



RWANDA GOVERNANCE BOARD

# Rwanda

## Media Barometer 2018

THE STATE OF MEDIA DEVELOPMENT IN RWANDA



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## LIST OF ACRONYMS

ARJ	Rwanda Journalists Association
CRC	Citizen Report Card
CSO	Civil Society Organization
FGD	Focus Group Discussion
GLMC	Great Lakes Media Centre
GoR	Government of Rwanda
ICT	Information Communication Technology
KII	Key Informant Interview
MHC	Media High Council
MINIJUST	Ministry of Justice
NGO	Non-Government Organization
NISR	National Institute of Statistics of Rwanda
ORINFOR	Office Rwandais de l'Information (National Office for Information)
PBs	Public Broadcasting Services
PSF	Private Sector Federation
RBA	Rwanda Broadcasting Agency
RDB	Rwanda Development Board
RGB	Rwanda Governance Board
RMB	Rwanda Media Barometer
RRA	Rwanda Revenue Authority
RURA	Rwanda Utilities Regulatory Authority
UN	United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organization

## FOREWORD

It is with great honour that I present the Rwanda Media Barometer 2018. The first edition of the Barometer was produced in 2013 at a time when Media Sector Reforms were introduced in Rwanda.

After the reforms, it was deemed important to make a systematic follow up to establish how the reforms were impacting the media landscape with an ultimate aim of building a media sector that is professional, self-regulating, responsible, free and profitable. I am therefore pleased to present the RMB 2018 that shows sustained growth of the media sector since 2013 when the first edition was produced. The RMB 2018 rates media development at 72.4%, up from 69.6% in 2016. This indicates a 2.8% growth.

In the RMB 2018, a new indicator, Level of Public Trust in Media, has been introduced, to establish how citizens appreciate information delivered to them as public are more

likely to pay attention to media they do perceive as credible.

The ripple effects of 2013 media reforms have continued to be felt among media stakeholders; journalists, the citizenry, investors, government institutions and civil society organizations.

Media practitioners and citizens alike continue to enjoy greater freedoms like access to information that has been greatly enhanced by the enactment of the Access to Information Law. Equally, Self-Regulation of the media facilitated timely resolution of press related offenses that would have otherwise ended in courts of Law.

The Rwanda Governance Board and Development partners continued to support the strengthening of Media Houses and Associations to be more professional, accountable and self-reliant.

Despite the registered growth of the sector, profitability remains a big challenge in Rwanda as is in the rest of the world. There is need to build capacity of media managers to run their organizations as profitable enterprises by adapting to the current market dynamics.

The RMB 2018 is testament that our unwavering commitment to building strong pillars for a professional, self-regulating, responsible, free and profitable media sector is bearing fruit. We shall continue working with all stakeholders to consolidate what has been achieved, explore and exploit opportunities that will keep the sector growing and contributing to the life and development of the country.

**Dr Usta Kaitesi**  
**Ag CEO,**  
**Rwanda Governance Board**

## Table 1: Summary of Rwanda Media Barometer

1. A system of regulation conducive to freedom of expression and media freedom	81.1	2. Plurality and diversity of media, a level economic playing field and transparency of ownership	66.3	3. Media as a platform for democratic discourse	74.9	4. Professional capacity building and supporting institutions that underpin freedom of expression	68.4
↓		↓		↓		↓	
5 Sub Indicators		5 Sub Indicators		6 Sub Indicators		5 Sub Indicators	
Freedom of expression	90.8	Measures to promote pluralist media	68.5	The media serves the needs of all groups in society	78.2	Media professionals access training appropriate to their needs	53.3
Media freedom	77.1	Compliance with measures to promote pluralist media	62.5	Promotion of gender equality	77.2	Skills training to report on democracy and development	64.5
Right to information	73.4	Independence and transparency in frequencies allocation	58.3	Promotion of anti-corruption practices	66.9	The right to join media associations	85.7
Editorial independence	85.1	Spectrum allocation	74.8	Promotion of transparent system of governance	74.6	Professional associations advocate on behalf of their members	67.2
Journalists' right to protect their sources	80.0	Equity in advertising policy	45.9	PSB engagement with the public & CSOs	78.8	Professional standards and stable working environment	71.2
				Safety of journalists	73.8		

### Scoring scale

Rank in colour	Value in %	Score
Amber	25–49.9	Low performance
Yellow	50–74.9	High performance
Green	75–100	Very high performance

## 2018 overall scores

5. Economic development levels and infrastructural capacity to support independent and pluralist media	72.4	6. Journalism professional codes of conduct and rate of compliance with media related legal provisions	64.2	7. Media availability and access to information for citizens	75.4	8. Level of Public trust in Media	75.3
↓		↓		↓		↓	
<b>1 Sub Indicator</b>		<b>2 Sub Indicators</b>		<b>4 Sub Indicators</b>		<b>4 Sub Indicators</b>	
Access to modern technical facilities	72.4	Broadcasting code provides for fairness, balance and impartiality	65.7	Availability of media and enabling facilities to citizens	74.9	Citizens' trust in media	73.0
		Compliance with media related legal provisions	62.8	Promotion of culture and Kinyarwanda	74.9	Advocacy on citizens' complaints	78.4
				Educating citizens	79.9	Advocacy for respect of human rights	75.4
				Promoting sports and entertainment	75.8	Promoting wealth and social welfare	74.3

Source: Primary data

## EXECUTIVE SUMMARY

Since its inception in 2013, Rwanda Media Barometer has continued to be a very useful instrument in exploring the status of media development in the country by assessing performance of indicators and sub-indicators that have been developed in line with internationally accepted standards. To achieve the RMB 2018 objectives, a set of eight indicators have been dully studied, scientific methods used to collect, analyse and summarize quantitative data while social science methods have been employed to collect as much and as relevant information as possible.

### The eight Indicators considered are:

1. A system of regulation conducive to freedom of expression, pluralism and diversity of the media;
2. Plurality and diversity of media, a level economic playing field and transparency of ownership;
3. Media as platform for democratic discourse;
4. Professional capacity building and supporting institutions that underpin freedom of expression;
5. Economic development levels and infra-structural capacity to support independent and pluralist media;
6. Level of commitment among media practitioners to journalism professional codes of conduct and rate of compliance with media related legal provisions;
7. Media availability and access to information for citizens;
8. Level of Public trust in Media. (This indicator has been considered for the first time in RMB 2018).

The quantitative approach involved the use of questionnaires, while the qualitative approach combined desk research, individual interviews, and focus group discussions. The total number of respondents has been deliberately increasing over the years, from 2,908 in 2013, to 3,000 in 2016 and 11,716 in 2018, while the geographical dispersal of respondents has as well increased from 15 districts in 2013 and 2016 to covering all the 30 districts in 2018.

With such a trend of affairs, the findings so gathered and presented in the RMB 2018 are more representative as more citizens, CSOs, business community, members of the academia, development partners and the citizenry are all brought in the study with a variety of views and experiences.

With the aggregation of such qualified experiences and quantified information, it can be said that RMB 2018 will be a solid instrument in informing the direction that the Rwanda media industry is bound to take, especially in relation to continued implementation of media reforms, policies and initiatives that are evidence-based in addressing challenges in the sector.

Findings in the RMB 2018 indicate a gradual overall improvement from 69.6% in 2016 to the current 72.4%. The recommendations of this Barometer shall therefore be evaluated and implemented with a target of building a more vibrant, professional and economically viable media sector.

## KEY FINDINGS

The growth curve of media performance in Rwanda has, over the past five years, been consistently registering a gradual but steady upward momentum. When Rwanda Media Barometer was first introduced in 2013, media performance rating was established to be 60.7%, improving to 69.6% in 2016, a growth that has been attributed to a number of reforms that were introduced in 2013 but of which ripple effect has continued to impact the media landscape over the years. RMB 2018 media performance is rated at 72.4%.

## PERFORMANCE OF INDICATORS

Indicator one, “a system of regulation conducive to freedom of expression, pluralism and diversity of the media,” had a slight decline from 82.2% in 2016, to 81.3% in 2018, a score which is, nonetheless, rated under Very High Performance. The slight decline in the perception of the indicator may be attributed to suspension of some media houses due to breach of ethical and professional standards.

The second indicator, “Plurality and Diversity of media, a level economic playing field and transparency of ownership,” was rated at 66.3% in RMB 2018, an improvement from 62.2% in 2016. This is because there has been a favourable environment brought about by media reforms that have enabled more media houses to open up shop.

The third indicator, “Media as a platform for democratic discourse”, scored 74.9% compared to 75.7% in 2016. The decline is due to the perception that some journalists are corrupt and therefore their professional conduct does not promote democratic discourse.

The fourth indicator of “Professional capacity building and supporting institutions that underpin freedom of expression,” stands at 68.4% up from 59.4% in 2016. The growth in the rating is due to improved access by journalists to training appropriate to their work.

The fifth indicator, “Economic development levels and infrastructure capacity to support independent and pluralist media,” earned 72.4%, compared to 71.0% in 2016. There has been general improvement in access to modern technologies, migration from analogue to digital broadcasting and use of ICT for gathering and dissemination of information.

The sixth indicator, “Level of commitment among media practitioners to journalism professional codes of conduct and rate of compliance with media related legal provisions,” registered 64.2%, a decline from 71.4% in 2016. The decline may be explained by the fact that before the establishment of the Rwanda Media Self-Regulatory Body, there was no systematic follow up on cases of unethical and unprofessional conduct. With the Self-Regulatory Body in place, media practitioners and the public have gained more confidence and therefore more cases of misconduct were reported.

The seventh indicator, “Media availability and access to information for citizens”, scored 76.4%, up from 65.8% in 2016. The improvement is largely due to enactment of the access to information law and popularization of citizen-focused reporting, awareness campaigns on access to information among local leaders and increased mobile phones penetration.

Indicator eight “Level of Public trust in Media” has been measured for the first time in the RMB 2018 and has performed at 76.2%. The score of the indicator is attributed to public belief that media plays a big role in advocacy on citizen complaints, advocacy for respect of human rights and promoting wealth and social welfare. The findings indicate a general improvement and continued growth of the media sector in Rwanda.

## Chapter 1: RWANDA MEDIA LANDSCAPE

### 1.1 General Background

Media performance in Rwanda has seen tremendous growth in the past twenty-four years. The present Rwanda media landscape is a function of deliberately concerted efforts by the Government of Rwanda, by, first, enacting a number of media reforms and support from stakeholders that have been put in place to build a vibrant media sector.

This is the third edition of Rwanda Media Barometer (RMB) that measures media development in the country, involving the views of the citizenry, media practitioners, and media owners, members of the business community, media experts, public officials, civil society organizations and development partners.

The promulgation of the 2013 media law resulted in an increase of private and community media. It introduced self regulation in the sector, transformed the state broadcaster into a public broadcaster (Rwanda Broadcasting Agency) with an independent board, among other reforms. The proliferation of media outlets plays an important role in information dissemination and provides a platform for debate and public participation in policy making and governance. The fibre-optic cable laid around the country is gradually increasing public access to “new media” or Social Media and other high-tech

driven sources of information among other advantages.

In the area of training, Rwanda has four journalism and communication training institutions which have been established over the last twenty years. They include the School of Journalism and Communication at the University of Rwanda, the School of Journalism and Communication at the Catholic Institute of Kabgayi, the Faculty of Journalism and Mass Communication of the Christian University of Rwanda, and the Faculty of Mass Communication at Mount Kenya University, Rwanda.

The 2013 media law introduced self-regulation of the media, a shift from the statutory regulation regime that was under the mandate of the Media High Council. The media reforms also introduced Access to Information Law that was intended to ease access to information for both journalists and the public. There is explicit evidence of steadfastness in the development of the media sector in the country, as subsequent chapters in this Barometer shall reveal.

There was revision of some sub-indicators, where some were not considered in the RMB 2018 while a new indicator about Public Trust in Media was introduced.

## 1.2 Objectives

### 1.2.1 General Objective

The general objective of RMB 2018 is to comprehensively measure the status of media development in Rwanda. To realise this objective, previous editions of Rwanda Media Barometer provided benchmarks for conducting a survey about the views of different citizens, media stakeholders, media researchers and media institutions involved in the Rwandan information generation, dissemination and consumption systems. The process was based on secondary/desk research, on empirical institutional research, as well as on surveys and interviews of government, private sector operators and development partners, media practitioners, related industry players, as well as citizens. RMB 2018 will enhance Government effort to further develop the media sector in Rwanda.

### 1.2.2 Specific objectives

1. Use RMB research tools for comprehensive measuring the status of media with regard to national values and international best practices;
2. Review media's progress in the country basing on findings of RMB 2013 and 2016 Editions, and examine challenges possibly impeding the desired rate of development.
3. Gather information concerning media development and access to information from all media sectors including, but not limited to television, radio, print, internet, media platforms and other forms of journalism that exist in Rwanda through questionnaires;
4. Identify skills available that may facilitate and implement effective strategies that encourage dissemination of information and growth of media production;
5. Establish the impact of media reforms with particular focus on the Access to information law and Self-Regulation.
6. Identify projects implemented by media institutions and related problems in the implementation process.
7. Identify the level of public trust in media
8. Make recommendations that will improve media development in the country.

## Chapter 2: RESEARCH METHODOLOGY

RMB 2018 has been built on findings of RMB 2016, which has acted as baseline, to inform on media development status and offer guidance to plans of action to be undertaken in building a progressive, sustainable and vibrant media sector in Rwanda through a coordinated and harmonized process by all concerned stakeholders.

To conduct the RMB 2018, a mixed method approach was applied. Both quantitative and qualitative approaches were used. The quantitative approach involved the use of questionnaires, while the qualitative approach combined desk research, individual interviews, and focus group discussions (FGDs).

It is observed that mixed methods studies promote an understanding of chosen phenomena in a manner that would not be possible using a single approach and identified four main aspects that must be taken into consideration when planning a mixed method research study: time distribution, weight attribution, combination and theorization (SANTOS, J. et al. 2017)

The RMB 2018 used concurrent triangulation whereby both quantitative and qualitative approaches were complementing each other; data were collected concurrently and later compared with the aim of determining convergence, differences and combinations.

The quantitative approach involved the use of questionnaires, while the qualitative approach combined desk research, individual interviews and focus group discussions (FGDs).

The designed questionnaires were administered to media practitioners, business people, civil society organizations while for citizens, Citizen Report Card 2018 data was used. The FGDs conducted with selected groups of journalists and journalism students that were found to express better in groups while personal interviews were organized and conducted with selected managers and chief editors of media outlets, media experts, Media Self-Regulatory Body, Media High Council, government officials, civil society organisations, media researchers and related academics.

### 2.1 Data collection instruments

#### 2.1.1 Desk review

Desk research involved the review of existing laws, policies, reports and other publications pertaining to the regulation of and the state of media in Rwanda.

## 2.1.2 Questionnaire

Questionnaires were administered to media practitioners, business people, media stakeholders, government institutions and civil society organizations. While media practitioners gather, analyse and publish information, other categories were particularly targeted because they are at the same time media information consumers and providers. They are therefore in a good position to assess media development in Rwanda.

As regards qualitative approach the RMB 2018 conducted both individual interviews and FGDs. These were geared towards giving proper environment to participants expected to have wider knowledge on media practice in Rwanda to freely express themselves and give more informative and enriching information.

## 2.1.3 Focus Group Discussions and Individual Interviews

FGDs were conducted with journalists and journalism students. These were selected based on the likelihood for them to better express themselves in groups. Individual interviews were organized with selected managers and chief editors of media outlets, government officials, members of the private sector, development partners and media researchers. Both interviews and FGDs helped get insights and meaning of figures from the questionnaire as well as the data on some qualitative indicators. Appropriate interview and focus group discussion guides were developed to help the facilitation of interviews and discussions.

## 2.2 Study population and sampling

### 2.2.1 Study population

The study population for the RMB 2018 is multidimensional; it involved ordinary people who are the core consumers of the media products and are therefore in a position to evaluate the state of media development in Rwanda. Researchers and academics (media experts) in the area of media and mass-communications also played a key role in this endeavour.

### 2.2.2 Sample size

#### a) Quantitative part of the study

The Rwanda Media Barometer 2018 is a countrywide exercise. The sample size was computed on the basis of various parameters such as the desired degree of precision, target population size, timing and budget. The sample to draw for the collection of quantitative data relates to four categories of the target population:

These are (i) Citizens (primary data from CRC 2018 was used); (ii) journalists; (iii) Representatives of civil society organisations, and (iv) Business community members.

In the drawing of sample sizes, the use of 95% confidence level and 5% margin of error is a common standard once the sample size has been determined.

The sample size was determined using the formula hereafter:

$$n_o = \frac{(Z_i)^2 p(1-p)}{e^2}$$

Where:

$n_o$  =Initial sample

$Z_i$  = 1.96 for 95% level of confidence

$p$  = estimated proportion

$e$  = the desired margin of error. This means that the estimated values are within the range of  $\pm 5\%$  of actual value.

A finite population correction of the above calculated sample size should be applied. The final sample size  $n$  is calculated by

$$n = \frac{n_o}{1 + \frac{n_o}{N}}$$

$n_o$  =Initial sample

$N$  = the target population size.

In this estimation, the significance level is taken as 95% with a margin of error of 5% with a response distribution of 69.6% the overall level of media development in the country from the RMB 2016. Such a sample size provides a base for meaningful comparison to undertake statistically valid sub stratification that fall within acceptable confidence level. The target sample sizes were; Journalist-232, CSOs-320, business people-325 and ordinary citizens-10,995 (from CRC 2018).

### Sampling allocation

For other groups in the quantitative part, the sampling techniques chose respondents basing on certain characteristics of each group. More details are shown in the table below:

**Table 2:** Sampling frame for other groups (besides Citizens whose data was from CRC 2018 data)

Population	Population Size	Margin of error	Confidence level	Distribution level	Population Proportion	Sample size
<b>Total Journalists</b>	<b>802</b>	<b>5%</b>	<b>95%</b>	<b>69.6</b>		<b>232</b>
Category						
<i>Newspapers</i>	184				0.23	53
<i>Online</i>	155				0.19	45
<i>Radio stations</i>	299				0.37	86
<i>TVs</i>	39				0.05	11
<i>Freelancers</i>	125				0.16	36
<b>Business people</b>	<b>152,791</b>	<b>5%</b>	<b>95%</b>	<b>69.6</b>	<b>tax revenue</b>	<b>325</b>
<i>Big</i>	442				0.62	204
<i>Medium</i>	1,744				0.10	35
<i>Small</i>	150,605				0.26	86
<b>CSOs</b>	<b>1274</b>	<b>5%</b>	<b>95%</b>	<b>69.6</b>		<b>230</b>
<b>Total</b>	<b>787</b>					

As shown in the table above, each group has its own population and same parameters to determine sample size. The sample for journalists was 232 and a two stage stratification sampling was applied where the first stage consisted of selecting a media house proportionally to the journalists within media house, whether public, private or community (Print, Online, Radio, TV), and the second stage consisted of selecting journalists within the media house by systematic sampling.

For business people, the selection of the sample was 325, where the allocation was distributed in three strata; big, medium and small using percentage of tax revenue basing on the figures from Rwanda Revenue Authority (tax statistics in Rwanda, 2015-2016). Because of the similarity in their

economic activity within those categories, the allocation within those strata was based on their respective economic activity and geographic location and a random selection of unit of selection (company) within each category.

With regard to CSOs, the selection was based on simple random sampling from its respective population and parameters. Using this sampling, 230 respondents were selected as indicated in the table above. One representative of each CSO was selected basing on total population of CSOs as stated in RGB reports for national CSOs and international NGOs, while the allocation took into account different areas of intervention and geographic location in the country proportionally.

### a) Qualitative part of the study

As far as interviews and FGDs are concerned, for the qualitative part of the study, purposive sampling was used. This means that only people more likely to have the required information/data were selected. In this regard, RMB 2018 did not focus on numbers but deeper understanding and richer discussions of the topics/categories. It was ensured that all categories believed to have the required information are represented in the interviews and/or discussions. The study involved a total of 122 participants in the qualitative part of the study, i.e., 82 key informants and 40 participants in focus group discussions.

The participants were drawn as follows: 9 media managers, 10 editors, 22 representatives of public institutions, 1 representative of Rwanda Civil Society Platform; 1 representative of Private Sector Federation, representative of Media Self-Regulatory Body, 4 researchers representing higher learning institutions from schools of journalism, 3 representatives of professional bodies and 1 representative for One UN Rwanda.

## 2.3 Data collection

Once all data collection/generation tools were approved, the fieldwork commenced. This exercise was carried out by skilled data collectors/generators and team leaders who were recruited and trained for this end. The training covered issues such as survey methods, questionnaire structure and content, data collectors/generators and supervisors' responsibilities, as well as on survey ethics. While quantitative data was collected using questionnaires administered to respondent qualitative data was audio recorded.

### 2.3.1 Fieldwork supervision

In a bid to ensure data quality, the data collection activity was supervised by skilled supervisors and team leaders. Supervisors included researchers while team leaders were recruited based on their experience in carrying out such exercise.

### 2.3.2 Data analysis and interpretation

A quantitative data entry was conducted using CSPro. This paved way to the production of the draft report presented to a wide range of media development stakeholders for validation. The scoring methodology used the following scale where a numeric value is assigned to each response option as follows:

### a) Formula used to calculate questions' score:

A weighted average mean was used to calculate the questions score 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:

$$\bar{x} = \frac{\sum_1^n X_i w_i}{\sum_1^n w_i}$$

Where  $x_1, x_2, \dots, x_n$  are quantitative scores (1, 2, 3, 4) and  $w_1, w_2, \dots, w_n$  are frequency scores corresponding to respective qualitative scores.

## b) Formula used to calculate indicator’s score

The first step in the scoring process is to construct a score for each question using the above mentioned formula. As a 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 (Qscores). The same process is used to calculate the indicator score and the overall score as indicated in the following formula:

$$\text{Sub – IndicatorScore}X_i = \frac{\hat{a} \text{QScore}X_i}{n}$$

$$\text{IndicatorScore}X_i = \frac{\hat{a} \text{SIScore}X_i}{n}$$

$$\text{OverallScore}X_i = \frac{\hat{a} \text{IScore}X_i}{n}$$

where SQ : sub-question

Q : question

SI : Sub-indicator

I: indicator

n : number of questions, sub-indicators and indicators

## c) Scoring scale

The RMB 2016 recommended that the scale of the RMB 2018 should be aligned with RGS scale. The above scoring logic therefore used the following scale where a numeric value is assigned to each ranking colour as follows:

**Table 3: Scoring scale**

Rank in colour	Value in %	Score
Amber	25–49.9	Low performance
Yellow	50–74.9	High performance
Green	75–100	Very high performance

Thanks to this scoring scale, the survey came up with a single score (value) for each media development category and an overall score for all categories. Over time, this scoring method will enable to track progress, stagnation or decline in the state of media development for each of the indicators.

Regarding the analysis of qualitative data, thematic method was used to make sense of and interpret data from interviews and FGDs.

## Weighting Methodology

In RMB 2018, the weighting methodology has been updated to consider the predominance for each group involved in this exercise on quantitative side namely; Journalists, Business Community, CSOs and Citizens. Journalists have the highest weight, at 50%, as the main player on the supply side while on the demand side citizens lead other groups with 30% as the principal consumer of the media. On the other hand, both Business Community and CSOs equally share the remaining 20% by 10% for each.

### 1.3 Indicator framework for the RMB 2018

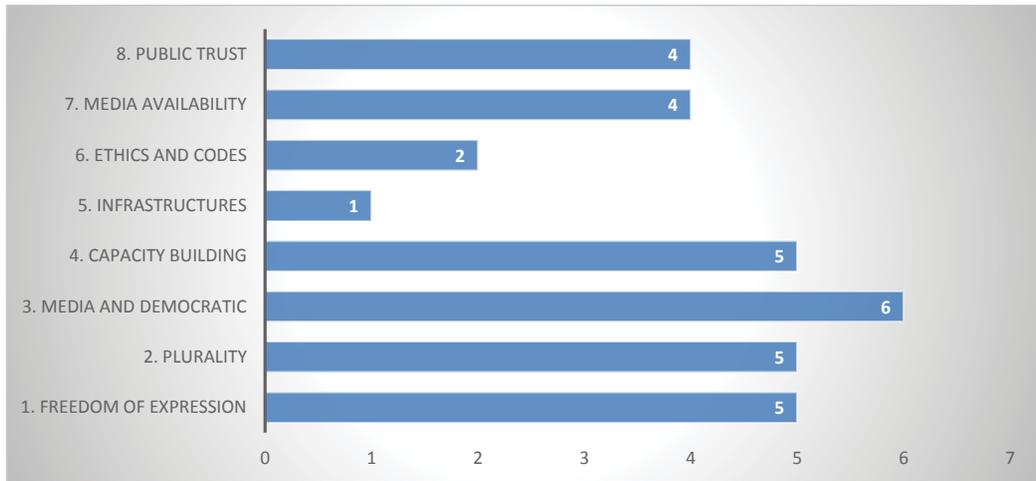
The RMB 2018 is based on indicator framework to guide the measurement of the state of media in Rwanda.

This edition is composed of the following eight indicators;

1. A system of regulation conducive to freedom of expression, pluralism and diversity of the media.
2. Plurality and diversity of media, a level economic playing field and transparency of ownership;
3. Media as platform for democratic discourse;
4. Professional capacity building and supporting institutions that underpin freedom of expression;
5. Economic development levels and infrastructural capacity to support independent and pluralist media;
6. Level of commitment among media practitioners to journalism professional codes of conduct and rate of compliance with media related legal provisions;
7. Media availability and access to information for citizens
8. Level of Public trust in Media. (This indicator has been introduced and considered for the first time in the RMB 2018)

The above eight indicators have, in total, 32 sub-indicators.

Figure 1: Summary of number of RMB 2018 indicators and sub-indicators



## Chapter 3: Demographic information

This section describes the demographic characteristics of the study and how they so relate to the findings. The demographic characteristics that have been considered are; spatial distribution, gender, age and education level, broken down from larger stratified populations of journalists, business community, CSO representatives and ordinary citizens.

### 3.1 Geographical Distribution

For the first time, RMB has involved respondents from all districts in the country for all considered target groups.

**Table 4: RBM 2018 demographic characteristics for respondents: Journalists, Business community, Citizens and CSOs,**

Indicators	Journalists		Business people		CSOs		Citizens	
	N	%	N	%	N	%	N	%
<b>Gender</b>	223	100	313	100	224	100	10955	100
Male	186	83.4	201	64.2	148	66.1	4588	41.9
Female	37	16.6	112	35.8	76	33.9	6367	58.1
<b>Age</b>	223	100	313	100	224	100		
18-25 Years	26	11.7	10	3.2	8	3.6		
26-35 Years	115	51.6	52	16.6	71	31.7		
36-45 Years	59	26.5	126	40.3	89	39.7		
46-55 Years	20	9.0	79	25.2	46	20.5		
55+ Years	3	1.3	46	14.7	10	4.5		
<b>Education level</b>	223	100	313	100	224	100	10955	100
None	0	0.0	2	0.6	0	0.0	3295	30.1
Primary	0	0.0	16	5.1	0	0.0	5609	51.2
Vocational training	2	0.9	66	21.1	16	7.1	664	6.1
Secondary	8	3.6	60	19.2	20	8.9	1119	10.2
Tertiary	213	95.5	169	54.0	188	83.9	268	2.4
<b>Type</b>	223	100						
Print media	70	31.4						
Radio	104	46.6						
TV	28	12.6						
Online	21	9.4						
<b>Origin</b>	223	100						
Rwandan	210	94.2						
International	4	1.8						
Both	9	4.0						

Source: Primary data

### 3.2 Demographic characteristics

A total of 11,715 respondents were involved in the quantitative study of who 43.7% were female and 56.3% were male. The number of male journalist respondents far surpasses the female counterparts at 83.4% and 16.6% respectively.

The citizens' category registered the highest percentage of female respondents at 58.1%.

In relation to age, of the 223 journalists' respondents, 115 of them, representing 51.6% are in the youthful age bracket of 26-35, reflecting a young breed of practitioners that still have the potential of getting their knowledge and skills polished.

## Chapter 4: RESEARCH FINDINGS

### 4.1 Introduction

There has been progress in performance of the media sector over the years. The overall performance of the RMB 2018 is rated at 72.5%, up from 69.6% in 2016, registering a growth of 2.9%. Media availability and access to information for citizens is the most improved indicator, from 65.8% in 2016 to 76.4% in 2018, registering 10.6% growth.

Despite the slight decline from 82.1% in 2016 to 81.3% in 2018, Indicator One on 'a system

of regulation conducive to freedom of expression and media freedom', remains the highest performing indicator.

Indicator Six on 'Level of commitment among media practitioners to journalism professional codes of conduct registered the highest drop in performance in RMB 2018, rating at 64.2% with a -7.2% decline from 71.4% in 2016.

**Table 5: Summary of change in performance by indicator between the 2016 and 2018 RMB**

Nº	Indicators	2016	2018	Change	Trend
		%	%	%	
1.	A system of regulation conducive to freedom of expression and media freedom	82.1	81.3	-0.8	↓
2.	Plurality and diversity of media, a level economic playing field and transparency of ownership	62.2	66.2	4.1	↑
3.	Media as a platform for democratic discourse	75.7	74.9	-0.8	↓
4.	Professional capacity building and supporting institutions that underpin freedom of expression	59.4	68.4	9	↑
5.	Economic development levels and infrastructural capacity to support independent and pluralist media	71	72.4	1.4	↑
6.	Level of commitment among media practitioners to journalism professional codes of conduct and rate of compliance with media related legal provisions	71.4	64.2	-7.2	↓
7.	Media availability and access to information for citizens	65.8	76.4	10.6	↑
8.	Level of Public trust in Media		75.3		
	<b>Overall</b>	<b>69.6</b>	<b>72.4</b>	<b>2.8</b>	<b>↑</b>

Source: Primary data and RMB 2016

The table below shows how each category performed in RMB 2018 vis-à-vis the RMB 2016. Most of the indicators are scored as high performance while only one sub-indicator is in low performance category. One indicator “Media availability and access to information for citizens” migrated from high performance to very high performance category.

Table 6: Change in Indicator performance for Journalists, Business Community, CSOs and Citizens from 2016 – 2018

Indicators	2016					2018				
	Journalists	Business Community	CSOs	Citizens	Overall	Journalists	Business Community	CSOs	Citizens	Overall
	%	%	%	%	%	%	%	%	%	%
1. A system of regulation conducive to freedom of expression and media freedom	79.3	89.2	78.9	81.3	82.1	83.2	65.9	71.0	83.7	81.3
1.1. Freedom of expression	97.9	89.4	94.2	81.3	90.5	98.7	64.4	78.8	90.5	90.8
1.2. Media freedom	78.7				78.7	82.8			67.5	77.1
1.3. Right to Information	79.2	88.9	90.7	82.1	85.2	63.1	70.5	68.8	93.2	73.4
1.4. Editorial independence is guaranteed by law and respected in practice	90.5				90.5	85.1				85.1
1.5. Journalists' right to protect their sources	81.2				81.2	86.3	62.8	65.3		80.0
2. Plurality and diversity of media, a level economic playing field and transparency of ownership	63.7		55.6	67.2	62.2	62.1	64.7	66.2	72.0	66.3
2.1. Measures to promote pluralist media	67.4		51.8	67.2	62.1	67.0	68.3	73.6	69.4	68.5

2.2. Compliance with measures to promote pluralist media	60.9				60.9	64.1	57.1	59.6		62.5
2.3 Independence and transparency in frequencies allocation	65.7				65.7	59.3	56.7	55.0		58.3
2.4 Spectrum allocation	55.2		51.8		53.5	74.2	76.7	76.5	74.6	74.8
2.5 Equity in advertising policy	45.7				45.7	45.9				45.9
<b>3. Media as a platform for democratic discourse</b>	<b>70.2</b>	<b>78.3</b>	<b>82.5</b>	<b>71.9</b>	<b>75.7</b>	<b>74.5</b>	<b>71.4</b>	<b>75.1</b>	<b>74.5</b>	<b>74.9</b>
3.1 The media serves the needs of all groups in society				54.4	54.4	82.6	70.7	76.4	74.0	78.2
3.2 Promotion of gender equality	69.0	82.2	82.8	81.6	78.9	78.3	76.5	78.2	75.3	77.2
3.3 Promotion of anti-corruption practices	72.1	76.7	83.3	77.1	77.3	62.3	64.2	71.0	74.2	66.9
3.4 Promotion of transparent system of governance	59.8				59.8	75.5	74.3	71.0	74.6	74.6
3.5 PSB engagement with the public and CSOs	52.3			60.2	56.3			78.8		78.8
3.6 Safety of Journalists	70.6				70.6	73.8				73.8
<b>4. Professional capacity building and supporting institutions that underpin freedom of expression</b>	<b>63.4</b>	<b>63.7</b>	<b>52.8</b>	<b>52.2</b>	<b>59.4</b>	<b>70.1</b>			<b>67.1</b>	<b>68.4</b>
4.1 Media professionals access training appropriate to their needs	39.0				39.0	53.2				53.3
4.2 Skills training to report on democracy and development	67.5				67.5	64.4				64.5
4.3 The right to join media associations	66.6				66.6	85.6				85.7

4.4 Professional associations advocate on behalf of their members	71.3				71.3	67.1				67.2
4.5 Professional standards and stable working environment	59.8	68.7	64.6	63.7	64.2	75.1			67.1	71.2
<b>5. Economic development levels and infrastructural capacity to support independent and pluralist media</b>	<b>71.0</b>				<b>71.0</b>	<b>76.0</b>	<b>66.5</b>	<b>60.1</b>		<b>72.4</b>
5.1 Access to modern technical facilities	71.0				71.0	76.0	66.5	60.1		72.4
<b>6: Level of commitment among media practitioners to journalism professional codes of conduct and rate of compliance with media related legal provisions</b>	<b>70.4</b>	<b>72.8</b>	<b>71.4</b>	<b>71.1</b>	<b>71.4</b>	<b>66.4</b>	<b>57.8</b>	<b>58.9</b>		<b>64.2</b>
6.1. Broadcasting code provides for fairness, balance and impartiality	69.5	74.9	75.0	67.1	67.8	68.8	57.3	58.9		65.7
6.2 Compliance with media related legal provisions						64.1	58.3			62.8
<b>7. Media availability and access to information for citizens</b>				<b>65.8</b>	<b>65.8</b>	<b>68.0</b>			<b>79.2</b>	<b>76.4</b>
<b>7.1 Availability of media and enabling facilities to citizens</b>				<b>66.5</b>	<b>66.5</b>	<b>68.0</b>			<b>86.3</b>	<b>74.9</b>
7.2 Both print and broadcast media and related facilities are accessible to citizens				65.0	65.0					
7.3 Media promotes culture and Kinyarwanda									74.9	74.9

7.4 Media promotes a knowledgeable society									79.9	79.9
7.5 Media promotes sports and entertainment									75.8	75.8
<b>8. Level of Public trust in Media</b>							<b>65.2</b>	<b>69.1</b>	<b>76.2</b>	<b>75.3</b>
8.1 Citizens' trust in media							65.2	69.1	76.9	73.0
8.2 Advocacy on citizens' complaints									78.4	78.4
8.3 Advocacy for respect of human rights									75.4	75.4
8.4 Promoting wealth and social welfare									74.3	74.3
<b>Overall</b>	<b>69.7</b>	<b>76.0</b>	<b>67.7</b>	<b>59.0</b>	<b>69.6</b>	<b>71.5</b>	<b>65.3</b>	<b>66.7</b>	<b>75.5</b>	<b>72.4</b>

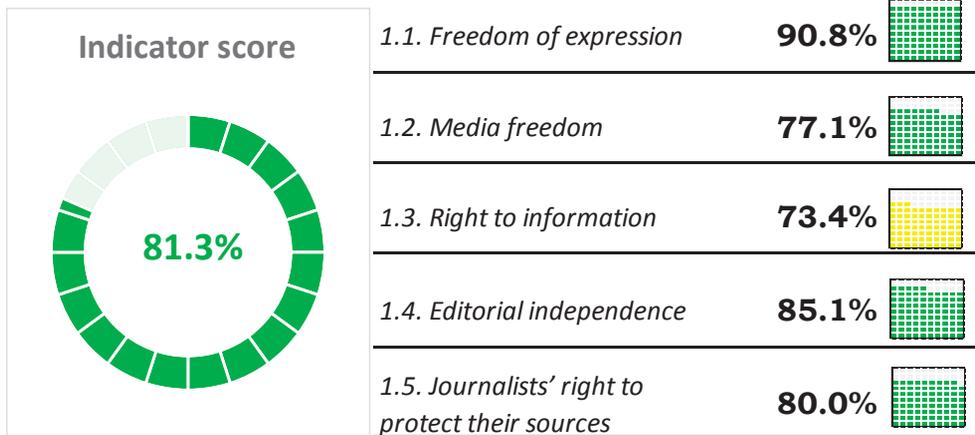
Source: Primary Data, RMB 2016

## Chapter 5: SYSTEM OF REGULATION CONDUCTIVE TO FREEDOM OF EXPRESSION, PLURALISM AND DIVERSITY OF THE MEDIA

This indicator, 'A system of regulation conducive to freedom of expression, pluralism and diversity of the media' measures the level of media development in relation to an enabling legal environment for the media to flourish and fulfill its primary functions of informing, entertaining and educating the public.

Five sub-indicators were measured under this indicator as summarized in Figure 3 below.

Figure 2: Summary of Indicator One and sub-indicator performance



Source: Primary Data

The figure above shows that the sub-indicator on freedom of expression scores highest at 90.8% while the right to information scores the lowest at 73.4%.

### Scoring scale



**Table 7: Perception on a system of regulation conducive to freedom of expression and media freedom**

Sub-indicator	Journalists	Business Community	CSOs	Citizens	Overall
<b>AVERAGE</b>	<b>83.2</b>	<b>65.9</b>	<b>71.0</b>	<b>83.7</b>	<b>81.3</b>
Freedom of expression is guaranteed in law and respected in practice	98.7	64.4	78.8	90.5	90.8
Media freedom	82.8			67.5	77.1
Right to information	63.1	70.5	68.8	93.2	73.4
Editorial independence	85.1				85.1
Journalists' right to protect their sources	86.3	62.8	65.3		80.0

Source: Primary Data

As indicated above, this indicator has continued to perform well at a rate of 81.3%. This, however, represents a decline from 82.1% in 2016. The sub-indicator, 'Freedom of Expression', had the highest score at 90.8% while 'Right to Information', had the lowest score at 73.4%.

### 5.1 Freedom of Expression

The score for this sub-indicator is 90.8%. The scores by category of respondents indicate that 98.7% of journalists agree that freedom of expression is guaranteed by law and respected in practice; a slight improvement from 97.9% in the RMB 2016. This is because there have been deliberate efforts in creating awareness among journalists of the right to freedom of expression, speech and information. The 2013 media law that saw the introduction of self-regulation are also responsible for this high rating by journalists.

Members of the business community, on the other hand, rate the system of regulation conducive to freedom of expression and media freedom at 64.4%, CSOs at 78.8% and citizens at 90.5%.

### 5.2 Media freedom

Findings on the sub-indicator of 'Media freedom' had an overall score of 77.1%. There was remarkable recognition from journalists who rated the improvement of media freedom from a rating of 78.7% in 2016 to 82.8% in the RMB 2018.

Overall, there is improvement in media freedom as guaranteed by law and respected in practice supported by the reforms, laws and policies in place.

### 5.3 Right to Information

The RMB 2018 average rating of ‘Right to Information’ is 73.2%, a decline from 85.2% in 2016. Journalists’ ranking of their right to information registered the lowest performance under this sub-indicator at 63.1%, business community at 70.5%, CSOs 68.8% and 90.5% for citizens.

While citizens show the highest rating, journalists feel there are some individuals and institutions that deny them information.

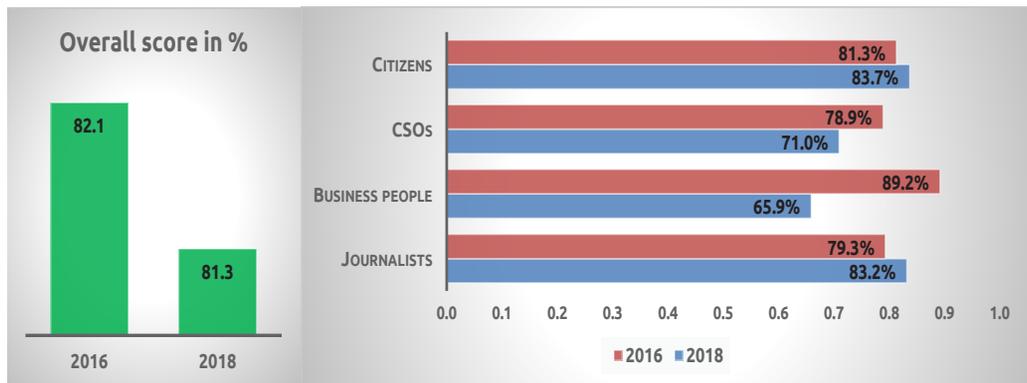
### 5.4 Editorial independence

The score for this sub-indicator is 85.1% in the RMB 2018. Respondents were journalists only.

### 5.5 Journalists’ right to protect their sources

The performance of the sub-indicator on ‘journalists’ right to protect their sources’ is 80%. An average of 86.3% of journalist respondents confirm that their right to protect their sources is guaranteed by law and respected in practice, an upward growth from 81.2% in 2016. Majority of respondents (91.8%) confirm that they were not forced to disclose their sources in the past 12 months.

**Figure 3: Comparison of performance in the system of regulation conducive to freedom of expression, pluralism and diversity of the media, between RMBs 2016 and 2018**



Source: Primary Data and RMB 2016

The figure above shows that there was a slight decline from 82.1% in RMB 2016 to 81.3% in RMB 2018, but the score remains ranked high.

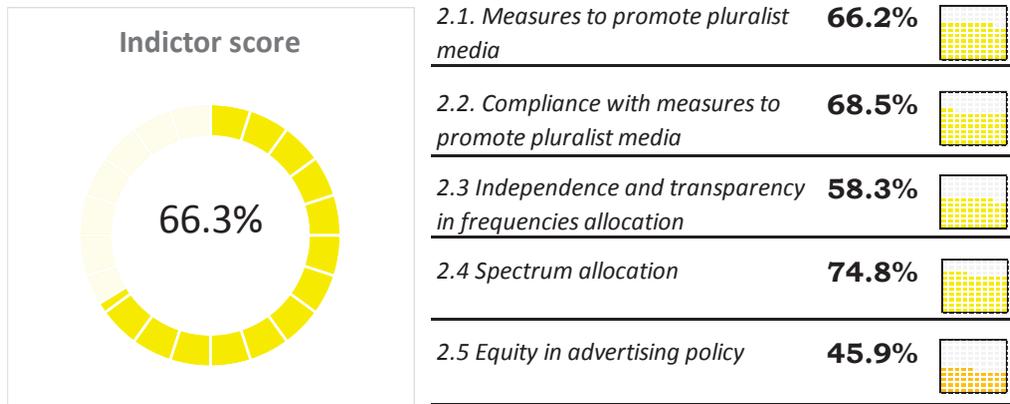
## Chapter 6: PLURALITY AND DIVERSITY OF MEDIA, A LEVEL ECONOMIC PLAYING FIELD AND TRANSPARENCY OF OWNERSHIP

Media pluralism is paramount for a functioning democracy and for a free and open society. Access to a plurality of editorial lines and analyses is essential for citizens to be able to confront ideas, to make their own informed choices and to conduct their life freely (UNESCO, 2008).

Pluralism refers to diversity in the most general sense. Internal pluralism reflects how social and political diversity are reflected in media content. That is, the representation of different cultural groups in the media as well as divergent political or ideological opinions and viewpoints (RMB 2016).

Five sub-indicators were measured under this indicator as summarized in the figure below.

**Figure 4: Summary of Indicator Two and sub-indicator performance**



**Source: Primary Data**

As indicated above, ‘spectrum allocation ensures optimal use for public interest’ was the best performing sub-indicator at 74.8% while the perception of whether ‘Equity in advertising policy,’ had the lowest ranking at 45.9%.

**Table 8: Perception of plurality and diversity of media, a level playing field and transparency of ownership**

Respondents	Journalists	Business Community	CSOs	Citizens	Overall
<b>AVERAGE</b>	<b>62.1</b>	<b>64.7</b>	<b>66.2</b>	<b>72.0</b>	<b>66.3</b>
Measures to promote pluralist media	67.0	68.3	73.6	69.4	68.5
Compliance with measures to promote pluralist media	64.1	57.1	59.6		62.5
Independence and transparency in frequencies allocation	59.3	56.7	55.0		58.3
Spectrum allocation	74.2	76.7	76.5	74.6	74.8
Equity in advertising policy	45.9				45.9

Source: Primary Data

In the above table, it is indicated that there has been improvement in the perception of government initiatives put in place to promote media plurality and diversity in Rwanda, from 62.2% in RMB 2016 to 66.3% in RMB 2018. The growth is attributed to the ease of starting media business and the availability of diverse editorial content.

### 6.1 Measures to promote pluralist media

The average performance of this sub-indicator is 68.5%. On the measures taken to promote pluralist media, journalists register the lowest satisfaction at 67%, followed by business community at 68.3% and CSOs at 73.6% while citizens rate at 69.4%.

### 6.2 Compliance with measures to promote pluralist media

The performance of this sub-indicator improved from 60.9% in 2016 to 62.5% in 2018. The revised media law of 2013 has translated into the establishment of media outlets that have been opened over the years in print, electronic and online platforms.

### 6.3 Independence and transparency in frequencies allocation

The rating of 'independence and transparency in frequencies allocation' is 58.3% down from 65.7% in 2016. Journalists' rating is 59.3%, business community at 56.7% and 55% among CSOs.

### 6.4 Spectrum allocation

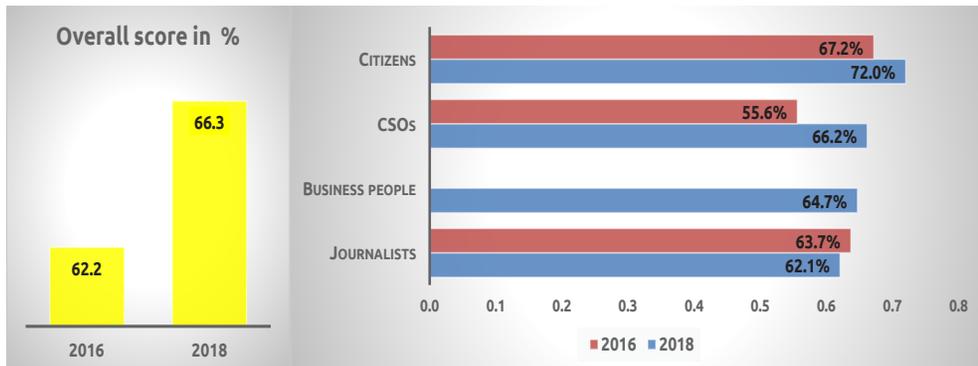
There has been an overall growth in the perception of recognizing the state plan for spectrum allocation and ensuring the optimal use for the public interest from 53.5% in 2016 to 74.8% in 2018. Journalists rate this sub-indicator at 74.2%, CSOs at 76.5%, business community at 76.7% and 74.6% for citizens.

### 6.5 Equity in advertising policy

This is one of the least performing sub-indicator over the years, rated at 45.7% in 2016, and 45.9% in 2018. In the RMB 2016, it is observed that; “Such a low performance can be explained by the fact that 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 cover almost 100% of the country’s territory, making it more favourable to the advertisers. This is even more so, according to some informants, in the print media sector where most outlets are not regular, having low reach and small readership that is largely concentrated in Kigali City.” (RMB, 2016).

Besides, the introduction of e-procurement and e-recruitment in public sector where suppliers seeking tenders in public agencies can only be able to submit their bids through e-Procurement System, substantially affected incomes that media outlets used to earn from advertising.

**Figure 5: Comparison of performance of Plurality and diversity of media, a level playing field and transparency of ownership between the 2016 and 2018 RMBs**



Source: Primary Data and RMB 2016

The figure above shows an improvement in the overall perception of government initiatives put in place to promote media plurality, from 62.2% in RMB 2016 to 66.3% in RMB 2018

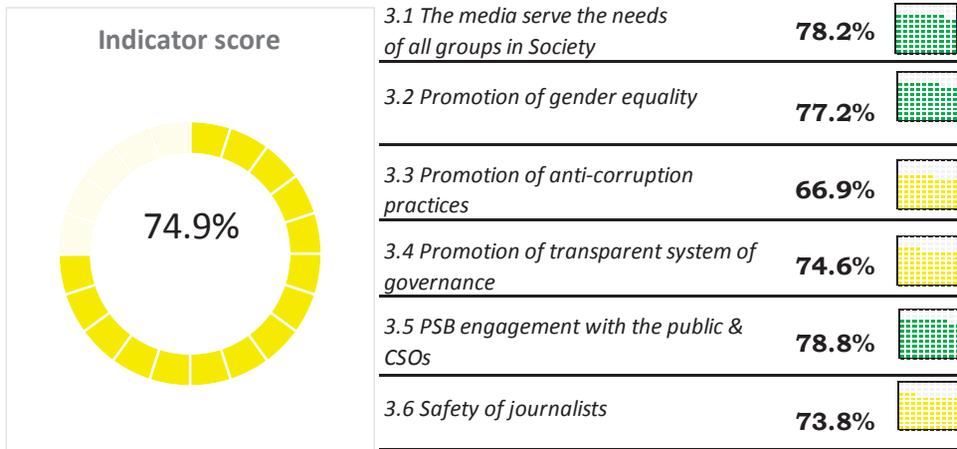
## Chapter 7: MEDIA AS A PLATFORM FOR DEMOCRATIC DISCOURSE

The media reflects the nature and level of maturity of democracy in a country as no other social indicator can. The media epitomize what has often been described as the unfettered freedom of expression of ideas and opinions in a society.

This section explores the perceptions of different segments of the Rwandan population about the role played by media in serving the improvement of the democratic discourse.

The performance of the indicator is 74.9%, almost in the same region with RMB 2016 rating at 75.7%. Six sub-indicators were measured under this indicator as summarized in the figure below.

**Figure 6: Summary of Indicator Three and sub-indicators performance**



Source: Primary Data

As indicated in the figure above, the sub-indicator on ‘Public Service Broadcaster (PSB) engagement with the public and CSOs’ has the highest score at 78.8% while upholding the principle of anti-corruption scores lowest at 66.9%.

Table 9: Perception of media as a platform for democratic discourse

Respondents	Journalists	Business Community	CSOs	Citizens	Overall
<b>AVERAGE</b>	<b>74.5</b>	<b>71.4</b>	<b>75.1</b>	<b>74.5</b>	<b>74.9</b>
The media serves the needs of all groups in society	82.6	70.7	76.4	74.0	<b>78.2</b>
Media organisations ensure their social responsibility by promoting principles of gender equality	78.3	76.5	78.2	75.3	<b>77.2</b>
Media organisations ensure their social responsibility by complying with the principle of anti-corruption practices in their work	62.3	64.2	71.0	74.2	<b>66.9</b>
Promotion of transparent system of governance	75.5	74.3	71.0	74.6	<b>74.6</b>
PBS engage with the public and CSOs			78.8		<b>78.8</b>
Safety of journalists	73.8				<b>73.8</b>

Source: Primary data

The above table shows that the score for the indicator on media as a platform for democratic discourse, is 74.9% with the sub-indicator on ‘PBS engage with the public and CSOs’ ranked highest at 78.8% while ‘media organisations ensure their social responsibility by complying with the principle of anti-corruption practices in their work,’ ranks lowest at 66.9%.

Scores by categories are; 74.5% for journalists, 71.4% for journalists, 75.1% for CSOs and 74.5% for citizens.

## 7.1 The media serves the needs of all groups in society

There has been steady growth in the perception that the public, private and community media do serve the needs of all groups in society; from 54.4% in 2016 to 78.2.0%. Journalists have the highest perception in this sub-indicator at 82.6%, business community, 70.7%, CSOs 76.4% and Citizens 74.0%.

This, on the whole, can be attributed to growth in the number of media houses that provide platforms for discussing local and national issues.

The increase in the number of media outlets has provided space for a variety of ideas, attracting different categories of discussants, listenership and sponsorships; and, in the process, serving needs of all groups in society. There has been a shift especially with FM radio stations where almost all radio programmes have call-in slots that have been embraced with enthusiasm. This has created space for public participation that caters for all groups in society.

People are expressing their views on different topical issues which has strengthened accountability.

## 7.2 Promotion of gender equality

The score for this sub-indicator is 77.2% a decline from 78.9% in RMB 2016. The rating by categories of respondents is; 78.3% for journalists, CSOs at 78.2%, business community at 76.5% and citizens at 75.3%. Despite the slight decline, the sub-indicator is rated in “very high performance” category. Although the perception of fostering gender equality through content is high, the number of female journalists remains low.

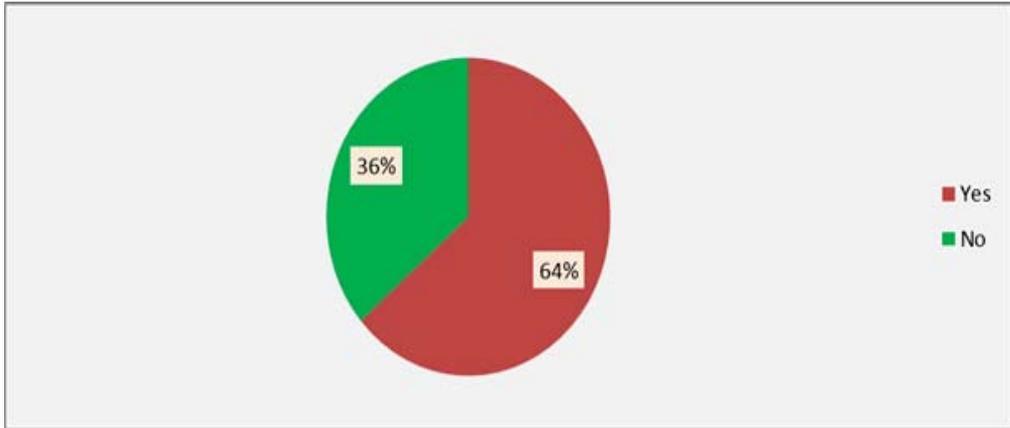
## 7.3 Promotion of anti-corruption practices

Media organizations’ compliance with the principle of anti-corruption practices scored 66.9%, in RMB 2018 declining from 77.3% in 2016.

There has been variation in the way members of the public perceive media role in fighting corruption. Journalists’ perception of this sub-indicator is the lowest at 54.4%, 64.2% for business community, 71% for CSOs and 74.2% among citizens.

The decline in rating is attributed to corrupt tendencies reported among journalists, compromising their ethical and professional conduct, negatively impacting the way they report on corruption.

Figure 7: Perception on corruption observed in media



Source: Primary Data

In the RMB 2018 the perception of corruption is observed in media almost two third of the respondents estimated at 64% of journalists confirm that there is corruption in media.

Table 10: Perception on types of corruption observed in the media (out of 142)

Form of corruption	YES (%)	NO (%)
1. Money	93.7%	6.3%
2. Favoritism	55.3%	44.7%
3. Sex	56.5%	43.5%
4. Other	15.4%	84.6 %
Out of 142 journalist		

Source: Primary Data

As illustrated in the figure above most of the respondents confirm there is corruption with cash bribes perceived to be the most form of corruption observed in media rated at 93.7%.

### 7.4 Promotion of transparent system of governance

The overall score on whether media promotes transparent system of governance is 74.6%, up from 59.8% in 2016. The RMB 2018 scores by categories were; 75.5% for journalists, 74.3% for business community, 71.0% for CSOs and 74.6% for the citizens. Media discussions and reporting, including advocacy for citizens are increasingly eliciting accountability from public and private officials, promoting transparency and good governance in the process.

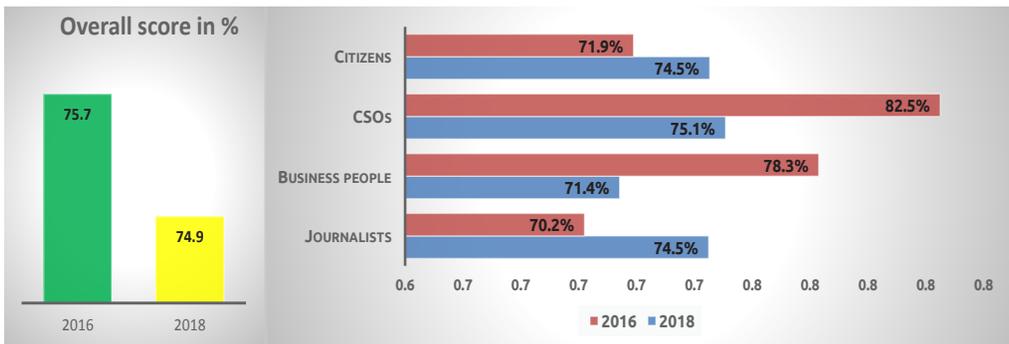
### 7.5 PSB engagement with the public and CSOs

The way public service broadcasting engages with the public and CSOs scored 78.8%, growing from 56.3% in 2016. Public and CSOs are engaged in different forms of debate, stimulate ideas and hold interactive discussions.

### 7.6 Safety of journalists

This sub-indicator increased from 70.6% in 2016 to 73.8% in 2018. The growth is partly due to increased trust between journalists and law enforcement organs through regular interactive meetings.

**Figure 8: Media as a platform for democratic discourse, comparison between RMB 2016 and 2018**



Source: Primary data and RMB 2016

As indicated in the figure above, there was a slight decline in the performance of the indicator from 75.7% in RMB 2016 to 74.9% in RMB 2018. The decline is due to the perception that some journalists are corrupt and therefore their professional conduct does not promote democratic discourse.

## Chapter 8: PROFESSIONAL CAPACITY BUILDING AND SUPPORTING INSTITUTIONS THAT UNDERPIN FREEDOM OF EXPRESSION

For the media to effectively deliver on its mandate, it should have practitioners that are professionally equipped with knowledge and skills.

This indicator measures whether the media sector works in by an environment with supportive institutions and organisations that provide services that individual media outlets are not able to provide on their own including; training, research, advocacy, promotion and defense of media freedom.

There are six sub-indicators measured under this indicator as indicated in the figure below.

**Figure 9: Summary of Indicator Four and sub-indicators performance**



Source: Primary Data

The score on perception of respondents on ‘capacity building institutions and their ability to provide needed training’ is rated at 68.4% for the RMB 2018, with 85.6% for ‘right to join media associations and exercise their rights’ as the highest rate while ‘media professionals access training appropriate to their needs’ is rated as the lowest at 53.2%.

Table 11: Perception on capacity building and institutions that underpin freedom of expression

Respondents	Journalists	Citizens	Overall	Rating
<b>AVERAGE</b>	<b>70.1</b>	<b>67.1</b>	<b>68.4</b>	
Media professionals access training appropriate to their needs	53.2		53.3	
Skills training to report on democracy and development	64.4		64.5	
The right to join media associations	85.6		85.7	
Professional associations advocate on behalf of their members	67.1		67.2	
Professional standards and stable working environment	75.1	67.1	71.2	

Source: Primary Data

As indicated in the above table, the overall score for the indicator is 68.4%, with the sub-indicator on ‘the right to join media associations’ rated highest at 85.6% while the perception on ‘media professionals access training appropriate to their needs’ has the lowest score at 53.2%.

### 8.1 Media professionals access training appropriate to their needs

Findings indicate that the sub-indicator on ‘journalists access the type of training needed to perform their roles’ stands at 53.2%. This is still low but shows significant improvement from 39% in RMB 2016.

### 8.2 Skills training to report on democracy and development

The RMB 2018 overall rating of on the sub-indicator of ‘skills training to report on democracy and development’ is 64.4%, a decline from 2016 rating of 67.5%.

### 8.3 The right to join media associations

There has been a significant improvement in the perception of journalists’ right to join media associations, as demonstrated in the above table, ranked at 85.6% up from 66.6% in 2016.

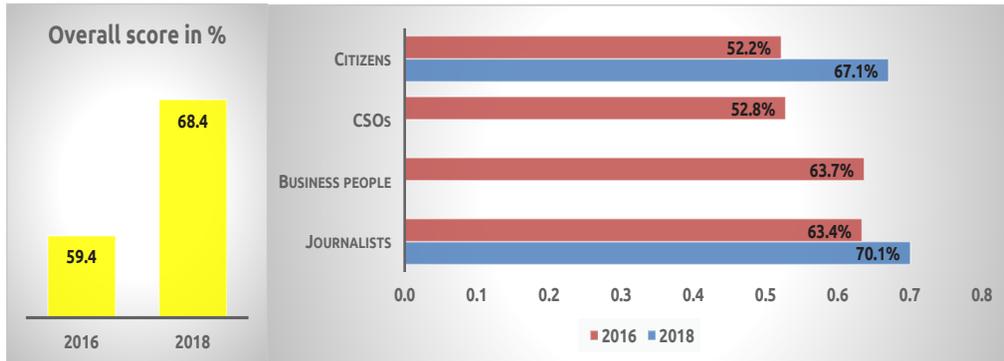
### 8.4 Professional associations advocate on behalf of their members

Providing advocacy on behalf of the media fraternity by professional association is a function that has been positively considered, where 67.1% of journalists interviewed agree that the Media Self-Regulatory Body and media associations are playing the role satisfactorily.

### 8.5 Professional standards and stable working environment

Meeting professional standards of quality sub-indicator grow from 64.2% in 2016 to 71.2% in 2018. Nevertheless, there is a need to have continuous building of capacity and skills. This sub-indicator also considered journalists’ welfare whereby it was established that 60.5% of journalists do not have social security and medical insurance cover, 32.3% do not have formal contracts and 32% do not get their salaries on time.

**Figure 10: Capacity building and institutions that underpin freedom of expression, comparison between 2016 and 2018**



Source: Primary data and RMB 2016

The figure above shows there was overall growth of the indicator from 59.4% in 2016 to 68.4% in 2018. The growth in the rating is due to access by journalists to various training programs.

## Chapter 9: ECONOMIC DEVELOPMENT LEVELS AND INFRASTRUCTURE CAPACITY TO SUPPORT INDEPENDENT AND PLURALIST MEDIA

The media environment world over has become dynamic, competitive and IT driven. New technologies for newsgathering, production and distribution call for media practitioners to have access and the capacity to efficiently use them.

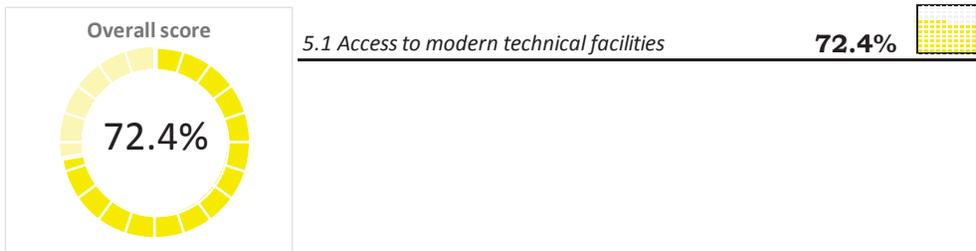
This indicator measures whether media practitioners have access to and familiar with modern technical facilities for newsgathering, production and distribution.

One sub-indicator ‘Access to modern technical facilities’ was measured under this indicator.

Access to modern technical facilities for newsgathering, production and distribution scored 72.4% in 2018, up from 71% in 2016.

Journalists rate this sub-indicator at 76.0%, business community at 66.5%, and 60.1% among CSOs.

**Figure 11: Summary of RMB 2018 Indicator Five and sub-indicator performance**



**Source: Primary Data**

As shown in the above figure, one sub-indicator ‘Access to modern technical facilities’ was measured and scored 72.4%.

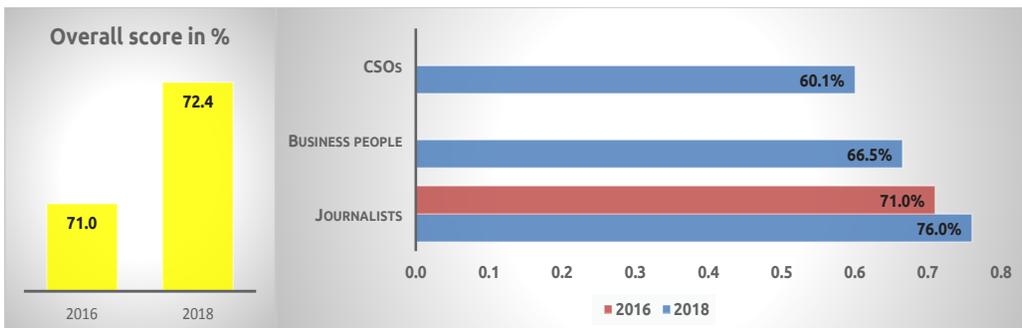
Table 12: Access to modern technical facilities

ICT Use	Strongly disagree (%)	Disagree (%)	Agree (%)	Strongly Agree (%)	Don't know (%)
Journalists use ICT in access and spread of information	1.9	3.2	68.2	20.5	6.2
There is enough ICT infrastructure to facilitate media	3.5	24.2	54.5	5.5	11.9

Source: Primary data

As indicated in table 13, more than 80% of the respondents strongly agree that journalists use ICT in accessing and distribution of information.

Figure 12: Perception on Economic development levels and infrastructure capacity to support independent and pluralist media, comparison between the 2016 and 2018 RMBs



Source: Primary data and RMB 2016

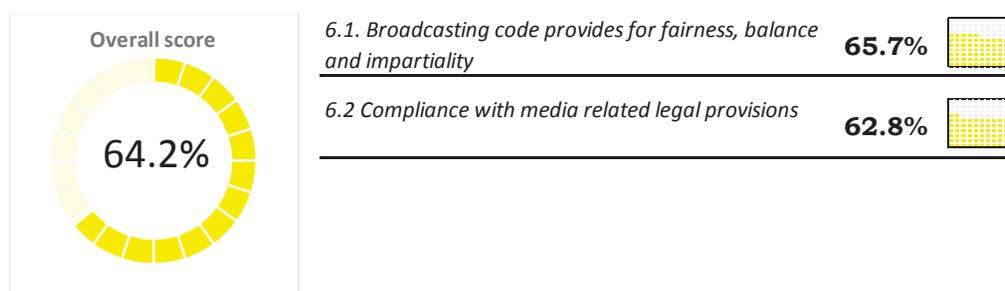
The above figure shows there was improvement in the perception on ‘economic development levels and infrastructure capacity to support independent and pluralist media,’ from 71.0% to 72.4% in 2018. The improvement in rating is attributed to improved access to modern technologies, migration from analogue to digital broadcasting and use of ICT for gathering and dissemination of information.

## Chapter 10: LEVEL OF COMMITMENT AMONG MEDIA PRACTITIONERS TO JOURNALISM PROFESSIONAL CODES OF CONDUCT AND RATE OF COMPLIANCE WITH MEDIA RELATED LEGAL PROVISIONS

This indicator measures media’s responsibility towards the public and enhancing the quality of the media through following established codes of conduct.

The media must be held accountable if they are to play their role as a watchdog of authorities and other powerful stakeholders. (UNESCO, 2011).

Figure 13: Summary of Indicator Six and sub-indicators performance



Source: Primary data

As indicated above, the indicator overall score is 64.2%, where sub-indicators “Broadcasting code provides for fairness, balance and impartiality” and “Compliance with media related legal provisions” scored 65.7% and 62.8% respectively.

Table 13: Perception on level of commitment among media practitioners to journalism professional codes of conduct

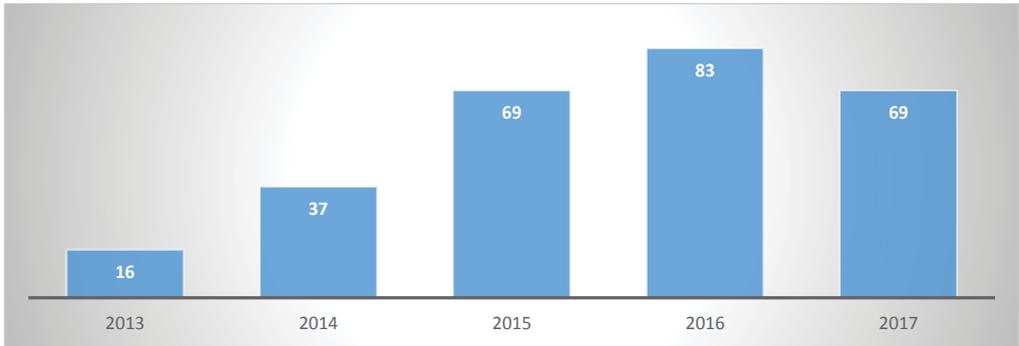
Respondents	Journalists	Business Community	CSOs	Overall
AVERAGE	66.4	57.8	58.9	64.2
Broadcasting code provides for fairness, balance and impartiality	68.8	57.3	58.9	65.7
Compliance with media related legal provisions	64.1	58.3		62.8

Source: Primary data

As indicated in the above table, the overall score was 64.2%, where journalists scored 66.4%, 57.8% for business community and 58.9% for CSOs.

The Media Self-Regulatory Body has been instrumental in mediating between journalists and other stakeholders in the sector as indicated in the figure below.

**Figure 14: Summary of number of complaints adjudicated by the Media Self-Regulatory Body between 2013 and 2017**



**Source: The Media Self-Regulatory Body report, 2017**

The figure above shows the number of complaints adjudicated by the Media Self-Regulatory Body between 2013 and 2017. The rise in the number of complaints handled shows that there are still cases of unprofessional conduct but also indicates that journalists and the general public have trust in the body.

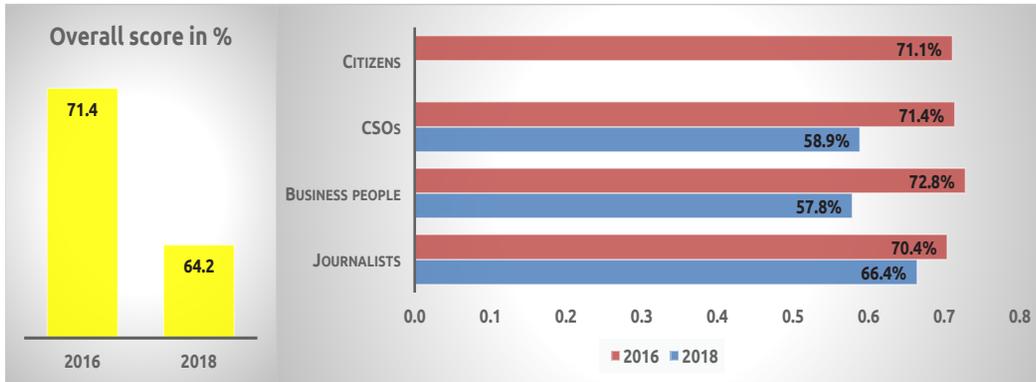
### 10.2 Broadcasting code provides for fairness, balance and impartiality

The sub-indicator score was 65.7% where 68.8% of journalists believe there is effective observation of code of ethics, setting out requirements for fairness, balance and impartiality, whereas 57.3% of the business community and 58.9% of CSOs think in that direction.

### 10.3 Compliance with media related legal provisions

The perception on compliance with media related legal provisions scored 62.8% where journalists rated 64.1% and 58.3% among members of the business community.

Figure 15: Perception on level of commitment among media practitioners to journalism professional codes of conduct, comparison between the 2016 and 2018 RMBs



Source: Primary data and RMB 2016

The figure above shows a decline in rating of the indicator from 71.4% in 2016 to 64.2% in RMB 2018. The decline in rating is attributed to the high number of complaints against unethical conduct of journalists. Information from Rwanda Media Self-Regulatory Body indicates that in 2017, there were 69 total complaints against journalists' unethical conduct. This indicates that there is still violation of code of ethics.

## Chapter 11: MEDIA AVAILABILITY AND ACCESS TO INFORMATION FOR CITIZENS

Media availability and access are important aspects of media development as they define whether there is effective consumption of media products. The information so delivered should be in languages citizens they can read, hear and understand (RMB, 2016).

This indicator measures availability of the media and citizens' ability to access information

Four sub-indicators are measured under this indicator as shown in the figure below.

Figure 16: Summary of Indicator seven and Sub-indicators performance



Source: Primary data and RMB 2016

The figure above shows the overall score is 76.4%, where media contribution towards building a knowledgeable society has the highest score at 79.9%.

Table 14: Media availability and access to information for citizens

Respondents	Journalists	Citizens	Overall	Rating
<b>AVERAGE</b>	<b>68.0</b>	<b>79.2</b>	<b>76.4</b>	
Availability of media and enabling facilities to citizens	68.0	86.3	<b>74.9</b>	
Promoting Culture and Kinyarwanda		74.9	<b>74.9</b>	
knowledgeable society		79.9	<b>79.9</b>	
Promoting Sport and entertainment		75.8	<b>75.8</b>	

Source: Primary data

As the table above shows, the score of media availability and access to information for citizens is 76.4%, registering a good improvement from 66.5% in 2016. The scores by respondents' categories were; 79.2% for citizens and 60.0% for journalists. The improvement is attributed to

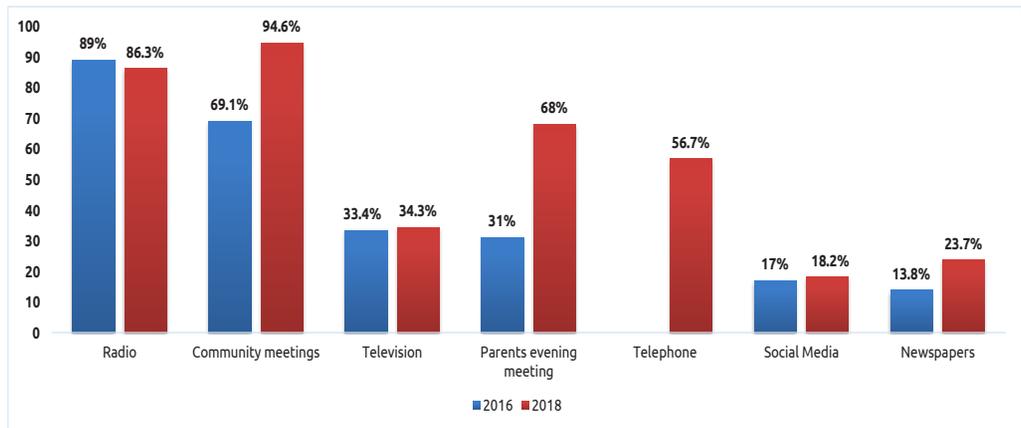
enactment of the access to information law, popularization of citizen-focused reporting, awareness campaigns on access to information and increased mobile phones penetration.

### 11.1 Availability of media and enabling facilities to citizens

The average performance of this sub indicator is 77.2%, rating highly among citizens at 86.3% and 68% among journalists.

Radio, community meetings, television, parents evening meetings, telephones, social media and newspapers are the platforms through which citizens get news and share information as shown in the figure below.

**Figure 17: Type of media citizens use to get news and information between the 2016 and 2018 RMBs**



Source: Primary Data & RMB 2016

As indicated in the figure above, community meetings organized for citizens are an important platform for information sharing, leading with a rating of 94% by the citizens followed by radio at 86.3%. Accessing news and information through television is registering gradual growth from 33.4% in 2016 to the current 34.3%. Parents’ evening meetings have also gained in importance of information sharing with a rating of 68%. The increased access to telephones also contributes to the growing use of social media as source of news while telephone headsets with radio applications also avail news and information access opportunities.

### 11.2 Promotion of culture and Kinyarwanda

The promotion of Kinyarwanda through media platforms is a sub-indicator that was considered for the first time in RMB 2018 in line with nurturing, preserving and protecting Rwandan culture as an effective mechanism for the realization of the country’s development goals. The sub-indicator scored 74.9%.

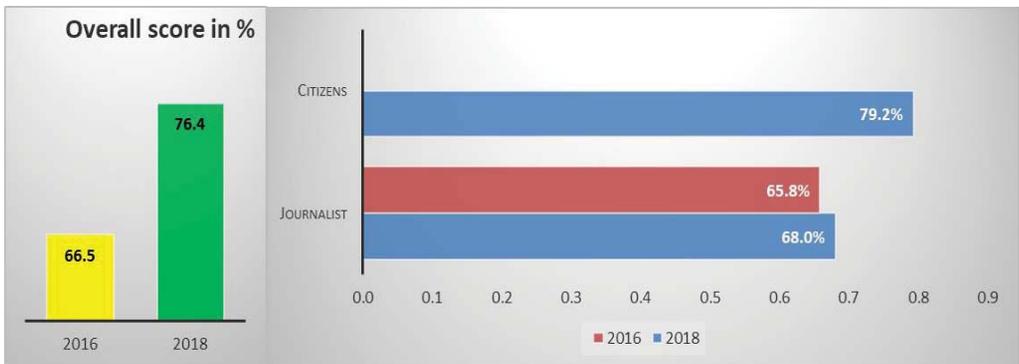
### 11.3 Educating citizens

Rwanda has got a strategic ambition among its development aspirations of realizing a knowledge-based economy. Supporting the promotion of knowledgeable society is in line with that development agenda. The sub-indicator is rated at 79.9%.

### 10.4 Promoting Sports and entertainment

Sport plays a significant role in the development of communities; it brings people together to interact, play and engage in conversations that build social harmony. Sports positively impacts on social development and economic sustainability; they empower people and teach leadership and citizenship skills while inculcating cooperation toward shared goals. They challenge inequalities in gender, race and disabilities and can be a means to educate young people against anti-social behaviour (GoR, 2012). Sports is good for health and a healthy population is productive. The sub-indicator scored 75.8%.

Figure 18: Access to information, comparison between the 2016 and 2018 RMBs



Source: Primary Data

As indicated in the above figure, there was significant improvement in the performance of the indicator, 'media availability and access to information for citizens' from 66.5% in 2016 to 76.4% in 2018.

## Chapter 13: LEVEL OF PUBLIC TRUST IN MEDIA

The indicator measures whether media plays its principal objective of serving public interest through unbiased delivery of information, serving as a voice of citizens. When other interests surpass the cardinal role of serving public interest, then media falls short of playing its role and its trust among the public diminishes.

This is a new indicator that was not previously measured. The introduction of the indicator was necessitated by the need to measure the level of public trust in media after 1994 genocide against the Tutsi because citizens had lost trust in media as it played a key role in inciting people to

commit genocide. It was introduced to also measure public trust in media in an environment globally affected by unethical conduct, economic and political interests leading to public mistrust of media. The credibility of a media house is dependent on the conduct of its journalists and how knowledgeable, objective, accurate, impartial and ethical they are in the information they present to the public (Gicheri, 2014).

Four sub-indicators were considered under this indicator as summarized in the figure below

Figure 19: Summary of Indicator Eight and sub-indicators performance



Source: Primary Data

The overall performance of Public Trust in the Media stands at 75.3%. The best score among all sub-indicators is registered at 78.4% indicating a high trust of public in advocating for citizens' complaints.

Respondents confirm that the level of public trust in media is satisfactory. This is reflected by the high rating of citizens' trust, advocacy on citizens' complaints, Advocacy for respect of human rights and promoting wealth and social welfare.

Table 15: Summary of public trust in media by categories of respondents

Respondents	Business Community	CSOs	Citizens	Overall
<b>AVERAGE</b>	65.2	69.1	76.9	<b>75.3</b>
Citizens trust in media	65.2	69.1	76.9	73.0
Advocacy on citizens' complaints			78.4	78.4
Upholding respect of human rights			75.4	75.4
Promoting wealth and social welfare			74.3	74.3

Source: Primary Data

### 11.1 Citizens trust in the media

The average score of whether citizens have trust in media is 73.0%, of which rating by categories is; 76.9% for citizens, 69.1% for CSOs and 65.2% for the business community.

### 11.2 Advocacy on citizens' complaints

This sub-indicator scored 78.4%. Media houses have adopted programmes and reporting that are citizen-centered, enabling them (citizens) to air their views and problems, obliging leaders concerned to respond with practical solutions.

### 11.3 Advocacy for respect of human rights

Citizens' perception on the role of media in promoting human rights in Rwanda stands at 75.4%. This can be explained by the fact that citizens have trust in media as it plays an advocacy role in addressing their grievances.

### 11.4 Promoting wealth and social welfare

An average of 74.3% of the citizens believe the media messages promote wealth creation and social welfare. Media programs educate and inform the general public on issues relating to increasing their incomes and improving their livelihoods.

## CHAPTER 14: CONCLUSIONS AND RECOMMENDATIONS

The Rwanda Media Barometer, since its inception in 2013, has grown into an important tool that shapes the direction of media sector development. Drawing from different categories of respondents, the results are as much representative as possible. Both qualitative and quantitative methods were used in elaborating the RMB 2018.

Results of RMB 2018 indicate that there is full potential for the media to play its role in engaging more actively with citizens to increase public awareness, promote good governance practices and providing a platform for citizens' demand for quality services and accountability.

As illustrated in the findings, there has been an overall improvement in media performance as assessed under the RMB indicators, from 69.6% in 2016 to 72.4% in 2018, representing a growth of 2.8%.

There was improvement in performance among three of the measured indicators with **Media availability and Access to Information for Citizens** showing the greatest improvement from 65.8% in 2016 to 76.4% in 2018, representing 10.6% growth. **Professional Capacity Building and Supporting Institutions that Underpin Freedom of Expression** grew by 9% between 2016 and 2018, from 59.4% to

68.4%, respectively. **Plurality and Diversity of Media, a Level Economic Playing Field and Transparency of Ownership** grew by 4.1% from 62.2% in 2016 to 66.3% in 2018.

Performance of the newly introduced indicator of **Level of Public Trust in Media**, is rated at 75.3%, falling in the category of High Performance.

Three of the measured indicators registered retrogression. **Level of Commitment among Media Practitioners to Journalism Professional Codes of Conduct and Rate of Compliance with Media Related Legal Provisions** dropped from 71.4% in 2016 to 64.2% in 2018.

Whereas there was a decline in performance of the indicator on **System of Regulation Conducive to Freedom of Expression, Pluralism and Diversity of the Media**, from 82.2% in 2016 to 81.3% in 2018, the rating is still in the category of Very High Performance.

The indicator on **Media as a Platform for Democratic Discourse** fell from 75.7% in 2016 to 74.9% in 2018.

Despite the overall growth, gaps and challenges have been identified and recommendation made to inform policy direction, investment and funding.

Table 16: Summary of challenges/gaps and recommendations

Indicator N°	Indicator	Gap/challenge	Recommendation	Implementing Institution(s)
1	A system of regulation conducive to freedom of expression, pluralism and diversity of the media	Though the indicator scored highly, there is still a gap on the “Right to information”, as indicated by the low satisfaction among journalists, CSOs and business community.	Increase awareness on the Access to Information Law and accompanying ministerial orders	Office of the Ombudsman, MINALOC, RALGA, PSF, Media Associations, OGS, The Media Self-Regulatory Body, RGB
			Expand internet and electricity connectivity to increase TV penetration and access to other sources of digital media platforms.	MININFRA, RURA MiTEC, EDCL
2	Plurality and diversity of media, a level economic playing field and transparency of ownership	Perception that the state discriminates media houses in awarding advertisements.	Media houses should be sensitized on public procurement processes	RPPA, RGB
			Create awareness among media houses about the changing advertising and market trends	RPPA, The Media Self-Regulatory Body, MHC, RGB
3	Media as a platform for democratic discourse	Corruption tendencies are still observed among journalists	There is need to emphasize compliance with professional code of conduct and ethics	The Media Self-Regulatory Body, Media Associations, Office of the Ombudsman, RGB
4	Professional capacity building and supporting institutions that underpin freedom of expression.	Journalists lack adequate training programs that meet their needs.	Media capacity building programs should be tailored to meet the needs of media professionals and changing media sector dynamics.	MHC, Media Associations, Media Self-Regulatory Body, Media training institutions, RGB
			Encourage Schools of Journalism to focus on practical skills training that conforms to the job market demand.	MINEDUC, HEC, Universities, MHC, RGB

CONCLUSIONS AND RECOMMENDATIONS

	Journalists work in an environment where majority experience delayed remuneration, have no job contracts and are not covered under the social security scheme	Review Standard Operating Procedures for media houses to enhance their business operations,	RURA, Media Self-Regulatory Body, ARJ, MIFOTRA, RSSB, RGB
		Improve management of financial and human resources	
		Adhere to labour laws	Media houses
		Support initiatives aimed at media mergers for a strong and financially viable sector	MHC, Media Self-Regulatory Body, Media Associations, RGB
		Support initiatives by journalists to establish a media savings and credit scheme to improve media business and journalists' welfare  Create awareness among media houses on the need to be innovative so as to improve competitiveness and profitability	MHC, Media Self-Regulatory Body, Media Associations

6	Level of commitment among media practitioners to journalism professional codes of conduct and rate of compliance with media related legal provisions	There is continued violation of journalists' code of ethics	<p>There is need to continuously sensitize journalists on compliance with the journalistic code of ethics and professionalism</p> <p>Encourage media houses to establish internal self-regulatory mechanisms and code of conduct</p>	The Media Self-Regulatory Body, Media Associations, RGB
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