.9			63.3
2.7. State uses taxation and business regulation to encourage media development in a non-discriminatory manner	71.2				71.2
2.8. State does not discriminate through advertising policy	45.7				45.7
2.9. Diversity is reflected in the content of both print and broadcast media	72.4				72.4

Source: Primary data

V.3 Independent and transparent regulatory system in frequency allocation

The number of journalists who perceive the allocation of frequencies and their regulation to be independent and transparent stands at 65.7%. This might be explained, as some informants argued, by the lack of knowledge about how frequencies are allocated. Moreover, most of the broadcast outlets are concentrated in Kigali where there are limited frequencies to be allocated, while in rural areas frequencies are still available.

V.4 State and CSOs actively promote the development of community media

As the table above shows 69.2% of journalists surveyed perceive the “state and CSOs” to “actively promote the development of community media” compared to only 57.8% of CSOs officials surveyed. As earlier noted, there are different types of community radio stations so far established. Some, like Radio Izuba, were started and are operated for the community in the Eastern Province, while others were started by religious organisations like Radio Maria Rwanda that serves the Catholic community and others were founded by NGOs or even the public broadcaster, RBA. And, since media organisations like ARJ and ARFEM fall within the category of CSOs and these clearly promote the birth and operation of community media outlets, it is the perception of informants for this study that both the state and CSOs promote the development of community media. If we factor in the fact that some community radio stations are funded or partly supported by CSOs, such as Institut Panos Grand Lacs (IPGL), and the state exempts them from paying value added tax as earlier stated, it is plausible to agree that both the state and CSOs do support the development of such media outlets.

Nonetheless, the above numerical perceptions are low compared to the reality; a trend that might be explained by the fact that such support and funding is less publicised and therefore little known except within circles that closely follow media development or individuals who actually oversee and manage such support.

V.5 State plan for spectrum allocation ensures optimal use for the public interest

Again, with regard to whether or not the “plan for spectrum allocation” ensuring the “optimal use for the public interest”, the perception is relatively low on this indicator both among journalists and CSOs officials. Only 55.2% of journalists believe that to be the case compared to 51.8% among CSO officials. As is obvious, these perceptions are low although RURA’s Spectrum Allocation Plan Table meets the ITU rules and is said to have been drawn up with consultations from all stakeholders²⁶. In addition, the RURA website clearly documents procedures to award frequencies and these, include, besides meeting broadcasting rules: that the content to be carried be of real impact to the socio-economic well-being of the citizens; that there be innovative elements in the content broadcast and the applicant have the technical means to prevent interference with other broadcast stations.

26 Also see, State of Media Freedom in Rwanda draft report, May 2015, RMC on this indicator

V.6 Independent and transparent regulatory system in media licensing

On the sub-indicator of whether or not the system of regulation in the licensing of the media is transparent and independent, 65.7% of journalists believe such to be the case compared to 60.9% in the CSOs. Again, these perceptions are lower than the reality on the ground considering the fact that the media regulatory regime has substantially improved since 2013 when the responsibility to regulate the media was transferred from the Media High Council to a media self-regulatory body and RURA; the latter two working under a Memorandum of Understanding (MoU) as stipulated by the 2013 law regulating media.

V.7 State uses taxation and business regulation to encourage media development in a non-discriminatory manner

As the table above illustrates, 71.2% of journalists perceive the state to use taxation and business regulation to encourage media development in a non-discriminatory manner. This positive perception partly reflects the fact that community media outlets are exempted from paying VAT, and Rwanda Governance Board with support from UNDP has a grant that facilitates mainly print media outlets to keep afloat²⁷.

V.8 The State does not discriminate through advertising policy

With regard to whether the “state does not discriminate through advertising policy, as the table above shows, 45.7% perceive the state not to discriminate. Such a low perception can be explained by the fact that some media outlets such as The New Times and Imvaho Nshya which are daily, get relatively more advertising from both the public and private sectors than any other media outlets. Furthermore, RBA Radio and TV covers almost a 100% of the country’s territory making it more favourable to advertisers. This is even more so, according to some informants, in the print media sector where most outlets are not reliable; are less periodical; have low reach and a small readership that is largely concentrated in Kigali City.

V.9 Diversity is reflected in the content of both print and broadcast media

On whether “diversity is reflected in the content of both print and broadcast media”, 72.4% of journalists believe so; although, qualitatively, a number of informants believe such diversity only exists in content related to entertainment particularly as it relates to sports shows and showbiz. Overall, almost all informants to this study perceive diversity of content to still be very low.

27 Also see the State of Media Freedom in Rwanda draft report, May 2015, RMC

Chapter VI: Media as a Platform for Democratic Discourse

VI.1 Media as platform for democratic discourse: an overview

In any society, democratic practice requires pluralism, tolerance and openness to others opinion and views. For this playing field to nurture such a democratic culture, media plays a vital role. It allows free circulation of ideas, offers a forum where different ideas are debated, issues discussed and enabling citizens to participate in the conduct of public affairs and the management of collective goods. It offers them the opportunity to hold public authorities accountable. By ensuring accountability, media promotes alternative views, foster deliberation and diversity as well. The following section shed light on perceptions of different segments of the Rwandan population about the role played by media in serving the improvement the democratic discourse.

Table 11: Media as platform for democratic discourse

Category of Respondents		Journalists (%)	CSOs (%)	Citizens (%)	Business Community (%)	Overall (%)
3. Media as a platform for democratic discourse		70.2	82.5	71.9	78.3	75.7
3.1. The media – public, private and community-based – serve the needs of all groups in society				54.4		54.4
3.2. Media organisations ensure their social responsibility by complying with the principle of unity and reconciliation of the Rwandan people	78.0	81.3	83.4	86.1		82.2
3.3. Media organisations ensure their social responsibility by complying with the principle gender equality through their content	69.0	82.8	81.6	82.2		78.9
3.4. Media organisations ensure their social responsibility by complying with the principle anti-corruption practices in their work	72.1	83.3	77.1	76.7		77.3
3.5. The goals of public service broadcasting (PSB) are legally defined and guaranteed	100.0					100.0
3.6. The operations of public service broadcasters do not experience discrimination in any field			74.4	68.3		71.4
3.7. Independent and transparent system of governance	59.8					59.8
3.8. PSBs engage with the public and CSOs	52.3		60.2			56.3
3.9. Media organisations are responsive to public perceptions of their work	78.8					78.8
3.10. Journalists, associated media personnel and media organisations can practice their profession in safety	70.6					70.6

Source: Primary data

Sub-indicators 5,6 and 7 are new, not measured in 2013 barometer, which were introduced in this edition to measure the state of transformation of the former state broadcaster (ORINFOR) into a public broadcaster (Rwanda Broadcasting Agency) as part of the wider media reforms.

VI.2 Public, private and community Media serve the needs of all groups in society

As to whether the public, private and community Media serve the needs of all groups in society is perceived to be higher in this barometer, standing at 54.4 percent compared to 39.9 percent in the 2013 media barometer. The improvement can be a result of the increase in media houses including community radios that operate in the proximity of rural people those who rarely have the opportunity to have their voice heard. It can also be linked to the media reforms that transformed the former broadcaster, ORINFOR into a public broadcaster with an editorial line, according to its mandate, embracing citizen focused reporting. There is also a perception that the debate touching on citizens' concerns has picked, with some talk shows and other programs opening up opportunities for discussing substantive issues across a number of radio and television stations.

Table 12: public, private and community media serve the needs of all groups in society

		Very low	Low	Slightly High	High	Very High	Total	Score	No comment	Don't know	Grand total
Citizens' access to media using the language that they read and understand								3.37			
	%							67.4			
Private print media in Rwanda	N	295	283	368	395	263	1604	3.03	162	634	2400
	%	18.4	17.6	22.9	24.6	16.4	100.0	60.6	6.8	26.4	100.0
	%	19.9	16.4	20.7	24.7	18.3	100.0	61.0	7.2	29.8	100.0
Community broadcast media	N	104	161	477	837	540	2119	3.73	28	253	2400
	%	4.9	7.6	22.5	39.5	25.5	100.0	74.6	1.2	10.5	100.0
Public broadcasters	N	112	186	466	850	547	2161	3.71	34	205	2400
	%	5.2	8.6	21.6	39.3	25.3	100.0	74.2	1.4	8.5	100.0
Private broadcasters	N	185	193	519	742	485	2124	3.54	39	237	2400
	%	8.7	9.1	24.4	34.9	22.8	100.0	70.8	1.6	9.9	100.0
Women's Access to media								2.78			
								55.5%			
	%	32.3	22.2	20.4	19.8	5.2	100.0	48.7	2.6	20.8	100.0

Private print media	N	657	399	362	323	85	1826	2.33	60	514	2400
	%	36.0	21.9	19.8	17.7	4.7	100.0	46.6	2.5	21.4	100.0
Public broadcaster media	N	281	373	545	685	199	2083	3.07	48	269	2400
	%	13.5	17.9	26.2	32.9	9.6	100.0	61.4	2.0	11.2	100.0
Private broadcaster media	N	364	373	501	624	207	2069	2.97	49	282	2400
	%	17.6	18.0	24.2	30.2	10.0	100.0	59.4	2.0	11.8	100.0
Community media	N	301	345	519	634	228	2027	3.07	38	335	2400
	%	14.8	17.0	25.6	31.3	11.2	100.0	61.4	1.6	14.0	100.0
Access to media by the blind, deaf and illiterate citizens								2.02			
	%							40.4			
Private print media	N	1137	496	167	100	16	1916	1.62	62	422	2400
	%	59.3	25.9	8.7	5.2	0.8	100.0	32.5	2.6	17.6	100.0
Public broadcaster media	N	749	529	467	236	64	2045	2.19	61	294	2400
	%	36.6	25.9	22.8	11.5	3.1	100.0	43.7	2.5	12.3	100.0
Private broadcaster media	N	650	500	543	300	66	2059	2.34	60	281	2400
	%	31.6	24.3	26.4	14.6	3.2	100.0	46.7	2.5	11.7	100.0
Community media	N	793	410	399	307	91	2000	2.25	53	347	2400
	%	39.7	20.5	20.0	15.4	4.6	100.0	44.9	2.2	14.5	100.0

Source: Primary data

Some disadvantaged groups are still struggling to get access to media attention although key informants have mentioned they have increased efforts to reach out citizens in rural areas. In terms of content, there is a striking balance between business models striving to increase incomes of private media enterprises and efforts to meet the needs of some disadvantaged groups. As an example, media practitioners still have to do more in accommodating the needs of disabled persons (deaf and blind), so that they may be able to listen and follow the news, documentaries and entertainment. Specialisation of journalists is still a challenge to report on very sophisticated issues such as food security, climate change, private enterprise, gender issues, etc.

VI.3 Media organisations promote the principle of unity and reconciliation of the Rwandan people

Unity and reconciliation appeared to be one of the central policies to rebuild the country and foster a sense of togetherness and national identity after the 1994 genocide against the Tutsi. The Rwandan constitution also names unity and reconciliation as one of its fundamental principles and a vehicle for

national stability and development.

The perception level of different respondents on whether or not media fosters unity and reconciliation is high, reflecting a value that is shared by many media practitioners. There is an even growing perception rate from 80.5 percent in 2013 barometer to 82.2 per cent in the present survey as the table below illustrates.

Table 13: Media organisations promote the principle of unity and reconciliation

		Strongly disagree	Disagree	Moderately agree	Agree	Strongly agree	Total	Score	No comment	Don't know	Grand total
The content of public media promotes unity and reconciliation of the Rwandan people	N	7	19	102	1216	942	2286	4.34	23	91	2400
	%	0.3	0.8	4.5	53.2	41.2	100.0	86.8	1.0	3.8	100.0
The content of private media promotes unity and reconciliation of the Rwandan people	N	47	149	265	1030	691	2182	3.99	31	187	2400
	%	2.2	6.8	12.1	47.2	31.7	100.0	79.9	1.3	7.8	100.0

Source: Primary data

The increase in levels of perceptions on Unity and reconciliation is also shaped by different awareness campaigns promoted by different institutions such as the National Unity and Reconciliation (NURC), National Commission for The Fight Against Genocide (CNLG), RGB, National Commission for Human Rights (NCHR); and Ndi Umunyarwanda program, to mention but a few. It is believed that the social corporate responsibility is at the core of media houses policy management, operations and media content.

VI.4 Media organisations promote the principle of gender equality

Gender equality is one of Rwanda's hardcore public policy. It has materialised in a number of laws, policies and practices. The country has the world's highest number of women in parliament at 64%. It has also adopted gender-based violence legislation, a gender policy that ensures mainstreaming equality as a

cross-cutting value in different sectors. Comparatively, gender equality scored 80.5% in the 2013 media barometer and 78.9% in the present barometer as the table below illustrate.

However, although the perception of gender equality is high, the number of female journalists and media practitioners remains low; despite efforts to attract women to the profession²⁸.

Table 14: Media organisations comply with the principle of gender equality through their programs

		Strongly disagree	Disagree	Moderately agree	Agree	Strongly agree	Total	Score	No comment	Don't know	Grand total
The content of public media promotes gender equality	N	13	49	206	1151	880	2299	4.23	25	76	2400
	%	0.6	2.1	9.0	50.1	38.3	100.0	84.7	1.0	3.2	100.0
The content of private media promotes gender equality	N	54	163	324	1009	642	2192	3.92	34	174	2400
	%	2.5	7.4	14.8	46.0	29.3	100.0	78.4	1.4	7.3	100.0

Source: Primary data

VI.5 Media organisations contribute to the fight against corruption

The UN corruption convention signed in 2003 and ratified by Rwanda specifies that media plays a critical role in preventing and repressing corruption in reporting abuse of power; holding those in public office to account to the citizenry, teaching citizens how to combat and prevent corruption.

Media helps in deterring practices that would become widespread if there is no such watchdog. Comparative analysis shows a significant difference between 2013 barometer and the one we present in this study. In 2013, 69.6 percent of people believed that media content helps to report on corruption and journalists are aware of their corporate social responsibility to prevent and investigate corruption practices while in the 2016 edition barometer the perception stands at 77.3% as the table below shows.

²⁸ See List of Registered Journalists, RMC, 2016, as well as The State of Media Freedom, Professionalism and Development, 2011, Media High Council

Table 15: Media organisations contribute to the fight against corruption

		Strongly disagree	Disagree	Moderately agree	Agree	Strongly agree	Total	Score	No comment	Don't know	Grand total
Public media practitioners' behaviours comply with anti-corruption practices	N	35	94	346	1069	564	2108	3.96	38	254	2400
	%	1.7	4.5	16.4	50.7	26.8	100.0	79.3	1.6	10.6	100.0
Private media practitioners' behaviours comply with anti-corruption practices	N	94	180	427	918	419	2038	3.68	37	325	2400
	%	4.6	8.8	21.0	45.0	20.6	100.0	73.6	1.5	13.5	100.0
The content of public media promotes anticorruption practices	N	45	89	281	1159	632	2206	4.02	31	163	2400
	%	2.0	4.0	12.7	52.5	28.6	100.0	80.3	1.3	6.8	100.0
The content of private media promotes anti-corruption practices	N	105	175	352	1019	482	2133	3.75	38	229	2400
	%	4.9	8.2	16.5	47.8	22.6	100.0	75.0	1.6	9.5	100.0
Indicator score								3.85			
								77.3%			

Source: Primary data

Corruption requires specialised skills in forensic auditing, protecting sources, knowledge in public procurement, public financial management. In the absence of those skills, it seems difficult to make a thorough, accurate and reliable reporting on corruption practices.

VI.6 Media practitioners can practice their profession in safety

Under this sub-indicator, there is an improvement from 61.2% in 2013 to 70.6% in the 2016 edition barometer. According to informants, this marked improvement can partly be attributed to the fact that there is an increasingly close working relationship between the self-regulatory body, private and public institutions, and the former's expanding role in receiving and dealing with complaints against media and media professionals. The perception on this sub-indicator is shown in the table below.

Table 16: Journalists, media personnel and organisations can practice their profession in safety

	Frequency			Percent/%		
	Yes	No	Total	Yes (%)	No (%)	Total %
I've safely (without threats, harassment or surveillance, physical attack, unlawful detention) practised my profession over the last 12 months	118	77	195	60.5	39.5	100.0
All my media organisation's colleagues have safely(without threats, harassment or surveillance, physical attack, unlawfully detention) practised their profession over the last 12 months	111	84	195	56.9	43.1	100.0
No one from my media organisation has been killed in her/his profession over the last 12 months	192	3	195	98.5	1.5	100.0
My media organisation has got clear policies for protecting the health and safety of its staff	135	59	194	69.6	30.4	100.0
My media organisation has got clear measures of social protection to all staff, including temporary and freelance employees	131	63	194	67.5	32.5	100.0
Indicator Score				70.6		

Source: Primary data

VI.7 Media organisations are responsive to public perceptions of their work

Following the liberalisation of the media sector, a number of key informants suggest that the main determining factor for media success is the consumer perception that should shape all their policies, operations and management.

They suggest media owners, managers and journalists should be keen to put people’s needs at the core of everything they do as this is the best way to ensure survival in a very highly competitive context and in the globalised media landscape.

Respondents showed a high score of how media take into account their opinions and views, and the sub-indicators score went up from 61.9 in the 2013 media barometer to 78.8% in the present study as shown in the table below.

Table 17: Media organisations are responsive to public perceptions of their work

		Strongly disagree	Disagree	Moderately agree	Agree	Strongly agree	Total	Score	Refused	Don't know	Grand total
My media organisation regularly makes effort to know about its audience, the quality of its programmes and news	N	0	4	30	135	23	192	3.92	0	2	194
	%	0.0	2.1	15.6	70.3	12.0	100.0	78.4	0.0%	1.0	100.0
My media organisation regularly offers channels for audience engagement (call-ins, debates, outreach service, surveys, etc.)	N	0	9	19	141	23	192	3.93	0	2	194
	%	0.0	4.7	9.9	73.4	12.0	100.0	78.5	0.0	1.0	100.0
My media organisation regularly organises internal audit mechanisms to guarantee transparency and accountability	N	1	7	19	136	29	192	3.96	0	2	194
	%	0.5	3.6	9.9	70.8	15.1	100.0	79.3	0.0	1.0	100.0
Overall score								3.94			
								78.8%			

Source: Primary data

Chapter VII: Professional Capacity Building and Supporting Institutions that underpin Freedom of Expression

As noted in the introduction freedom of expression is best advanced where there is a free, independent, pluralistic and responsible media and such is crucial for the development and reproduction of informed citizenry which is also important for nurturing and sustaining a democratic culture—including rule of law, tolerance, freedom, equality and social order²⁹. This is also possible where the media sector is surrounded by an environment with supportive institutions and organisations that provide services that individual media outlets³⁰ are not able to provide on their own or doing so would be unsustainably expensive—like training, provision of education and research services, advocacy, promotion and defence of media freedom.

Overall, it is the perception of citizens and other media stakeholders such as journalists, members of CSOs and the business community that capacity building institutions and their ability to provide needed training is still low as the summarised table below illustrates. In this study, 59.4% of respondents perceive such institutions to provide needed training. The level of perception about the ability of media supportive institutions to provided needed capacity building is also illustrated by other studies—such as the MHC Five-Year Strategic Capacity Building Plan and similar studies³¹. There is progress on this front as the perception in the 2013 media barometer stood at 51.9%; representing an increase of about 8% in the RMB 2016 Edition.

29 Media Assistance in the Swiss Development Co-operation: Media-A Key Player for Realizing Social Accountability, Orientation Guide, SDC, 2007

30 Ibid

31 See, Strategic Capacity Building Plan for Media: A Five Year Strategy Development for the Media High Council, Rwanda, no year indicated (but was conducted in 2013), Capacity Building of the School of Journalism and Communication (SJC), University of Rwanda, Baseline study, Analyses, M&E system, conducted by Transparency International Rwanda on behalf of FOJO Media Institute and SJC, 2016

Table 18: Respondents' perception about capacity building and institutions that underpin freedom of expression

Category of Respondents	Journalists (%)	CSOs (%)	Citizens (%)	Business Community (%)	Overall (%)
4. Professional capacity building and supporting institution that underpins freedom of expression	63.4	52.8	52.2	63.7	59.4
4.1. Media professionals access training appropriate to their needs	39.0				39.0
4.2. Media managers, including business managers, access training appropriate to their needs	60.3				60.3
4.3. Training equips media professionals with skills to report democracy and development	67.5				67.5
4.4. Academic courses equip students with skills and knowledge to contribute to democratic development	81.5				81.5
4.5. Media workers have the right to join independent trade unions and exercise this right	66.6				66.6
4.6. Trade unions and professional associations provide advocacy on behalf of the profession	71.3				71.3

4.7. CSOs monitor the media systematically		47.0			47.0
4.8 CSOs provide direct advocacy on issues of freedom of expression		47.0			47.0
4.9. CSOs help communities access information and get their voices heard	57.5	48.6	39.7		48.6
4.10. Media meet professional standards of quality	59.8	68.7	64.6	63.7	64.2
4.11. Media practitioners work in economically stable conditions	67.4				67.4

VII.1 Media professionals access training appropriate to their needs

As the table above shows, the perception that journalists access the type of training needed to perform their roles is still low. Only 39% of journalists believe so despite the existence of three journalism schools; a centre for training practising journalists known as GLMC and other organisations offering training, including the MHC that is charged with capacity building in the sector. This can partly be explained by the still low capacity of such schools to provide needed training and skills³². It can further be explained by the fact that most of the training offered is more theoretical than practical, and the sector still generally lacks enough hands-on trainers. In addition, the GLMC which mainly trained practicing journalist has not been operational since the academic year 2015-2016 as well as 2016-2017; largely due to the inability of practicing journalists to pay for the tuition.

VII.2 Journalist who have had opportunities to further develop their skills as media practitioners or specialise in a particular area

As the table below illustrate, again, the number of journalists who have had opportunities to further develop their skills and get specialised training is still low; although the number of journalists that have had in-house training is high standing at 72.7% compared to only 27.7% who have had opportunities to get international training. The reason in-house training is high is because there have been several organisations that were involved in this type of training in recent years. These include, for example, Institut Panos Paris (IPP) and Institut Panos Grand Lacs (IPGL) among others.

32 Factors also highlighted in a baseline survey, analysis and M&E system: Capacity Building of the School of Journalism and Communication, University of Rwanda, 2016, conducted by Transparency International Rwanda on behalf of Fojo Media Institute and the School of Journalism and Communication

Table 19: Journalists who have had opportunities to further develop their skills

	<i>Frequency</i>			<i>Percent</i>		
	<i>Yes</i>	<i>No</i>	<i>Total</i>	<i>Yes (%)</i>	<i>No (%)</i>	<i>Total (%)</i>
In-house	141	53	194	72.7	27.3	100.0
Local	63	128	191	33.0	67.0	100.0
International	53	138	191	27.7	72.3	100.0
Regional or international exchanges and programmes	43	149	192	22.4	77.6	100.0
Indicator Score				39.0%		

Source: Primary data

VII.3 Media managers, including business managers' access to training, appropriate to their needs

The perception that other professionals in the sector—such as managers access needed skills and training is moderate. Among journalists, 60.3% believe that media managers and business executives in the industry access appropriate training. Again, as the table below illustrates, 23.7% of media managers reported receiving training in business skills; including marketing compared to 23% who reported receiving training in skills such as financial management. This means that, overall, training in this sector is still very low. This point is also made by a study conducted on behalf of the School of Journalism and Communication of the University of Rwanda as well as FOJO Media Institute of Sweden that found that only 22% of media managers have formal training in business studies and management³³; a point also highlighted in a capacity building study conducted by the MHC in 2014. The reason for limited training in this sector for media managers and even owners might be because media training schools do not offer these courses nor do media organisations regularly provide them. However, there are a number of universities in Rwanda, including the University of Rwanda that provide such courses; although the challenge remains funding these courses.

33 Ibid

Table 20: Media managers who have had any of the following opportunities

	<i>Frequency</i>				<i>Percent</i>			
	<i>Yes</i>	<i>No</i>	<i>Don't know</i>	<i>Total</i>	<i>Yes (%)</i>	<i>No</i>	<i>Don't know (%)</i>	<i>Total %</i>
Appropriate business skills including marketing	46	74	74	194	23.7	38.1	38.1	61.9
Appropriate business skills including financial management	44	76	71	191	23.0	39.8	37.2	62.8
Indicator Score					23.4			

Source: **primary data**

VII.4 Training equips media professionals with skills to report democracy and development

As table 18 above shows, 67.5% of journalists surveyed reported that the training media professionals receive equip them with skills to report democracy and development areas effectively. The role of the media in the promotion of democracy and sustainable development is considered critical; and, if few professionals have the skills and knowledge to report them, that role would be undermined.

VII.5 Academic courses equip students with skills and knowledge to contribute to democratic development

Differently, as table 18 shows, the perception that the academic courses offered in Rwanda equips students with skills and knowledge to contribute to democratic development is very high. It stands at 81.5% among journalists. Partly, this is because, there are at least three schools of journalism in the country that offer degrees and diplomas in journalism and indeed, theoretically, such schools equip students with the understanding of media and its place in a democratic dispensation. The number of students that have graduated from the school of Journalism between 1998 and 2015 now exceeds 500; GLMC has trained 115 who graduated with diploma courses while over 300 practising journalists have participated in its training since the centre opened in 2008. On the other hand, the department of Journalism at the Catholic Institute of Kabgayi has so far graduated more than 200 graduates. However, some of the graduates do not necessarily join the media industry and even when they do,

many leave the sector for better paying sectors—like working for international organisations; NGOs and government agencies.

VII.6 Media workers have the right to join independent trade unions and exercise this right

The right to join trade unions is provided for and as table 18 show, 66.6% of journalists believe media workers have the right to join independent trade unions and exercise that right.

VII.7 Trade unions and professional associations provide advocacy on behalf of the profession

A total of 71.3% of all journalists surveyed affirms that trade unions and professional associations provide advocacy on behalf of the profession. In practice, and throughout the interviewees conducted, in the case of journalists, it is largely the Rwanda self-regulatory body as well as the Association of Rwanda Journalists that were highlighted for that role.

VII.8 CSOs monitor the media systematically

On whether or not CSOs monitor media systematically, the perception stands at 47%. The revised media law gives the self-regulatory body an oversight role to handle ethical media-related complaints and complaints from the public about the working of the media.

VII.9 CSOs provide direct advocacy on issues of freedom of expression

With regard to whether or not the CSOs provide direct advocacy on issues of freedom of expression; 47% of respondents believe so. The main CSOs that provide such advocacy are ARJ and Rwanda Media Self-Regulatory Body; although, of course, there are other journalists associations that advocate for specific journalists issues—like ARFEM (Association of Rwanda Female Journalists) that advocate for gender equality in the sector et cetera.

VII.10 CSOs help communities access information and get their voices heard

On the question of whether or not CSOs “help communities access information and get their voices heard”, 57.5% of journalists believe that CSOs play such a role compared to 48.6% members of CSOs and 39.7% citizens. Since 2011 and after the adoption of the Access to Information Law in 2013, RGB, as well as the MHC, self-regulatory body; the ombudsman’s office and ARJ have been involved in sensitising local leaders on the importance of providing information to citizens and journalists. Besides sensitising local leaders on the value of providing information to journalists and citizens as is required by law, which also provides for the appointment of information officers in public and

private institutions; most institutions in the country now have websites where the journalist and the public can access information.

VII.11 Media meet professional standards of quality

On whether the media meet professional standards of quality the perception stands at 64.2% compared to 62.7% in RMB 2013. It is evident therefore that professional standards are improving and there is a growing interest for the media fraternity to respect professional standards and ethical practices as shown by the increasing number of journalists and media practitioners who subject themselves to the self-regulatory mechanism and respond to its call when needed; besides respecting the institution's verdict in cases. Out of 122 cases adjudicated by the self-regulatory body since its start up to March 2016, the verdict has been respected and the institution reports that no media practitioner has ever been called to appear before it and declined. Up to March 2016, there were 570 journalists registered with the self-regulatory body; both those who work for the public and private media. According to informants for this study, this is a vote of confidence in the organisation and what it does.

VII.12 Media practitioners work in economically stable conditions

The economic conditions under which media practitioners operate is one of the factors that determine whether or not the media effectively play its role. On this measure, 67.4% of journalists believe that media practitioners “work in economically stable conditions”. This level of stability occasioned by economic conditions is also reported in the May 2015 Rwanda Print Media survey; the 2013 Media Barometer; and the 2011 state of media freedom, professionalism and development report released by the MHC. The limited economic conditions under which media practitioners work is a factor emphasised in the interviews conducted for this study and one of the factors reported in the aforementioned print media survey and low capacity or viability for media outlets.

Chapter VIII: Economic Development Level and Infrastructure Capacity Sufficient to Support Independent and Pluralist Media

Media practitioners operate in a dynamic, competitive and demanding environment. Their working environment should offer them a relevant technical infrastructure enabling them to carry out their responsibilities independently. This requires that media practitioners have access to and be familiar with modern technical facilities for news gathering, production and distribution. An infrastructural capacity sufficient to support independent and pluralist media stands therefore among major indicators to consider in assessing the state of media development in any society. This chapter examines, therefore, journalists' perception of the extent to which their working environment offers them the said modern technical facilities.

Access to modern technical facilities for news gathering, production and distribution prove to be high. The data suggests that access to adequate infrastructure stands at 71% as the table below illustrates. Journalists have more access to and use of ICT tools. This area of media development has improved since 2013. The data from the RMB 2013 shows that access to modern technical facilities for news gathering, production and distribution stood at 68.1%. Since 2001, Rwanda adopted and has been implementing an ICT policy³⁴ which made this country an ICT-driven state in the region. Rwanda's leadership believes that "Development of ICT capacity is essential for reaching Vision 2020 goal of transforming Rwanda into a knowledge-based economy"³⁵. The implementation of this policy has undoubtedly shaped the technological environment in which media houses and journalists operate. The government has installed two computer labs fitted with the internet accessible to all journalists both at the premises of the association of Journalists and of the MHC. The migration from analogue to the digital system of broadcasting has enabled the opening up of a number of new Tv stations with improved signal and coverage.

34 Government of Rwanda, An Integrated Socio-Economic And ICT Policy and Strategies for Accelerated Development: A GOR Policy Document for the Realization of the Vision for Rwanda --- To Transform Rwanda into an Information-Rich Knowledge-Based Society and Economy within Twenty Years, 2000. http://www.myict.gov.rw/fileadmin/Documents/Rwanda_ICT_Policy_NICI_2005.pdf

35 Government of Rwanda, Economic Development and Poverty Reduction Strategy II, 2013-2018, p.65

Table 21: Media organisations have access to modern technical facilities for news gathering, production and distribution

		Strongly disagree	Disagree	Moderately agree	Agree	Strongly agree	Total	Score	Refused	Don't know	Grand total
Media practitioners have access to ICTs and effectively use them	N	1	2	29	140	22	194	3.93	0	1	195
	%	0.5	1.0	14.9	72.2	11.3	100.0	78.6	0.0	0.5	100.0
Media houses have access to a wide range of reference , archival material, equipment with appropriate technical facilities	N	7	30	56	96	6	195	3.33	0	0	195
	%	3.6	15.4	28.7	49.2	3.1	100.0	66.6	0.0	0.0	100.0
Adequate printing and distribution facilities are available for print media	N	15	38	67	62	3	185	3.00	0	10	195
	%	8.1	20.5	36.2	33.5	1.6	100.0	60.0	0.0	5.1	100.0
Public, private and community media Use ICTs to generate citizens' engagement with the media	N	1	9	40	134	9	193	3.73	0	2	195
	%	0.5	4.7	20.7	69.4	4.7	100.0	74.6	0.0	1.0	100.0

Media organisations use multi-platform delivery systems	N	1	8	35	141	8	193	3.76	0	1	194
	%	0.5	4.1	18.1	73.1	4.1	100.0	75.2	0.0	0.5	100.0
Overall score								3.55			
								71.0%			

Chapter IX: Level of Commitment among Media Practitioners to Journalist Professional Code of Conduct and Rate of Compliance to Media Legal Provisions

This is a new indicator that was not captured in the 2013 barometer but informed by development thereafter. Besides, their traditional functions of informing, educating and entertaining the public, media are generally portrayed as playing a watchdog role. In a bid to be effective in this regard, media need to have legitimacy and moral authority among other things, which result partly from the extent to which they stick to the code of ethics and professional standards. As UNESCO put it *“the media must be held accountable if they are to play their role as a watchdog of authorities and other powerful stakeholders, and self-regulation is a function that lies at the very centre of this, fostering the media’s responsibility towards the public and enhancing the quality of the media through voluntary mechanisms that media professionals (journalists, editors and publishers) follow”*³⁶. This chapter examines the level of commitment among media practitioners to journalist professional codes of conduct and rate of compliance with media related legal provisions. More specifically, it explores the nature and effectiveness of existing self-regulation mechanisms for both print and broadcast media.

IX.1 Print and broadcast media have effective mechanisms of self-regulation and display a culture of self-regulation

Rwanda media practitioners established a Code of Ethics for media practitioners that all professionals in the sector are supposed to abide by³⁷. Article 1 of this code provides that *“The journalist and any other media professional shall defend the universal human values of peace, tolerance, democracy, human rights, social progress and national cohesion respectful of each citizen in*

36 UNESCO, Professional Journalism Self-Regulation and New Media, Old Dilemmas in South East Europe and Turkey, 2011, p.11

37 ARFEM, REFO, ARJ, Code of Ethics Governing Journalists and other Media Professionals and the Media in Rwanda, June 2011

accordance with the Universal Declaration of Human Rights”³⁸.

Concerning, the effectiveness of these mechanisms in ensuring self-regulation, the overall data shows that it is relatively high as the table below illustrates. It stands at 67.1%, 64.9%, 66.7% and 72.7% as perceived by citizens, CSOs, journalists and business community members respectively.

Table 22: Print and broadcast media have effective mechanisms of self-regulation and display a culture of self-regulation

		Citizens	CSOs	Journalist	Business Community
Print and broadcast media have effective mechanisms of self-regulation	score	3.69	3.72	3.70	4.13
	%	73.7	74.4	73.9	82.7
Journalist associations operate independently from any influence (government and commercial interests, etc.)	score	2.91	3.09	2.90	3.06
	%	58.2	61.8	57.9	61.2
The public has got adequate and effective channels for their complaints about media programs	score	3.23	3.43	3.36	3.44
	%	64.6	68.6%	67.3	68.8
Media organisations are responsive to their audience	score	3.73	3.52	3.51	3.56
	%	74.6	70.4	70.2	71.2
Codes of ethics and conducts are actively disseminated to journalists and regularly debated and reviewed	score	3.29	2.42	3.36	3.32
	%	65.8	48.3	67.1	66.5
Media practitioners or media organisations do not routinely practice self-censorship	score	3.29	3.29	3.19	4.31
	%	65.7	65.8	63.9	86.2
Indicator Score	score	3.35	3.24	3.34	3.64
	%	67.1	64.9	66.7	72.7
Average score		3.39 (67.8)			

Source: Primary data

It is also worth noting that there is an increment of the effectiveness of mechanisms of self-regulation and the display of a culture of self-regulation, from 64.3% in 2013 media barometer to 67.8% in 2016 Edition. Another important aspect of a culture of self-regulation to consider in this assessment is the extent to which broadcasting code setting out requirements for fairness,

³⁸ Ibidem,

balance and impartiality is effective. This is examined in the table below. The focus is particularly put on impartiality in elections reporting and coverage of parliamentary proceedings.

Table 23: Effective broadcast code setting out requirements for fairness, balance and impartiality

		Citizens	CSOs	Journalists	Business
Principles of fairness, balance and impartiality are respected by media during elections	Score	3.86	3.81	3.47	3.83
	%	77.3	76.2	69.4	76.6
Public broadcaster provide fair and balanced coverage of parliamentary proceedings	Score	4.01	3.69	3.48	3.66
	%	80.3	73.7	69.7	73.1
Indicator score	Score	3.94	3.75	3.48	3.74
	%	78.8	75.0	69.5	74.9
Average score		3.72 (74.55)			

Source: Primary data

The data suggests that the overall effectiveness of broadcasting code setting out requirements for fairness, balance and impartiality is high (74.55%). Respect of fairness, balance and impartiality are respected by media during elections is effective almost at the same level as for respect of fairness and balance in covering of parliamentary proceedings. A slight increase is observed in this area compared with the RMB2013 data, from 68.6% (aggregated scores) to 74.55% in 2016 Edition.

IX.2 Existence of mechanisms of self-regulation at media house level

The average proportion of journalists whose media houses have established internal self-regulation mechanisms stands at 71.6%. Almost all journalists (9 in 10) say they work for media houses with effective self-regulation mechanisms such as a code of conduct. It is also worth noting that self-censorship is not a common practice in the Rwandan media. As the data in the table below indicate, 7 in 10 journalists did not practice self-censorship over the last 12 months; a relatively impressive outcome.

Table 24: Existence of mechanisms of self-regulation at media house level

	<i>Frequency</i>			<i>Percent</i>		
	<i>Yes</i>	<i>No</i>	<i>Total</i>	<i>Yes (%)</i>	<i>No (%)</i>	<i>Total (%)</i>
My media outlet has effective mechanisms of self-regulation	178	16	194	91.8	8.2	100.0
The public has got adequate and effective channels for their complaints about my media programs	106	87	193	54.9	45.1	100.0
My media outlet is responsive to its audience	167	25	192	87.0	13.0	100.0
I or my colleague attended a debate, dissemination or a review session of media codes of ethics and conduct over the last 12 months	65	60	125	52.0	48.0	100.0
I've have not routinely practiced self-censorship over the last 12 months	135	51	186	72.6	27.4	100.0
Indicator Score				71.6		

Source: Primary data

While the figure for those who confess to practice internal self-regulation is high, the proportion of media outlets that have put in place adequate and effective channels of complaints and feedback from the public on media programs stands at 54.9%. Media sector in Rwanda is dynamic and keeps recruiting new media practitioners who would need to get an induction in the career and an introduction to the code of ethics governing this area.

Chapter X: Media Availability and Access to Information for Citizens

Media availability refers to the existence of media (products). “Effective media consumption implies availability and access to information for consumers in languages that they can read, hear and understand”³⁹. Availability of media “refers to closeness of information to consumers”, while access to media means “consumers’ capacity to pay for the information and/or to afford paying the receiver (TV set, radio set, etc.) or any other media platform or medium”⁴⁰. Both media availability and accessibility are considered among many other indicators of media development. This chapter examines therefore the extent to which media (print and broadcast) are available and accessible to the public.

X.1 Proportion of citizens who access both print and broadcast media

Overall, media products are available to the majority of citizens; although the broadcast media is more accessed than print. The average proportion of citizen who access media products (whether available in the neighbourhood or reach their respective districts) stands at 66.5%. Radio broadcast programmes (both public and private) appear to be more accessible to citizens compared to other types of media. Public radio and community radio programmes are available to nearly all citizen respondents (that is, 97.9% and 92.0% respectively). The data also suggests that private radios are accessible to 8 in 10 citizens, while TV programmes (public and private) are available to the majority of citizens (75.5% and 64.2% respectively).

Table 25: Proportion of citizens to whom both print and broadcast media are available

	<i>Frequency</i>			<i>Percent</i>		
	<i>Yes</i>	<i>No</i>	<i>Total</i>	<i>Yes (%)</i>	<i>No (%)</i>	<i>Total (%)</i>
Awareness of where citizens can buy private newspapers in their neighbourhood	571	1822	2393	23.9	76.1	100.0
Public TV broadcaster programs reach my district	1806	585	2391	75.5	24.5	100.0
Private TV broadcast programs reach my district	1535	857	2392	64.2	35.8	100.0

39 Rwanda Governance Board (2013) Rwanda Media Barometer, p.82

40 ibidem

Public radio broadcast programs reach my district	2343	50	2393	97.9	2.1	100.0
Private radio broadcast programs reach my district	1922	469	2391	80.4	19.6	100.0
At least one community broadcast media reach my district	2197	192	2389	92.0	8.0	100.0
Indicator Score				66.5	33.5	

Source: Primary data

Overall, media availability to citizens has significantly improved from 55.2%⁴¹ in 2013 to 66.5% in 2016 Edition. However, availability of print media is still very low. Only around 3 in 10 and 2 in 10 citizen respondents are aware of a place, in their neighbourhood from where they can buy newspapers. It seems that the low reading culture of the Rwandan population, the limited purchasing power, and the constant growth of social media and online newspaper as well as broadcast media are behind this limited availability of hard copy newspapers in Rwanda.

X.2 Accessibility to media facilities

The average proportion of citizen respondents whose households (or household member) own selected media facilities (TV set, radio set, cell phone and cell phone with incorporated radio) stands at 65%, which is slightly higher than that of 2013 survey⁴² which stood at 60.6%). However, while radio set and cell phone ownership remains very high, TV ownership appears to be still low (24.6%), though it is slightly higher than that of 2013 survey which stood at 18.8%. As shown in the table below, 8 in 10 households own functional radio set and functional mobile phone, as against only 24.6% households which possess functional television sets.

However, like for the current Media Barometer, TV ownership remains lowest. One can assume that the high cost of television sets and limited availability and access to energy (electricity) stand among major reasons behind this situation. This shows that despite a high proportion of respondents for whom TV programmes reach in their districts, the large majority of respondents still lack adequate infrastructure to access those programmes.

41 Rwanda Governance Board (2013) op,cit. p.82

42 Rwanda Governance Board (2013) op,cit. p.86

Table 26: Proportion of respondents' households with access to selected media facilities/equipment

	Frequency			Percent		
	Yes	No	Total	Yes (%)	No (%)	Total %
My household own a functional TV set	586	1796	2382	24.6	75.4	100.0
My households own a functional radio set	1914	473	2387	80.2	19.8	100.0
At least a member of my household own a functional cell phone	1908	476	2384	80.0	20.0	100.0
At least a member of my household own a functional cell phone with incorporated radio	1786	590	2376	75.2	24.8	100.0
Indicator Score				65.0	35.0	

Source: Primary data

X.3 Citizens' perception of affordability of selected media facilities/equipment

Affordability of relevant media facilities used by citizens to access information is a critical factor of discerning media development. As the table below illustrates, 54.8% say they can afford such facilities. This is slightly higher than that in the 2013 survey⁴³ which was at 50.9%. Radio sets and cell phones appear to be most affordable (68.8% and 66.7%), while TV sets and internet connectivity are less affordable (40.9% and 42.1% respectively). As far as newspapers are concerned, the data shows that they are fairly affordable. Various types of radio sets that are increasingly available on the local market. Interestingly, mobile phones look almost as affordable as radio sets. Over the past years, Rwanda has seen a constant growing phone penetration. A recent report by Rwanda Utilities Regulatory Authority (RURA) announced that in the first quarter of 2015, "Mobile telephone penetration rate rose to 70.8% as compared to 70% recorded at the end of the previous quarter"⁴⁴. This increasing mobile phone penetration has gone hand in hand with the proliferation of various types of mobile phones and an increase in phone suppliers, which in turn, reduced the cost of mobile phones throughout the country.

⁴³ Rwanda Governance Board (2012) op.cit. p.87

⁴⁴ Rwanda Utilities Regulatory Authority, *Statistics and Tariff Information in Telecom Sector as of March 2016*, p.5

Table 27: Citizens’ perception of affordability of selected media facilities/ equipment

		Not affordable at all	Not affordable	Slightly affordable	Affordable	Very affordable	Total	Score	No comment	Don't know	Grand total
Newspaper	N	487	596	331	555	251	2220	2.77	52	128	2400
	%	21.9	26.8	14.9	25.0	11.3	100.0	55.4	2.2	5.3	100.0
TV Set	N	1153	601	153	305	167	2379	2.05	13	8	2400
	%	48.5	25.3	6.4	12.8	7.0	100.0	40.9	0.5	0.3	100.0
Radio Set	N	229	252	518	1010	374	2383	3.44	13	4	2400
	%	9.6	10.6	21.7	42.4	15.7	100.0	68.8	0.5	0.2	100.0
Internet Connection	N	935	409	162	272	142	1920	2.10	122	358	2400
	%	48.7	21.3	8.4	14.2	7.4	100.0	42.1	5.1	14.9	100.0
Cell Phone	N	294	258	537	921	360	2370	3.34	20	10	2400
	%	12.4	10.9	22.7	38.9	15.2	100.0	66.7	0.8	0.4	100.0
Indicator Score								2.74			
								54.8			

Source: Primary data

X.4 Type of Media from which citizens got news/information in the last 12 months

The predominance of radio as the most available and accessible media facility has been examined and proven by the data in the preceding tables. It is also shown in the table above that radio remains the channel most used by close to 9 in 10 citizen respondents, followed by community meetings used by close to 7 in 10 respondents over the past 12 months. Since a couple of decades, Rwandan households have increasingly embraced the practice of listening to radio programmes. Radio sets are either household-owned or programmes are simply followed in neighbours’ households. As regards community meeting, these have been a common practice in Rwanda, particularly since the advent of the decentralisation policy which entailed regular community meetings, generally at village and cell levels. Additionally, the monthly community work “Umuganda” is often associated with community meetings bringing together citizens at local level. All these are avenues from which citizens get information about the country’s life.

Table 28: type of media citizens used to get news/information in the last 12 months: Comparing 2013 with 2016 Edition

Year	2013	2016 Edition	
		Frequency	Percent(n=2400)
Radio	95.5%	2135	89.0%
Community meetings	59.2%	1658	69.1%
Television	26%	801	33.4%
Relatives and Neighbors	33.8%	743	31.0%
Social media	9.4%	409	17.0%
Newspapers	15.3%	330	13.8%

Concerning social media and newspapers, there is a limited availability but also there is a weak reading culture in Rwanda as a major challenge affecting the growth of print media.

However, it is worth noting that the proportion of citizens using media facilities (as channels from which citizens get information about the country's life) increased between 2013 and 2016.

X.5 Social Media used by citizens to get information about the country's life

Social media is increasingly being used by citizens to get information and news. The increase of local online content (newspapers, radio, TV, etc) may explain partly the slight drop of those previously getting information from hard copy newspapers. The table below outlines the social media that are used by citizens to get informed about the country's life. Facebook remains the most popular with 76.3%; followed by WhatsApp, standing at 65.5% among the respondents who used social media over the past 12 months. Institutional websites, Twitter and Youtube appear to be also used by an important proportion of citizens to get information about the country's life. One should note a substantial increase in the use of social media between 2013 and 2016. Whatsapp has seen a remarkable shift from 14% in 2013 to 65.5% in 2016. In the same breath, Facebook increased users from 62.6% to 76.3%, Twitter from 14.4% to 35% and Youtube from 5.3% to 26.4%. The table below provides a comparative look at the expansion of social media use in the last three years:

Table 29: Social Media used by citizens to get informed about the country's life

	2015		2013
	Frequency	Percent (n=409)	
Face book	312	76.3%	62.6%
WhatsApp	268	65.5%	14%
Institutional Website	229	56.0%	54.7%
Twitter	143	35.0%	14.4%
Youtube	108	26.4%	5.3%
Flickr	14	3.4%	0.8
LinkedIn	13	3.2%	2.1%
Tumblr	9	2.2%	0.4

Source: Primary data

The data in the table above suggests a consistent increase of media availability and accessibility. Radio programs, both public and private, remain predominantly available and accessible. Radio sets and mobile phones (often with incorporated radio) also dominate the media facilities used by the citizens. Social media including facebook, Whatsapp, Twitter, Youtube as well as institutional websites are increasingly being used by the citizens to get information about the country life among other things. However, much is particularly still to be done with regard to television facilities and newspapers.

Chapter XI: Conclusion and Recommendations

The Rwanda Media Barometer (RMB) is a homegrown instrument that measures media development in the country. The instrument measures progress, challenges, and gaps in the media sector as a whole from the perceptions of media stakeholders. The stakeholders include ordinary citizens, media practitioners and journalists, civil society organisations' members and the business community. Findings in this report are also informed by institutional data and views of media experts and development partners. This barometer is the second to be produced with the first; which provided baseline data, having been published in 2013.

In specific terms, the barometer had the following objectives to meet:

- First, to use appropriate and scientific research tools to comprehensively measure the status of media focusing on national values such as freedom of expression and international best practices;
- Secondly, contribute to a deeper scientific understanding of media development through the perceptions of media consumers as well as other indicators of media development like the nature and contribution of the legal and policy environment, access to information law; et cetera;
- Thirdly, discern media progress in the country in the last 3 years and compare this with the RMB 2013, so as to clarify improvement, gaps and challenges possibly impeding the desired rate of development;
- Fourth, gather information on media development and access to information from all media sectors, including, but not limited to television, radio, print, internet, media platform and other forms of media;
- Identify skills available that move the sector forward as well as skills' gaps;
- Establish the probable impact of media reforms with particular focus on the access to information law; media self-regulation and the transformation of the state-owned ORINFOR into a public broadcaster (RBA);
- Make recommendations aimed to move media development in the country forward.

As presented in chapters four to ten as well as in the executive summary, in general, there has been progress in the media sector since the first barometer was published in 2013. The overall growth improved from 60.7% in 2013 to

69.6% in 2016 Edition. Improvement is also noted in all the other indicators with substantial progress observed in the areas of legal infrastructure as well as the number of media outlets started and increased use of social media by citizens to access news and information; with the latter growing from 9.4% in 2013 to 17% in 2016 Edition. Positive findings also include the fact that there is a general appreciation of the media reform that was initiated at the beginning of 2011 and currently under implementation. These reforms comprise a move away from statutory media regulation to self-regulation; reviewing the media law (and enacting an access to information law) as well as moving away from state to public broadcasting. While all these findings illustrate movement in the right direction for the media sector as a whole, there are some notable challenges and gaps to fill. It is on the basis of these identified challenges and gaps that should inform policy direction, investment and funding in the sector. The key challenges and gaps are outlined below:

- a) Limited understanding of access to information law by citizens. This calls for stepping up sensitization and popularising this law. Many media practitioners expressed the desire for the decriminalisation of defamation.
- b) Low perception that the public and civil society organisations participate in shaping public (media) policy (with perception standing at 52%). This needs to be improved.
- c) Low capacity within media outlets: the low capacities in media outlets include the capacity to produce quality content; managerial gaps and capacity to generate income to make media outlets profitable.
- d) Low availability of media especially print to the general public (with only 23.9% of citizens saying they know where they can buy a newspaper). A related challenge is also that a limited number of households (i.e. 24.6%) own a television set.
- e) Perception by media owners, journalists and managers that the economic playing field is not level. Most of the individuals interviewed in the sector believe that certain media outlets are still favoured and get more advertising than the rest.
- f) Low quality of media content and sustainability of media outlets.
- g) Journalists do not pay subscription fees in their associations which makes them dependent on external support.
- h) Rwanda Broadcasting Agency (RBA) assumes the roles of a public

broadcaster and provides signal hosting platform a role that can create conflict of interest with Private and community broadcasters

- i) Private and community broadcasters find the hosting fees charged on masts quite prohibitive.

Recommendations

As noted above, there are a number of challenges facing the media sector that need to be fixed. The recommendations below are based on the above-identified challenges and gaps:

- a) Policy makers should look into the suggestion by some media practitioners regarding the need to review the penal code to decriminalise defamation.
- b. Concerned institutions should step-up public awareness of the citizen's right and responsibility to participate in public policy issues.
- c. Concerned institutions should continue public awareness on the access to information law. This sensitization should also include educating local leaders of the existence of the access to information law and their responsibility to provide information to journalists as well as citizens.
- d. RGB should encourage CSOs to publicise their role in shaping public policy.
- e. MHC to strengthen and better coordinate media capacity building programs including those offered by local and international partners.
- f. There is a need to continue supporting and strengthening the media self-regulatory body to enable it to build internal capacity and handle media-related complaints more effectively and promote ethical conduct of media practitioners.
- g. The government should encourage media mergers in order to increase sustainability and profitability.
- h. The Government should consider the establishment of a "Media Business Development Fund" meant to support media development in general and also encourage media mergers in particular.

In a detailed manner, the table below outlines the major challenges and gaps as well as corresponding recommendations to deal with them.

Table 30: Summary of challenges, gaps and recommendations

N ^o	Indicator	Gap/challenge	Recommendation
1	A. System of regulation conducive to freedom of expression, pluralism and diversity of the media	The perception that the public and civil society organisations participate in shaping public (media) policy is still low standing at 52%. This needs to be improved	Increase public awareness, through public forums and sensitization sessions of the right for the public and CSOs to engage in and participating in public policy issues (RGB, Ministry of Justice, Ombudsman Office)
		Defamation remains a criminal offence in the penal code.	Policy makers should look into the suggestion by some media practitioners regarding the need to review the penal code to decriminalise defamation. (Law Reform Commission, Ministry of Justice, RGB)
2	Plurality and diversity of media, a level economic playing field and transparency of ownership	❖ Perception that the state discriminates in awarding advertising	Encourage Government institutions to put in place transparent guidelines for awarding advertisements to media houses (RPPA, RGB)
3	Media as a platform for democratic discourse	Low perception that both public and private media adequately engage the public and CSOs	Encourage media houses and associations to increase citizen-focused reporting; increase their voices and CSO members as news sources (Media Houses and Associations, RGB, MHC)

4	Professional capacity building and supporting institutions that underpin freedom of expression	Very low perception that media professional access training appropriate to their needs	Encourage media training institutions and organisations to give specialised and technical training in media and media management (MHC)
		Low perception that CSOs monitor the media systematically	The self-regulatory body to effectively promote ethical conduct and media-related complaints handling (Media Self- Regulatory Body with RGB to provide support)
		Journalists do not pay subscription fees in their associations which make them dependent on external support.	Journalists Associations should be encouraged to put in place strategies for generating revenue including membership fees. (ARJ)
5	Economic development levels and infrastructure capacity to support independent and pluralist media	Though media organisations have access to modern technical facilities, using media convergence is still low	Encourage media outlets to embrace media convergence (RGB)

		Rwanda Broadcasting Agency (RBA) assumes the roles of a public broadcaster and provides signal hosting platform a role that creates conflict of interest with Private and community broadcasters	RBA should work with the public utilities regulator to find a solution (RBA, RURA)
		Private and community broadcasters find the hosting fees charged on masts quite prohibitive.	The public utilities regulator should consider special tariffs for the media as a public good.
6	Level of commitment among media practitioners to journalist professional codes of conduct and rate of compliance with media related legal provisions	in-house self-regulation mechanisms need to be improved	Encourage the self-regulatory body to work with media houses to ensure that they have effective internal self-regulatory mechanisms (Media Self-Regulatory Body)
7	Media availability and access to information for citizens	Circulation of newspapers is still very low	Promote reading culture. (RGB, MHC, RALC, MINEDUC, CSOs) Encourage mergers to improve content (RGB)

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