



Rwanda

Media Barometer 2021

THE STATE OF MEDIA DEVELOPMENT IN RWANDA



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Rwanda

Media Barometer 2021

THE STATE OF MEDIA DEVELOPMENT IN RWANDA

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 Rwanda Governance Board

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ABBREVIATIONS AND ACRONYMS

| | |
|----------------|--|
| ARJ | Rwanda Journalists Association |
| CSOs | Civil Society Organization |
| FGD | Focus Group Discussion |
| GoR | Government of Rwanda |
| ICT | Information Communication Technology |
| ITU | International Telecommunications Union |
| KII | Key Informant Interview |
| MHC | Media High Council |
| MINALOC | Ministry of Local Government |
| MINICT | Ministry of ICT and Innovation |
| NGO | Non-Government Organization |
| NHCR | National Commission for Human Rights |
| NISR | National Institute of Statistics of Rwanda |
| ORINFOR | Office Rwandais d'Information (National Office for Information) |
| PB | Public Broadcaster |
| PWDs | People With Disabilities |
| 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 |
| UNESCO | United Nations Educational, Scientific and Cultural Organization |

We are pleased to present the Rwanda Media Barometer (RMB) 2021. RMB is a publication of Rwanda Governance Board initiated in 2013. It serves as a scientific and reliable tool to measure the state of media in Rwanda with an aim of promoting professional, vibrant and responsible media.

The RMB 2021 is the fourth edition and is built on five indicators namely; (i) Legal and Policy Framework, (ii) Media Plurality and Diversity, (iii) Media as a platform for Strengthening Governance and Democracy, (iv) Media Development and Professional Capacity and (v) Access to Information. Some adjustments were made on some indicators to strengthen their measurement, analysis and clarity in their

interpretation. The findings of this edition show that the overall performance of media development is 80.6%. This demonstrates sustained growth of the media sector from 60.7% in 2013, 69.6% in 2016 and 72.4% in 2018. The positive trend is a result of efforts invested by the government and stakeholders in the development of the media sector.

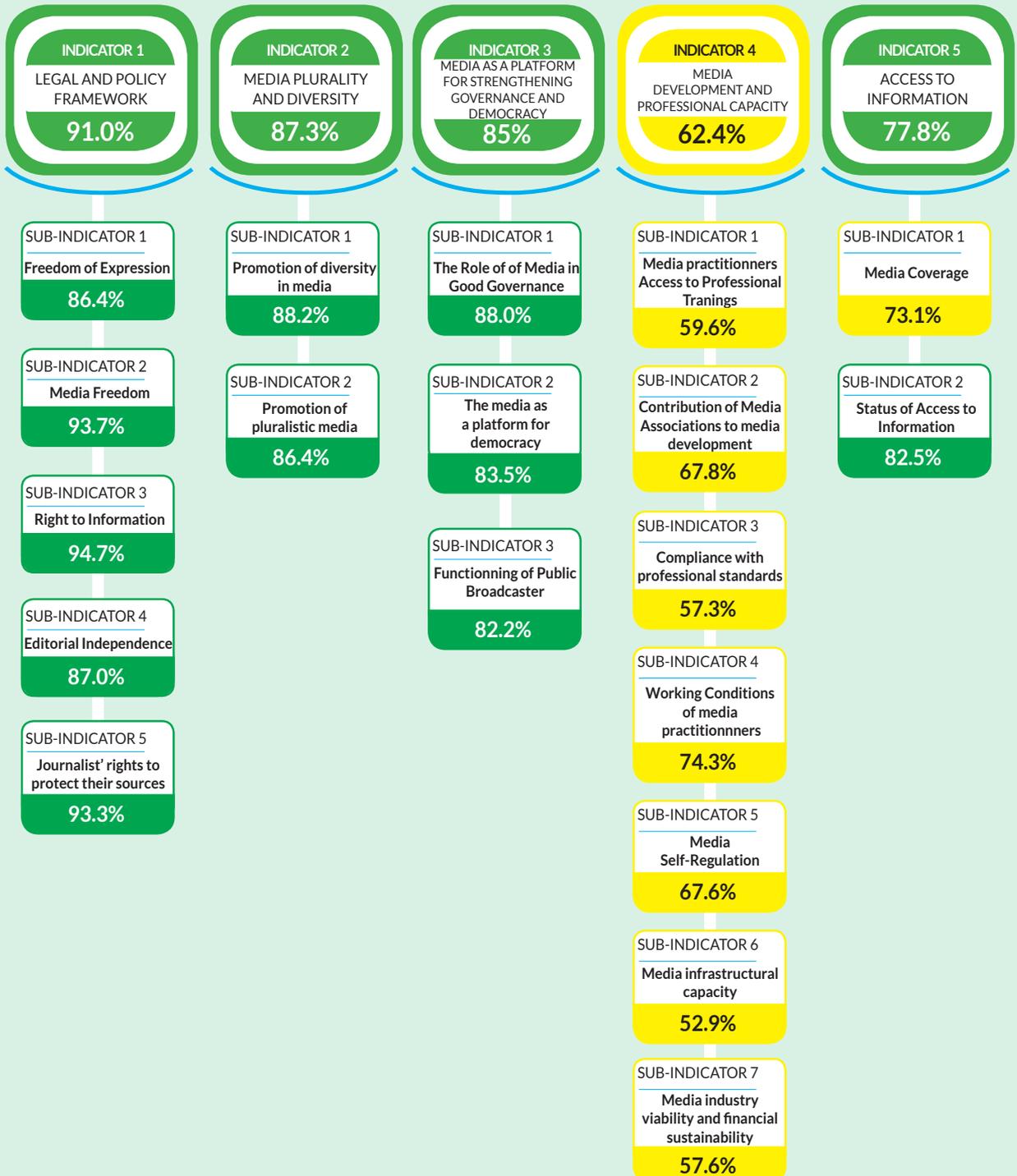
The highest performing indicator of this barometer is the Legal and Policy Framework with a score of 91.0% while the least performing indicator is Media Development and Professional Capacity with a score of 62.4%. Despite the visible progress in the media sector development, financial sustainability remains a major challenge to the development

of the sector.

The Rwanda Governance Board will continue to support media houses and associations to be more professional, accountable and self-reliant. We also hope that findings of the RMB 2021 will guide interventions meant to empower the media to serve the citizens. We take this opportunity to appreciate the financial support of One-UN in media sector development in Rwanda. We also acknowledge the contribution of the media fraternity and other stakeholders in the production of this barometer.

Dr. KAITESI Usta
Chief Executive Officer

SUMMARY OF RMB 2021 FINDINGS



EXECUTIVE SUMMARY

Rwanda Media Barometer (RMB) 2021 is built on five indicators namely; (i) Legal and Policy Framework, (ii) Media Plurality and Diversity, (iii) Media as a platform for Strengthening Governance and Democracy, (iv) Media Development and Professional Capacity and (v) Access to Information. These indicators are composed of 19 sub-indicators and 66 variables.

In the RMB 2021, significant changes were made in terms of formulation and number of indicators and sub-indicators. As a result, the number of indicators and sub-indicators reduced from 8 to 5, and 32 to 19 respectively. Some indicators and sub-indicators were renamed, and for the first time, variables were introduced, at the lowest level of measurement, to capture key aspects of the media sector development that were not considered in previous editions. This adjustment aimed at streamlining the study with the media environment in Rwanda.

The overall score of the Rwanda Media Barometer 2021 is 80.6%. The indicator of Legal and Policy Framework recorded the highest performance with a score of 91%, followed by Media Plurality and Diversity (87.3%), Media as a Platform for Strengthening Governance and Democracy (85.0%) and Access to Information (77.8%). The lowest performing indicator in this edition is Media Development and Professional Capacity that scored 62.4%.

The RMB 2021 highlights areas that performed well such as the media regulatory environment and citizen satisfaction with the role of media in promoting good governance and democracy. On the other hand, the study identified challenges impeding media sector development particularly related to media profitability, infrastructural capacity, professionalism and accountability among media practitioners.

1. GENERAL INTRODUCTION

The RMB 2021 is the 4th edition of the publication, following the 2013, 2016 and 2018 editions. This RMB edition comes amidst the digital disruption driven by the internet. With the increasing access to internet and other ICT tools, access to information has become easier but the most significance change is that content creation is not anymore a monopoly of the mainstream media. On one hand, this allows users to follow any number of possible paths to share, locate and retrieve information according to their interests and inclinations. On the other hand, consumers of media content are swimming in a sea of information some of which come from unreliable sources or intended to deceive.

The digital disruption also affected the gains that had been brought about by the media laws of 2002, 2009 and 2013 and media reforms initiated in 2011. Print media was hit the most as newspapers almost disappeared on the market because of dwindling advertising revenues and readers' choice for online sources that are cheaper and convenient.

1.1. Objective of RMB 2021

The Rwanda Media Barometer 2021 measures the state of media development in Rwanda. It provides information on whether existing laws, policies and infrastructures help the media to properly deliver on its mandate of informing, educating and entertaining the public. The barometer also discerns the perceptions of media consumers regarding the quality of the content aired, published or telecasted as well as the extent to which legal instruments promoting access to information, freedom of expression and media freedom have created a conducive environment for effective public debate, transparency and accountable governance. Findings provide contextual and institutional conditions and evidence-based information about media development in Rwanda.

Specifically, this study intended to:

- i. Measure the level of the exercise and public satisfaction with freedom of expression, press freedom and access to information with regard to national laws, policy and international instruments ratified by Rwanda;
- ii. Discern the status of media plurality and diversity in terms of their programming, content and ownership; and check whether existing laws and policies prevent media concentration;
- iii. Assess the role of media in promoting good governance principles including transparency, accountability, unity, gender equality and public debate;
- iv. Assess whether the media sector is well equipped in terms of needed financial and human resources as well as infrastructure capacity to properly discharge its duties of informing, educating and entertaining the public;
- v. Identify skills available that move the sector forward as well as skills gaps;
- vi. Assess media industry in Rwanda vis-à-vis the requirements of professional enterprises, business planning, organizational structure, staff management, financial sustainability, and professional solidarity;
- vii. Establish the impact of media reforms with particular focus on media self-regulation, access to Information and transformation of the state owned broadcaster into a public broadcaster;
- viii. Assess the availability and accessibility of Media which citizens use to get information;
- ix. Determine the level of public trust in

various types of media platforms including social media;

- x. Make recommendations which will guide interventions meant to improve media development in the country.

1.2. Rwanda Media Landscape

The media in Rwanda has seen tremendous growth over the past two decades owing to consistent efforts by the Government of Rwanda, through enacting a number of media reforms and support from stakeholders to build a vibrant media sector.

The 2013 media reforms resulted in an increase of broadcast media houses. As of December 2020, there were 39 FM Radio stations and 20 television stations operating in Rwanda (RURA, 2020). Furthermore, the evolution of ICT led to a boom in the number of online publications and social media that surpassed traditional media and transformed information dissemination and consumption.

These media reforms included a number of media related laws namely; a new media law that introduced self-regulation, the law on access to information and the law that

transformed the then state broadcaster into a public broadcaster.

In the area of capacity building, Rwanda has five higher learning institutions offering journalism and communication trainings. These are the School of Journalism and Communication at the University of Rwanda, the School of Journalism and Communication at the Catholic Institute of Kabgayi, School of Communication and Journalism at the University of Kigali, the Faculty of Mass Communication at Mount Kenya University-Rwanda and the Faculty of Mass Communication at the East African University. The law establishing the Media High Council with the mandate of strengthening capacity of the media sector was repealed in 2020 and part of its mandate was transferred to the Rwanda Governance Board.

The media sector was not spared by the digital disruption that transformed the global socio-economic system. It is in this context, that the RMB 2021 was conducted and its findings reflect registered progress in media development, existing challenges and possible solutions shaped into recommendations.

2. METHODOLOGY

This section focuses on how the RMB 2021 was produced. It describes the approaches employed for both desk research and primary data collection. Desk research involved analysis of administrative data and review of documents from various institutions. Primary data collection entailed both quantitative and qualitative approaches, using questionnaire, individual interviews and focus group discussions.

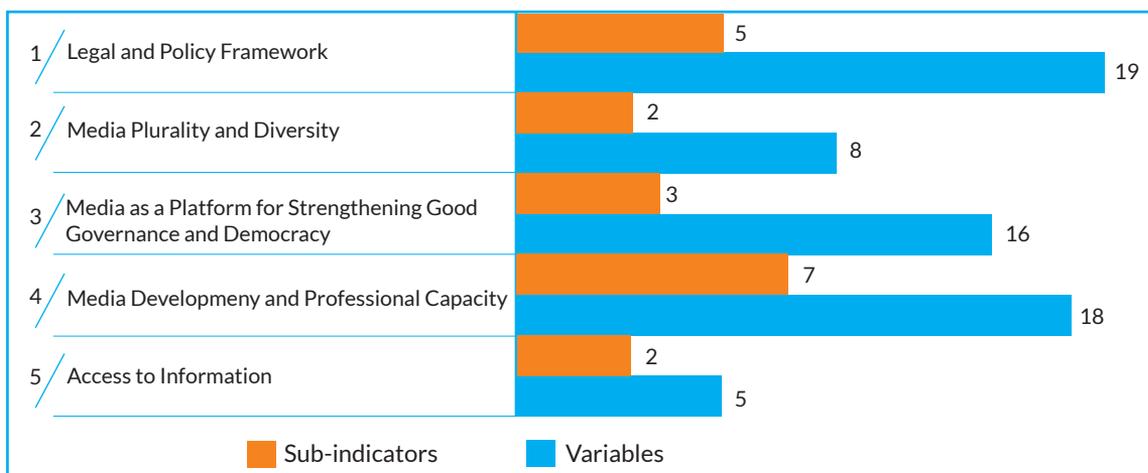
2.1. Indicator framework

In the current barometer, the indicator framework has been revised to reflect international standards of measuring media development such as UNESCO development indicators and specific country reports on media development. Equally, the review was justified by the need to adapt the barometer

to the local context and better inform readers about media development in Rwanda.

Indicators and sub-indicators were restructured while variables were for the first time introduced to better capture both primary and secondary data. Correspondingly, the RMB 2021 comprises 5 indicators, 19 sub-indicators and 67 variables. In comparison with RMB 2018, the number of indicators changed from 8 to 5, while the number of sub-indicators reduced from 32 to 19. Some elements previously measured at indicator and sub-indicator level were assessed at variable level. The following figure indicates the number of sub-indicators and variables per indicator.

Figure 1: Number of sub-indicators and variables per indicator



2.2. Approaches and data collection instruments

To conduct the RMB 2021, both quantitative and qualitative approaches were used. The quantitative approach involved the use of structured questionnaires while the qualitative approach combined desk research, Key Informant Interviews (KIIs) and Focus Group Discussions (FGDs).

2.2.1. Desk review

Desk review involved scrutiny of existing laws, policies, reports and other publications pertaining to the regulation and the state of the media in Rwanda. The desk study was preceded by an appropriately pre-designed template capturing all the pertinent issues under review.

2.2.2. Questionnaire

Quantitative data were collected using two types of questionnaires that were developed and administered to the target respondents including citizens, journalists and media CSOs.

2.2.3. Focus Group Discussions

To better comprehend quantitative data, one Focus Group Discussion (FGD) was conducted. It was organised into selected homogeneous groups such as media experts, media managers and representatives of CSOs.

2.2.4. Key Informant Interviews

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 the 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 the media, media experts and media practitioners. Apart from discussions on the overall state of media in Rwanda, Key Informant Interviews (KII) also focused on the role of different stakeholders in promoting media development in Rwanda.

Both KIIs and FGDs helped get insights and meaning of figures from the questionnaires. Appropriate interview and focus group discussion guides were developed to facilitate both exercises.

2.3. Sampling method

The population for the RMB 2021 was made up of citizens, journalists and media CSOs for quantitative survey. The sampled respondents were 652 for the category of citizens. The population of journalists was divided into strata hence the use of stratifying simple random sampling with homogeneous characteristics of journalists within their respective strata. The total population of journalists was 1,267 with equal likelihood of being selected. This meant that a probabilistic or random selection was applied to all journalists. The strata were formulated on the basis of type of media outlet that each journalist is affiliated to.

Based on the above statements, the total population was less than 20,000. Therefore, the overall sample size n and margin of error E are given by:

$$x = Z(c/100)2r(100-r)$$
$$n = N x / ((N-1) E^2 + x)$$
$$E = \text{Sqrt} [(N - n) x / n (N-1)]$$

Where:

N is the population size (1,267),

r is the response rate (0.88) that we are interested in,

$Z(c/100)$ is the critical value for the confidence level c .

Thereafter, the overall sample size becomes 144 journalists. Equally, the population of CSOs is 692 and has a response rate of 0.99. This entails a sample of 15 CSOs operating in the media sector with members who possess the same characteristics as journalists. This sample was added to that of journalists to form one category of journalists and media CSOs. The applied formula provided a minimum sample of 159 journalists and media CSOs combined and, after data cleaning the applied sample size became 165.

Sample distribution

Details of sample size for each category of respondents are presented in the table below.

Table 1: Sample size

| Category | Population size | Population proportion | Sample size |
|-------------------------------|-----------------|-----------------------|-------------|
| 1. Citizens | | | 652 |
| 2. Journalists and media CSOs | 1,959 | | 159 |
| • Newspapers | 168 | 0.13 | 19 |
| • Online | 239 | 0.20 | 29 |
| • Radio stations | 343 | 0.27 | 39 |
| • TVs | 194 | 0.15 | 21 |
| • Freelancers | 323 | 0.25 | 36 |
| • Media CSOs | 692 | 0.99 | 15 |

For the category of citizens, the sample was drawn from all Provinces and the City of Kigali where 10 districts were selected based on a set of criteria including rural and urban configuration as well as districts hosting community radios. Respondents were selected purposively considering those aged 18 and above and possessing a media device (radio set, TV set, Mobile phone) or consuming print media content.

As for journalists, the sample size of each sub-category was proportional to the number of journalists therein and respondents were obtained randomly within each population sub-category.

With regard to media CSOs, the selection was based on simple random sampling from its respective population and took into account the media sector as an area of intervention and geographic location.

2.4. Demographic information of respondents

RMB 2021 involved respondents from 10 sampled districts from all four provinces and the City of Kigali. The ten districts are Rubavu and Nyabihu in the Western Province, Musanze and Gicumbi in the Northern Province, Ngoma and Kayonza in the Eastern Province, Huye and Ruhango in the Southern Province as well as Nyarugenge and Kicukiro in the City of Kigali.

Table 2: Demographic characteristics for respondents

| | Journalists and Media CSOs | | Citizens | |
|--------------------------|----------------------------|------------|------------|------------|
| Indicator | N | % | N | % |
| Gender | 165 | 100 | 652 | 100 |
| Male | 128 | 77.6 | 377 | 57.8 |
| Female | 37 | 22.4 | 275 | 42.2 |
| Age groups | 165 | 100 | 652 | 100 |
| [18-30] | 70 | 42.4 | 236 | 36.2 |
| [31-35] | 35 | 21.2 | 101 | 15.5 |
| [36-40] | 27 | 16.4 | 92 | 14.1 |
| [41-45] | 13 | 7.9 | 71 | 10.9 |
| [46-50] | 11 | 6.7 | 44 | 6.7 |
| [51-55] | 5 | 3 | 35 | 5.4 |
| [56-60] | 4 | 2.4 | 30 | 4.6 |
| [61-65] | | | 22 | 3.4 |
| [66 and above] | | | 21 | 3.2 |
| Marital status | 165 | 100 | 652 | 100 |
| Single | 90 | 54.5 | 171 | 26.2 |
| Married | 75 | 45.5 | 417 | 64 |
| Widow | | | 28 | 4.3 |
| Illegally married | | | 29 | 4.4 |
| Divorced | | | 7 | 1.1 |
| Educational level | 165 | 100 | 652 | 100 |
| Primary | 3 | 1.8 | 286 | 43.9 |
| Post-primary (CERAI) | 1 | 0.6 | 54 | 8.3 |
| Secondary & TVET | 11 | 6.7 | 229 | 35.1 |
| University | 150 | 90.9 | 83 | 12.7 |
| Job category | 165 | 100 | | |
| Journalists | 148 | 89.7 | | |
| Media CSOs staff | 17 | 10.3 | | |

| | | | | |
|---------------------------------|------------|------------|--|--|
| Journalism qualification | 165 | 100 | | |
| Yes | 90 | 54.5 | | |
| No | 75 | 45.5 | | |
| Working experience | 165 | 100 | | |
| [1-5] | 56 | 33.9 | | |
| [6-10] | 70 | 42.4 | | |
| [11-15] | 27 | 16.4 | | |
| [16-20] | 8 | 4.8 | | |
| [21-25] | 1 | 0.6 | | |
| [26-30] | 3 | 1.8 | | |

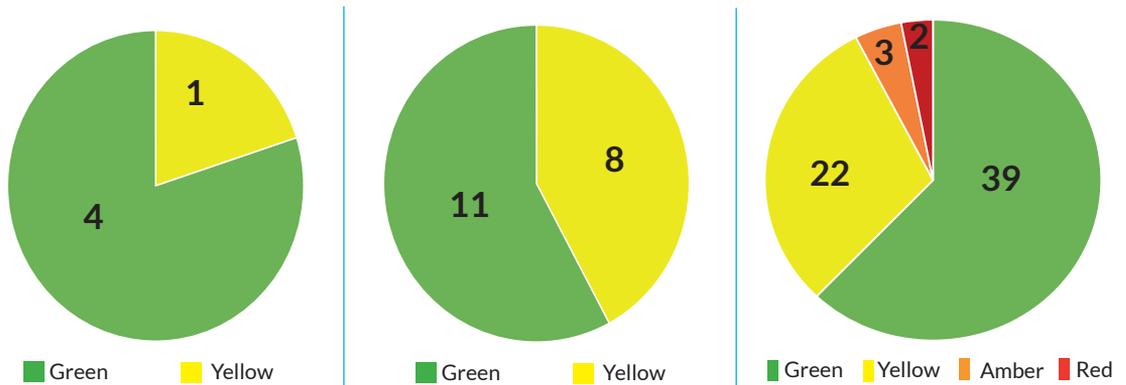
2.5. Ranking system

| Ranking Color code | Value in % |
|--------------------|------------|
| Green | 75-100 |
| Yellow | 50-74.9 |
| Amber | 25-49.9 |
| Red | 00-24.9 |

3. RMB 2021 FINDINGS

3.1. Highlights of RMB 2021

Figure 2: Performance of indicators, sub-indicators and variables



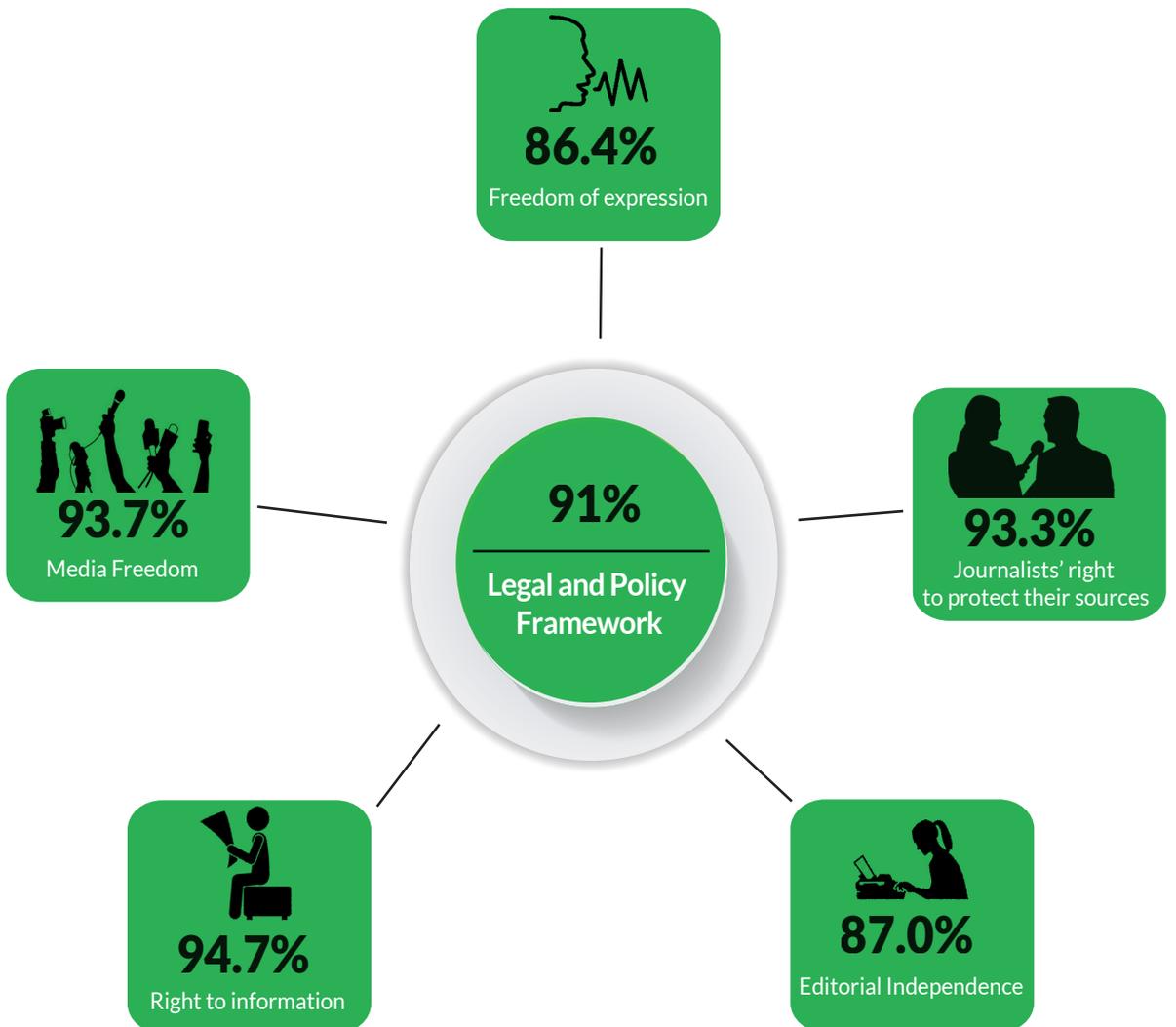
The RMB 2021 shows that four out of five indicators scored green and one indicator scored yellow. The indicators in green are “Legal and Policy Framework” (91%), “Media Plurality and Diversity” (87.3%), “Media as a Platform for Strengthening Governance and Democracy” (85.0%), and “Access to Information” (77.8%). The Media Development and Professional Capacity is the lowest performing indicator with a score of (62.4%).

Out of 19 sub-indicators, 11 scored green while the remaining 8 scored yellow. All sub-indicators under three indicators (Legal and Policy Framework; Media Plurality and Diversity and Media as a Platform for Strengthening Good Governance and Democracy) are in green. The indicator of Access to Information has one indicator in green while all the seven sub-indicators under the indicator of Media Development and Professional Capacity are ranked in yellow. The remaining sub-indicator in yellow is from the indicator of Access to Information.

The variables of “Accountable and Responsible Journalism” and “Media Profitability” and “Media Profitability” ranked red while three variables scored amber. These are “Technical Equipment facilitates inclusiveness of PWDs”, “Independence of the Media Self-Regulatory Body” and “Perception of Journalists on Qualification Requirement to Practice Journalism”. All the variables in red and amber are under the indicator of “Media Development and Professional Capacity”.



Legal and Policy Framework indicator



3.2. Legal and Policy Framework indicator

The indicator of “**Legal and Policy Framework**” aims at measuring the level of media development in relation to an enabling legal environment for the media to flourish and fulfil its primary functions of informing, entertaining and educating the public.

Five sub-indicators were measured under this indicator. The indicator scored very high with an overall score of 91%. The sub-indicator of “**Right to information**” registered the highest score (94.7%) while the sub-indicator of “**Freedom of Expression**” scored the lowest (86.4%) as shown in the table below:

Table 3: Detailed scores of the Indicator of Legal and Policy Framework

| Nº | SUB-INDICATOR | SOURCE OF DATA | SCORE |
|-----------------------------------|---|---|--------------|
| 1.1. Freedom of Expression | | | 86.4% |
| 1.1.1. | Freedom of Expression Reflected in Laws | Constitution, Access to Information Law | 100% |
| 1.1.2. | Citizen Awareness of Right to Freedom of Expression | Citizens Survey | 80.4% |
| 1.1.3. | Citizens Exercise their Freedom of Expression | Citizens Survey | 81.4% |
| 1.1.4. | Citizens Perception on the Respect of Freedom of Expression | Citizens Survey | 70.1% |
| 1.1.5. | Existence of Bodies which Guarantee the Application of Freedom of Expression | National Commission of Human Rights, Parliament, Office of the Ombudsman, Judiciary | 100% |
| 1.2. Media Freedom | | | 93.7% |
| 1.2.1. | Media Freedom and its Limits are Clearly Defined in Laws | Constitution, Law regulating media, Access to Information Law | 100% |
| 1.2.2. | The Exercise of Media Freedom | Journalists and Media CSOs Survey | 68.7% |
| 1.2.3. | Existence of Bodies which Guarantee the Application of Media Freedom | Judiciary, Self-Regulatory Body, Media Fraternity, CSOs | 100% |
| 1.2.4. | Legal Framework Guarantees the Right to Privacy and the Limits to Media Freedom | Access to Information Law, Penal Code | 100% |
| 1.2.5. | Decriminalization of Defamation in Media | Penal Code | 100% |

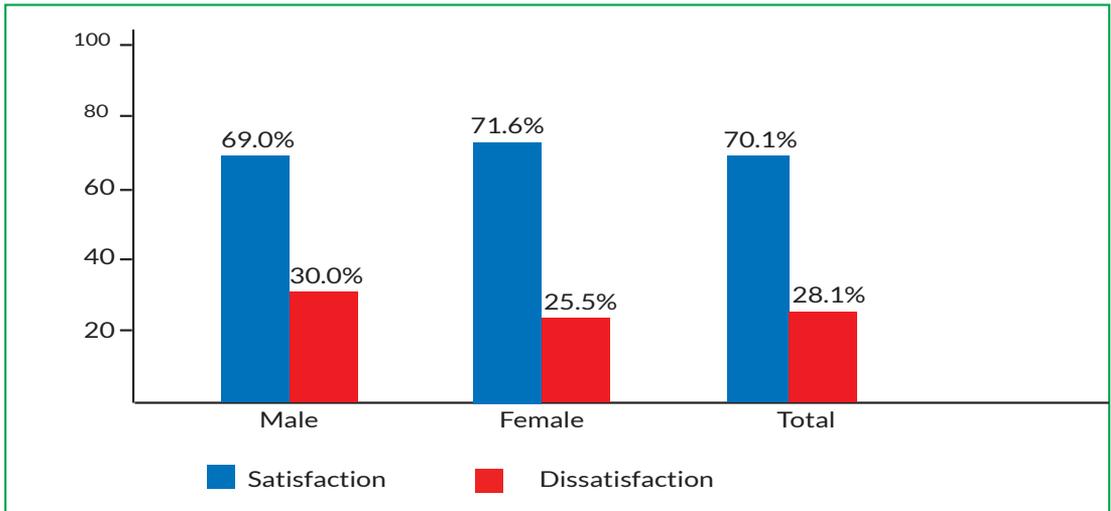
| | | | |
|---|---|---|--------------|
| 1.3. Right to Information | | | 94.7% |
| 1.3.1. | Right to Information is Guaranteed by the Law | Law Regulating Media, Access to Information Law | 100% |
| 1.3.2. | Public Awareness on the Right to Information | Citizens, Journalists and Media CSOs | 84.2% |
| 1.3.3. | Existence of Institutions which Guarantee the Right to Information | Judiciary, Office of the Ombudsman, NCHR | 100% |
| 1.4. Editorial Independence | | | 87.0% |
| 1.4.1. | Independence in Allocating Broadcasting Time and Program guaranteed by Law | Regulation governing Broadcasting services in Rwanda | 100% |
| 1.4.2. | Independence in Allocating Broadcasting Time and Program is Exercised | Journalists and Media CSOs survey | 82.4% |
| 1.4.3. | Independence of Broadcasters and Press to Determine Editorial Line is Guaranteed by Law | Media Law, Regulation governing Broadcasting services in Rwanda | 100% |
| 1.4.4. | Independence of Broadcasters and Press to Determine Editorial Line is Exercised | Journalists and Media CSOs survey | 65.5% |
| 1.5. Journalists' right to protect their sources | | | 93.3% |
| 1.5.1. | Legal Guarantee of the Right of Journalists to Protect their Sources | Law Regulating Media, Code of Ethics | 100% |
| 1.5.2. | Respect of the Right of Journalists to Protect their Sources | Journalists and Media CSOs survey | 86.5% |
| OVERALL SCORE | | | 91.0% |

3.2.1. Freedom of Expression

The sub-indicator of “Freedom of Expression” comprises five variables measuring the existence of laws and bodies guaranteeing freedom of expression, citizen awareness of the laws and the exercise of freedom of expression. Overall, the sub-indicator scored 86.4%. The performance of this sub-indicator is justified by the fact that freedom of expression is primarily guaranteed by the Constitution and other laws as well as the existence of various bodies mandated to ensure its application.

Despite the existence of a legal framework conducive for freedom of expression and citizen awareness and actual exercise of their right, citizen perception on the respect of freedom of expression stands at 70.1% and women are slightly more satisfied than men as indicated in the figure below.

Figure 3: Citizen satisfaction with freedom of expression by gender

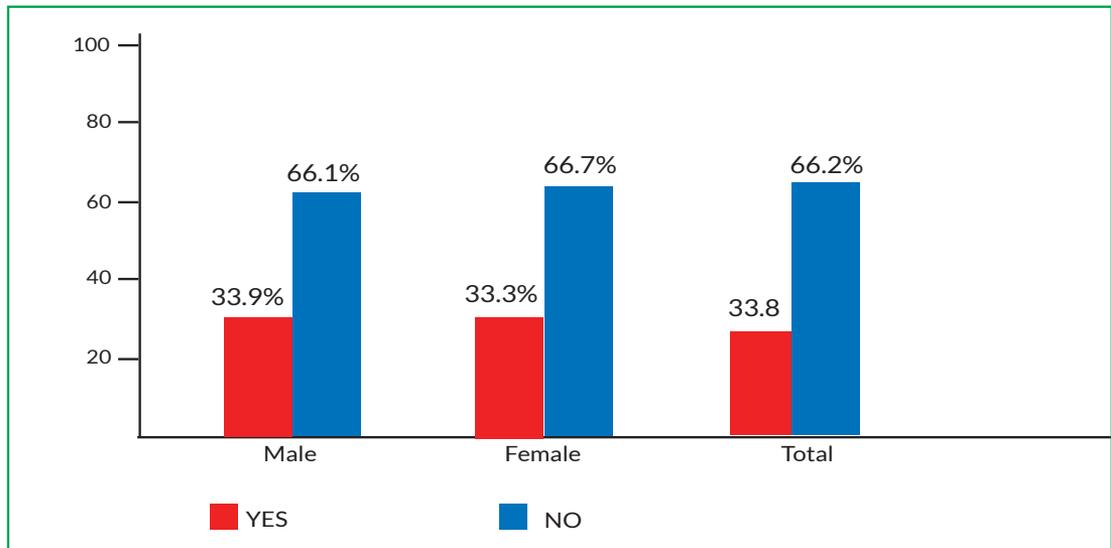


3.2.2. Media freedom

Findings on the sub-indicator of “Media freedom” highlighted the fact that the legal framework in Rwanda largely guarantees media freedom. This is substantiated by the existence of media laws clearly defining media freedom and its limits, bodies guaranteeing the application of media freedom, a legal framework guaranteeing the right to privacy, and the decriminalization of defamation as a media offense. This justifies the score of 93.7% for this sub-indicator.

Nevertheless, the variable of Exercise of media freedom recorded the lowest score (68.7%) under this sub-indicator mainly because 33.8% of media practitioners experienced self-censorship in the past two years. In terms of gender disaggregation, the experience of self-censorship is almost on a par among male and female journalists.

Figure 4: Experience of journalists with self-censorship



3.2.3. Right to Information

The overall score for the sub-indicator of “Right to Information” is 94.7% and it is the highest performing sub-indicator under the indicator of ‘Legal and Policy Framework’. The enactment of the Access to Information Law in 2013 was a game changer, particularly in terms of raising the awareness of the general public on their right to request and access information of public interest from public and private institutions concerned by the law. This definitely influenced the positive perception of citizens, journalists and media CSOs which resulted in the good performance of the variable of Public awareness on the right to information with a score of 84.2%.

3.2.4. Editorial independence

The score for this sub-indicator is 87.0%. The score was informed by both the existence of laws guaranteeing independence in allocating broadcasting time and program, as well as the independence of broadcasters and press to determine their editorial lines. Despite the

good performance of this sub-indicator, the perception on the exercise of independence by broadcasters and press to determine their editorial lines scored 65.5% and is the lowest performing variable of this sub-indicator.

3.2.5. Journalists’ right to protect their sources

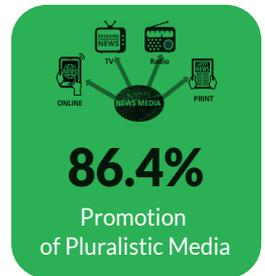
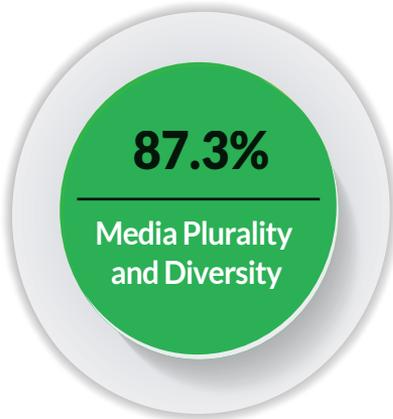
The sub-indicator of “Journalists right to protect their sources” recorded an overall score of 93.3%. This good performance resulted from the fact that the Law regulating media guarantees the right for journalists to protect their sources. There is also a positive perception among journalists that this right is respected in practice.

3.2.6. Recommendations specific to the indicator

- ▶ Conduct public awareness on the legal and policy framework relating to the media;
- ▶ Strengthen the capacity of media practitioners on responsibly exercising media freedom.



Media Plurality and Diversity



3.3. Media Plurality and Diversity

Media plurality and diversity are essential elements for the creation of a favourable ecosystem that allows for public access to media content of their choice and a wide variety of opinions and ideas, which in effect promotes social and political diversity.

This indicator measures how the media landscape accommodates multiple content suppliers, and whether existing policies and laws promote media plurality and diversity. This indicator comprises two sub-indicators: the **Promotion of diversity in the media** and the **Promotion of pluralistic media**. Its overall score is 87.3% as indicated in the table below.

Table 4: Detailed scores for the indicator of Media Plurality and Diversity

| NO | SUB-INDICATOR | SOURCE OF DATA | SCORE |
|---|---|---|--------------|
| 2.1. Promotion of diversity in the Media | | | 88.2% |
| 2.1.1. | Diversity of Media Ownership | Registered Media Houses | 100% |
| 2.1.2. | Absence of Cross-Ownership of Media Outlets | Registered Media Houses | 100% |
| 2.1.3. | Diversity in Editorial Line and Content | Citizens Survey | 82.2% |
| 2.1.4. | Diversity in Frequency and Spectrum Allocation | Regulation Governing Broadcasting Services in Rwanda, Registered Media Houses | 100% |
| 2.1.5. | Language Diversity in Media Content | Citizens Survey | 58.6% |
| 2.2. Promotion of Pluralistic Media | | | 86.4% |
| 2.2.1 | Ease of starting a new Media house | Media Laws 2013, 2009 | 100% |
| 2.2.2 | Equity in Advertisement | Journalists and Media CSOs Survey | 59.2% |
| 2.2.3 | Enabling Regulatory Environment for Community Media | Regulation Governing Broadcasting Services in Rwanda | 100% |
| OVERALL SCORE | | | 87.3% |

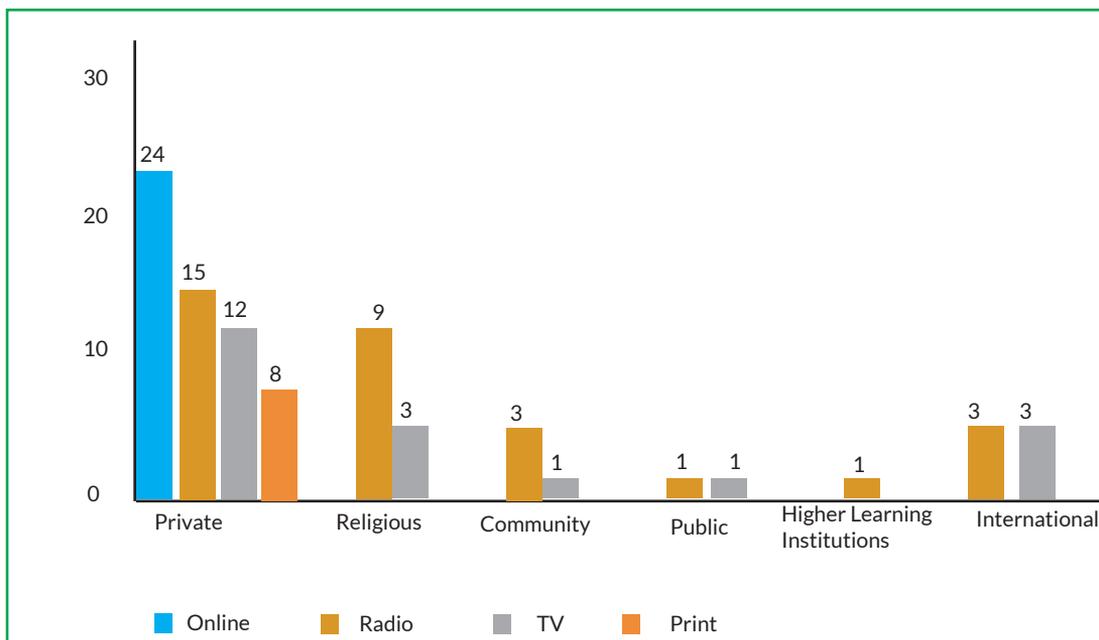
3.3.1. Promotion of Diversity in the Media

The sub-indicator of the “Promotion of diversity in the Media” scored 88.2%. This performance is attributed to the high scores of the variables of “Diversity of Media Ownership” and “Absence of Cross-Ownership” of media outlets. These variables were measured on the basis of data from RURA on licensed media houses. As highlighted in the figure below, the

in practice and promote a diversified media landscape of public, private, international, community, religious, and educational media outlets, as reflected in the figure above.

According to citizen perception, the variable on Diversity in Editorial Line and Content stands at 82.2%. During FGDs, media experts, owners

Figure 5: Media houses ownership



Source: RURA (December, 2020)

media landscape in Rwanda reflects diversity in terms of ownership categories that include commercial, community, public, academic and religious media outlets

Other than the reflected diversity above, there are different owners within the private, religious, community and international media outlets, thus reflecting the absence of cross-ownership.

With regard to diversity in frequency and spectrum allocation, the regulatory framework reflects standards for the management of spectrum allocation as set forth by the International Telecommunications Union (ITU). The standards therein are respected

and managers noted that quality and diversity of content remain a challenge. They pointed out that most of the private radios concentrate on music, sports shows, religious preaching, paid up and direct call-in programs mostly for the youth.

The variable of Language Diversity in Media Content scored 58.6%, the lowest under this sub-indicator. Findings attributed this low perception to the predominant use of Kinyarwanda by local media houses which does not accommodate other non-speakers.

3.3.2. Promotion of Pluralistic Media

The sub-indicator of the “Promotion of Pluralistic Media” scored 86.4%. The variables of Ease of starting a media house and enabling environment for community media and Enabling regulatory environment for community media scored high under this sub-indicator and were measured on the basis of existing legal framework enabling pluralistic media. Particularly, the Law regulating media eased the process of starting a media house as it removed starting capital requirements. Furthermore, community media outlets are exempted from paying VAT and subsidized on licence fee .

The variable of Equity in advertisement had the lowest score under this indicator (59.2%). While the law governing public procurement provides for fair competition in public tenders, there is still negative perception among practitioners on transparency in awarding adverts to media houses.

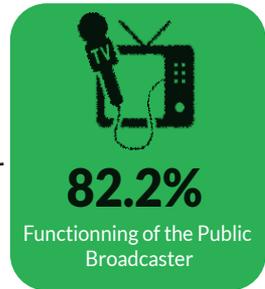
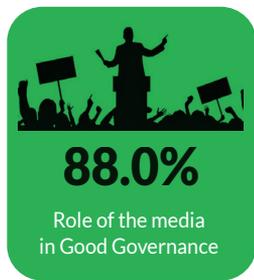
3.3.3. Recommendations specific to the indicator

- ▶ Monitor and enforce compliance with regulations governing broadcasting services in Rwanda especially on the promotion of local content;
- ▶ Encourage media houses to align their business model to the current digital trends.

¹ RURA, (2017). Regulation N0 004/R/MR-MCA/RURA 2017 of 30/06/2017 Governing Broadcasting Services in Rwanda



Media as a Platform for Strengthening Governance and Democracy



3.4. Media as a Platform for Strengthening Governance and Democracy

By rightfully playing its role of educating, informing and entertaining the society, the media participates in the formulation of policies and entrenches constructive practices including gender equality, human rights, unity, participatory and democratic elections and uplift citizens' welfare.

It also serves as a watchdog by identifying and investigating injustice and corruption practices that need addressing for the society to progress. Thus, the indicator of the Media as a Platform for Strengthening Governance and Democracy measures the role of the media in good governance and democracy through its three sub-indicators: *(i) Role of the Media in Good Governance, (ii) The Media as a Platform for Democracy, (iii) Functioning of the Public Broadcaster.*

The overall score of the indicator is 85.0% and all its sub-indicators scored above 80% as indicated in the table below

Table 5: Detailed scores of for Indicator of Media as a Platform for Strengthening Governance and Democracy

| Nº | SUB INDICATOR | SOURCE OF DATA | SCORE |
|---------|---|---|-------|
| 3.1 | Role of the Media in Good Governance | | 88.0% |
| 3.1.1. | Contribution to Policy Formulation | Journalists and Media CSOs Survey | 90.9% |
| 3.1.2. | Educating Citizens on National Policies & Programs | Citizens and Media CSOs survey | 98.9% |
| 3.1.3. | Promotion of Unity | Citizens and Journalists and Media CSOs Survey | 98.7% |
| 3.1.4. | Promotion of Gender | Citizens, Journalists and Media CSOs Survey, List of Accredited Journalists | 72.8% |
| 3.1.5. | Promotion of Anti-Corruption Practices | Citizens, Journalists and Media CSOs Survey | 64.1% |
| 3.1.6. | Contribution to Fighting against Injustice | Citizens, Journalists and Media CSOs Survey | 98.5% |
| 3.1.7. | Promotion of the Respect of Human Rights | Citizens, Journalists and Media CSOs Survey | 95.4% |
| 3.1.8. | Promotion of Social Welfare | Citizens, Journalists and Media CSOs Survey | 97.7% |
| 3.1.9. | Promotion of Proper Use of Ikinyarwanda | Citizens, Journalists and Media CSOs Survey | 87.6% |
| 3.1.10. | Promotion of Rwanda's Cultural Values | Citizens, Journalists and Media CSOs Survey | 87.9% |
| 3.2. | The Media as a Platform for Democracy | | 83.5% |
| 3.2.1. | The Media Reflects Participation of Different Sections of Society | Journalists and Media CSOs Survey | 98.6% |
| 3.2.2. | Public Broadcaster Allocates Equal Space to Political Actors during Elections | Citizens, Journalists and Media CSOs Survey | 68.4% |

| | | | |
|----------------------|---|---|--------------|
| 3.3. | Functioning of the Public Broadcaster | | 82.2% |
| 3.3.1. | Public Broadcaster Mandate Clearly Defined | Law Establishing RBA | 100% |
| 3.3.2. | Public Broadcaster Editorial Independence Exercised | Journalists and Media CSOs survey | 56.4% |
| 3.3.3. | Independence of the Public Broadcaster Oversight Body Guaranteed by Law | Law Establishing RBA | 100% |
| 3.3.4. | Public Broadcaster Programs Serve the Interests of Citizens | Citizens, Journalists and Media CSOs Survey | 72.4% |
| OVERALL SCORE | | | 85.0% |

3.4.1. Role of the Media in Good Governance

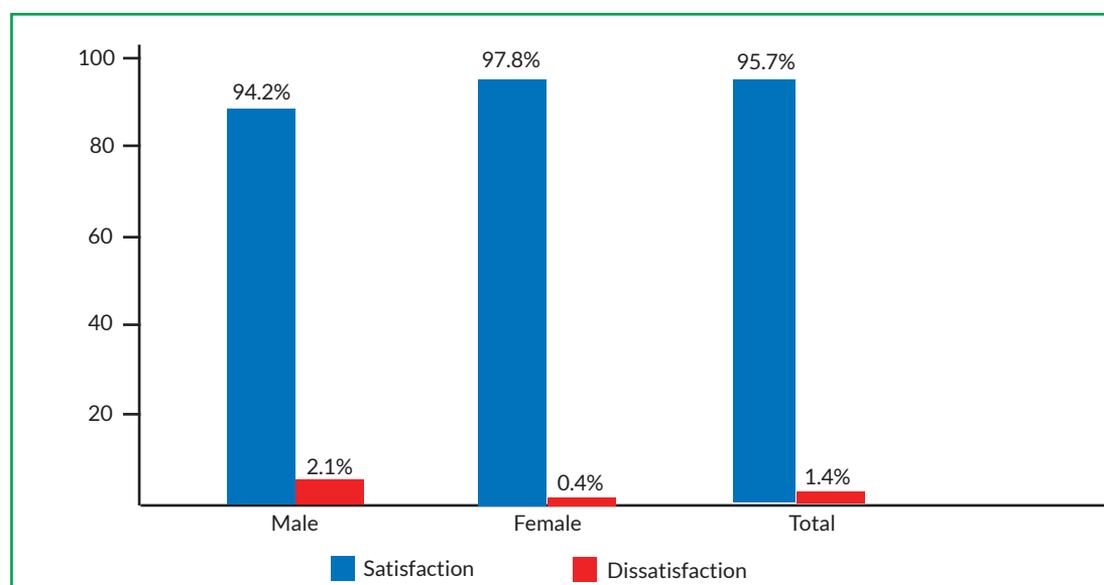
The “*Role of the Media in Good Governance*” sub-indicator comprises ten variables measuring the contribution of the media in various areas of good governance. The sub-indicator scored 88.0% and out of its ten variables, eight scored above 85.0% while the remaining two scored between 64% and 72%.

Under this sub-indicator, the variable of the Media educates citizens on national policies and programs had the highest score (98.9%). In contrast, the variable of Media and anti-corruption practices had the lowest score (64.1%) justified by the perception of journalists

that they take bribes. This could constitute a hindrance to the fulfilment of the role of watchdog as it would be hard for journalists to objectively investigate and report cases of corruption if they are also corrupt.

The variable of Promotion of gender scored 72.8%. While the low percentage of accredited female journalists (24.26%) affected the total score of the variable, citizen perception on the role of media programs in the promotion of gender equality scored 95.7% as highlighted in the figure below.

Figure 6: Citizens satisfaction with the role of media in promoting gender



3.4.2. The Media as a Platform for Democracy

The sub-indicator captures perceptions of Journalists and media CSOs as well as citizens about the role played by the media in promoting democracy.

This sub-indicator scored 83.5% from its two variables: the Media reflects participation of different sections of society, and the Public Broadcaster allocates equal space to political actors during elections that scored 98.6% and 68.4% respectively.

interests. It is mandated to provide the Rwandan population and other members of its audience with national and international news that is accurate and not biased, educational programs and act as a catalyst for national development.²

The score of this sub-indicator is 82.2%. Its variables related to the existence of the legal guarantee of the Public Broadcaster's mandate and independence of its Board had the highest scores. Conversely, the exercise of the Public Broadcaster's editorial independence had the lowest score (56.4%), resulting from the perception of journalists and media CSOs.

3.4.3. Functioning of the Public Broadcaster

This sub-indicator is composed of 4 variables assessing the performance of the Public Broadcaster as it is expected to serve public

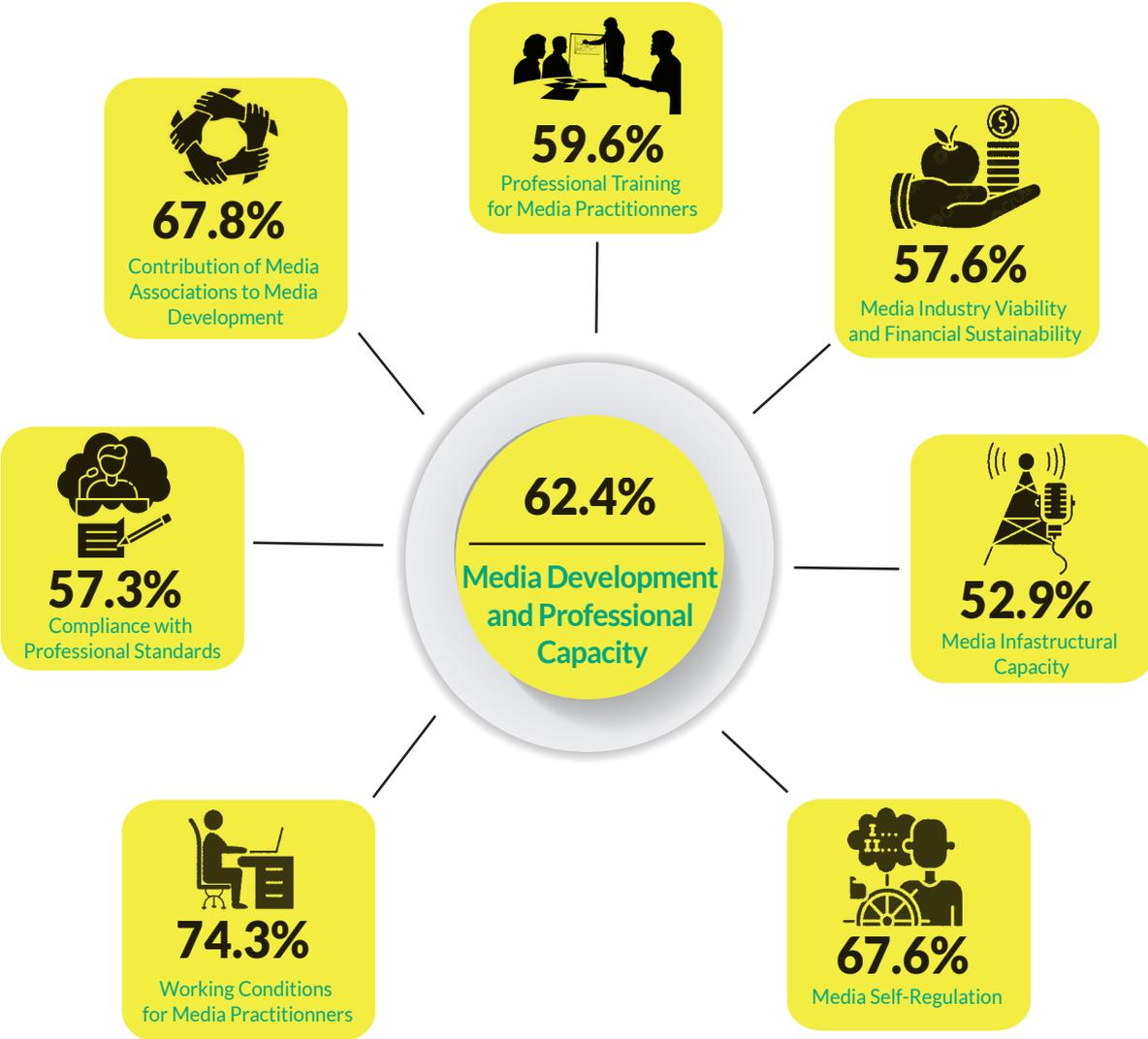
3.4.4. Recommendations specific to the indicator

- ▶ Fight corruption in the media by strengthening editorial processes and sensitizing the public on unprofessional practices exposing media to corruption;
- ▶ Encourage and incentivize women to join the media sector;
- ▶ Promote awareness on the law establishing Rwanda Broadcasting Agency and determining its functioning;
- ▶ The Public Broadcaster should enhance citizen outreach programs; Encourage media houses to align their business model to the current digital trends.

² Law N°42/2013 Of 16/06/2013 establishing Rwanda Broadcasting Agency and determining its mission, organization and functioning



Media Development and Professional Capacity



3.5. Media Development and Professional Capacity

This indicator assesses whether the media in Rwanda has adequate financial, human and infrastructure resources to effectively execute its cardinal function of informing, educating and entertaining. The overall score of this indicator is 62.4% from its seven sub-indicators as indicated in the table below.

Table 6: Detailed scores for the indicator of the Media Development and Professional Capacity

| N° | SUB INDICATOR | SOURCE OF DATA | SCORE |
|---|--|--|--------------|
| 4.1. Professional Training for Media Practitioners | | | 59.6% |
| 4.1.1. | Access to Professional Trainings | Journalists and Media CSOs Survey, MHC Reports | 67.8% |
| 4.1.2. | Trainings Appropriateness to Needs | Journalists and Media CSOs Survey | 60.5% |
| 4.1.3. | Training Program in Specialized Reporting Skills | Journalists and Media CSOs Survey | 61.5% |
| 4.1.4. | Perception of Journalists on Qualification Requirements to Practice Journalism | Journalists and Media CSOs Survey | 48.6% |
| 4.2. Contribution of Media Associations to Media Development | | | 67.8% |
| 4.2.1. | Media Associations Contribute to Professional Development of Journalists | Journalists and Media CSOs Survey | 70.3% |
| 4.2.2. | Media Associations Contribute to the Development of the Media Sector | Journalists and Media CSOs Survey | 74.9% |
| 4.2.3. | Media Associations Contribute To The Welfare Of Their Members | Journalists and Media CSOs Survey | 58.1% |
| 4.3. Compliance with Professional Standards | | | 57.3% |
| 4.3.1. | Awareness of the Professional Code of Ethics by Media Practitioners | Journalists and Media CSOs Survey | 96.6% |
| 4.3.2. | Respect of the Media Professional Code of Ethics | Journalists and Media CSOs Survey | 55.6% |
| 4.3.3. | Accountability and Responsible Journalism | Journalists and Media CSOs Survey | 19.6% |
| 4.4. Working Conditions for Media Practitioners | | | 74.3% |
| 4.4.1. | Employment Terms Clearly Defined And Respected | Journalists and Media CSOs Survey | 64.3% |
| 4.4.2. | Safety of Journalists | Journalists and Media CSOs Survey | 84.4% |
| 4.5. Media Self-Regulation | | | 67.6% |
| 4.5.1. | Promotion of Ethical Conduct through Handling of Media Related Complaints | Media Self-Regulatory Report | 97.5% |
| 4.5.2. | Independence of the Media Self-Regulatory Body | Journalists and Media CSOs Survey | 37.6% |
| 4.6. Media Infrastructural Capacity | | | 52.9% |
| 4.6.1. | Access to and Use of ICTs | Media Self-Regulatory Report | 72.4% |
| 4.6.2. | Technical Equipment Facilitates Inclusiveness of Persons with Disabilities | Journalists and Media CSOs Survey | 33.3% |

| | | | |
|---|--------------------------------------|-----------------------------------|--------------|
| 4.7. Media Industry Viability and Financial Sustainability | | | 57.6% |
| 4.7.1. | Media Profitability | Journalists and Media CSOs Survey | 21.3% |
| 4.7.2. | Impact of ICT on Media Profitability | Journalists and Media CSOs Survey | 93.9% |
| OVERALL SCORE | | | 62.4% |

Media Development and Professional Capacity is the lowest performing indicator of this barometer and all its seven sub-indicators scored below 75.0%. The sub-indicator of “Working condition for media practitioners” recorded the highest score (74.3%) while the sub-indicator of “Media infrastructural capacity” has the lowest score (52.9%).

3.5.1. Professional Training for Media Practitioners

The sub-indicator of “Professional Training for media practitioners” stands at 59.6%. The low performance of this sub-indicator is a result of the perception of journalists that trainings offered are more theoretical than practical and inappropriate to emerging market demands and trends in the media profession. Additionally, media practitioners expressed dissatisfaction with qualification requirements to practice journalism.

3.5.2. Contribution of Media Associations to Media Development

This sub-indicator scored 67.8% from its three variables, namely; the Contribution of media associations to the development of the media sector (74.9%); Contribution of media associations to professional development of journalists (70.3%) and the Contribution of media associations to the welfare of their members (58.1%). The main challenges that led to the poor performance of this sub-indicator are inherently weak associations with ineffective programs and limited sense of ownership among its members.

3.5.3. Compliance with Professional Standards

With a score of 57.3%, the sub-indicator of “Compliance with Professional Standards” registered one of the poorest performances of the RMB 2021. Three variables that were measured under this sub-indicator are Awareness of the Professional Code of Ethics by Media Practitioners (96.6%), Respect of the Media Professional Code of Ethics (55.6%) and Accountability and Responsible Journalism which got the lowest score (19,6%) in this barometer.

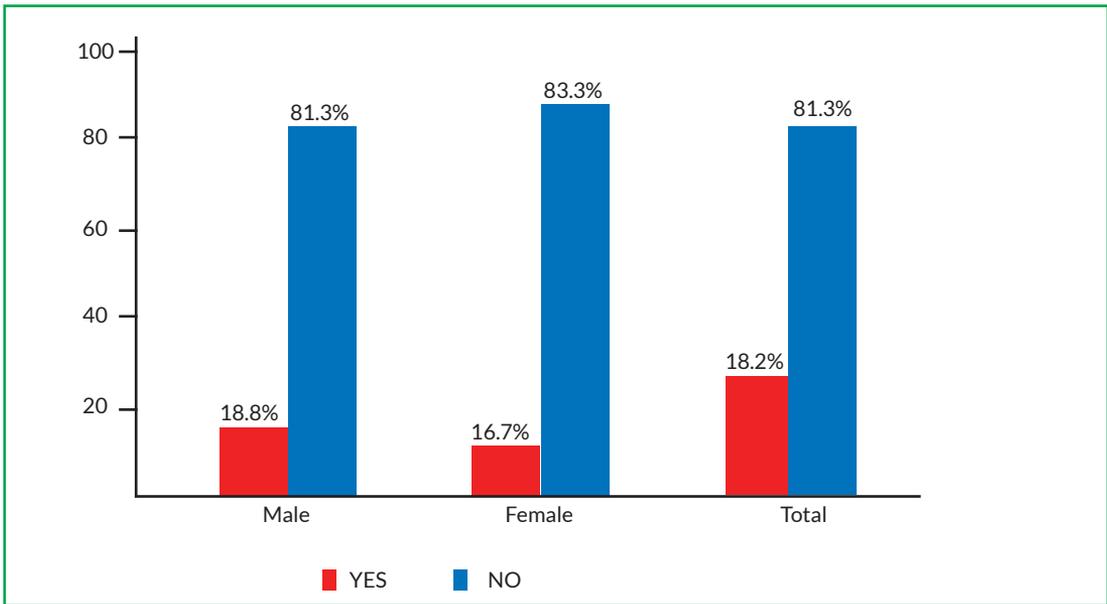
Based on the above findings, it is evident that journalists are aware of the professional code of ethics but fail to abide by it. With regard to responsible journalism, findings pointed to limited cautiousness amongst media professionals on the impact of their content on the society and low level of compliance with proactive rectification of erroneous content.

Media experts highlighted the escalating violation of the media professional code of ethics and failure of media houses and the self-regulatory body to hold offenders accountable.

3.5.4. Working Conditions for Media Practitioners

The sub-indicator of “Working Conditions for Media Practitioners”, through the lens of journalists and media practitioners, scored 74.3% from its two variables. The variable of Safety of Journalists registered the highest score (84.4%) and it assessed the working environment for journalists, safety from harassment, profession related imprisonment and killings.

Figure 7: Journalists' experience with work related insecurity

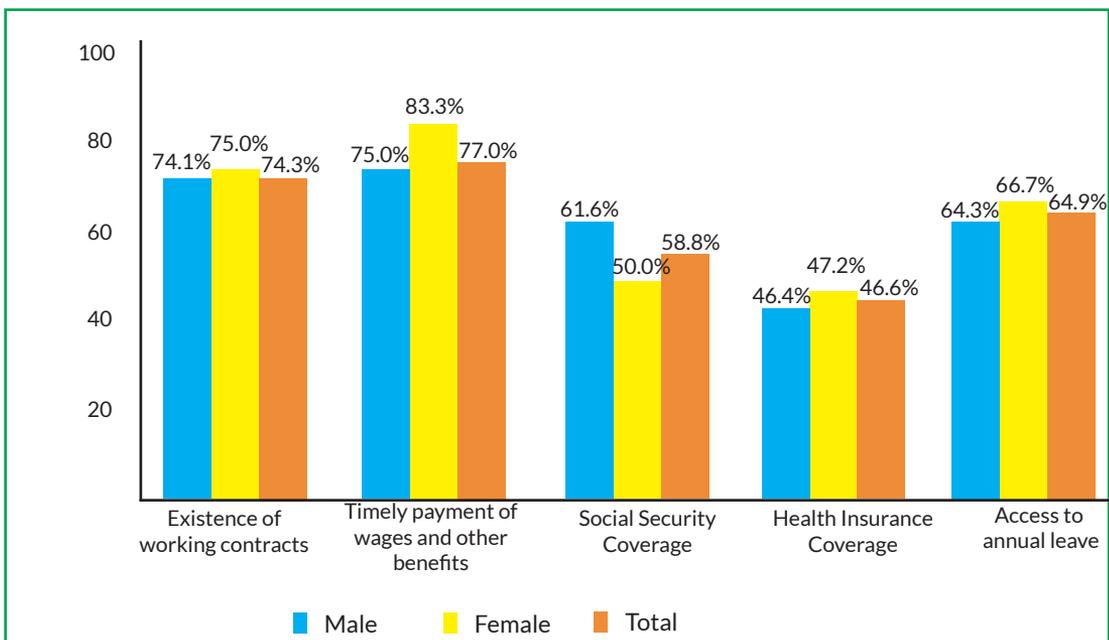


In general, both male and female journalists confirmed that they feel safe and secure in the exercise of their profession at a rate of more than 80%.

The variable of Respect and Clarity of Employment Terms scored 64.3%. It gauged

aspects of existence of working contracts, timely payment of wages and other benefits, social security coverage, health insurance coverage and access to annual leave. The main hindrances identified in relation to journalists' employment are inadequate social and health insurance coverage.

Figure 8: Experience of journalists with respect of employment terms



Over 75% of interviewed journalists attested to timely payment of wages and other benefits while a lower percentage confirmed having health insurance and social security coverage. Lack of social security coverage was most highlighted by female journalists.

3.5.5. Media Self-Regulation

The sub-indicator of “Media Self-Regulation” scored 67.6%. Of the two variables that were measured under this sub-indicator, Promotion of ethical conduct through handling of media related complaints scored 97.5%. On the other hand, the Independence of the Media Self-Regulatory body scored very low at 37.6%. This low score was occasioned by the perception of journalists and media CSOs that the self-regulatory body lacks financial independence.

3.5.6. Media Infrastructural Capacity

The sub-indicator of “Media Infrastructural Capacity” stands at 52.9%. With a score of 72.4%, Access to and Use of ICT is the highest performing variable of this sub-indicator, while the variable of Inclusive Facilities for People with Disabilities (PWDs) got the lowest score of 33.3%. The above findings indicate that availability of ICT tools and infrastructure

boosted the operations of the media, yet, there are still gaps in facilities that help PWDs to consume media content.

3.5.7. Media Industry Viability and Financial Sustainability

The overall score for the “Media Industry Viability and Financial Sustainability” sub-indicator stands at 57.6%. The variable of Media Profitability got the lowest score (21.3%). This score is a result of the perception by media practitioners and media CSOs on the low capacity of media houses to pay employees’ salaries, procure equipment, own or rent office space and rent masts.

Despite the situation described above, the score of 93.9% registered by the Impact of ICT on media profitability variable indicates the gradual role played by ICT in revenue generation.

3.5.8. Recommendations Specific to the Pillar

- ▶ Strengthen the capacity of media associations to contribute to the welfare of their members;
- ▶ Sensitize media houses to put in place facilities that enable people with disabilities to consume media content;
- ▶ Raise awareness of media practitioners on their rights and obligations as stipulated by the labour law;
- ▶ Enhance the functioning of the media development fund to improve media business and journalists’ welfare.



Access to Information



00-24.9



25-49.9



50-74.9



75-100



3.6. Access to information

Access to information is critical for enabling citizens to exercise their voice, effectively monitor and hold government to account, and to enter into informed dialogue about decisions which affect their lives³. Effective media consumption is contingent on closeness of information and consumers' capacity to pay for media platforms through which they access information. Therefore, this indicator examines availability of the media and citizens' ability to access information.

The indicator recorded a score of 77.8% from its two sub-indicators as shown in the table below.

Table 7: Detailed scores for the indicator of Access to information

| Nº | SUB-INDICATOR | SOURCE OF DATA | SCORE |
|---|--|--|--------------|
| 5.1. Media Coverage | | | 73.1% |
| 5.1.1. | Availability of Media Content Distribution Facilities | RURA and MINICT reports | 91.6% |
| 5.1.2. | Citizen Satisfaction with Access to Sources of Information by Citizens | Citizens Survey | 54.6% |
| 5.2. Status of Access to Information | | | 82.5% |
| 5.2.1. | Regulatory Framework Guaranteeing Access to Information | Access to Information Law | 100% |
| 5.2.2. | Awareness on Access to Information Law by Journalists and media CS Os | Journalists and Media CSOs Survey | 92.5% |
| 5.2.3. | Public Satisfaction with Access to Information | Citizens and Journalists and Media CSOs Survey | 55.0% |
| OVERALL SCORE | | | 77.8% |

3.6.1. Media Coverage

This sub-indicator of “Media Coverage” encompasses two variables that assessed Radio and TV signal coverage, internet penetration as well as the status of access to various sources of information by citizens.

The variable of Availability of media content distribution facilities scored 91.5%. This performance is attributed to the fact that Radio and Television signals cover 98% and 80% of the Rwandan territory respectively as per the RURA report (2020)⁴. Another aspect that contributed to this sub-indicator's high performance is 4G internet penetration that as of 2018 was covering 96.7% of geographic coverage and 96.6% of population coverage.⁵

The high rate of internet penetration resulted into quick access to information circulated by online publications and other internet-based sources of information.

Despite the wide Radio and TV signal coverage and great internet penetration, citizens' satisfaction with access to media sources of information is low (54.6%). This is due to weak Radio/TV signals and low internet speed in some parts of the country among other factors.

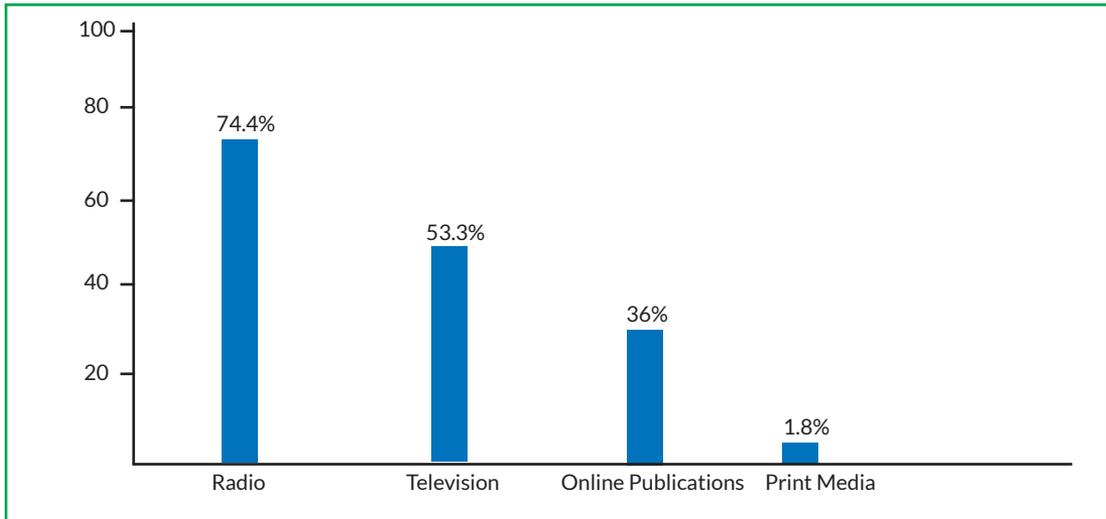
The graph below shows the level of citizen satisfaction with access various media sources of information:

³ Haider, H., McLoughlin, C., Scott Z., (2011). Topic Guide on Communication and Governance. Retrieved from: [http:// www.gsdr.org/wp-content/uploads/2010/04/CommGAP2.pdf](http://www.gsdr.org/wp-content/uploads/2010/04/CommGAP2.pdf) accessed on 11th January 2021.

⁴ RURA, (2020). FM Stations Operating in Rwanda and their Approximate Coverage

⁵ MICT, (2018). ICT Sector Profile

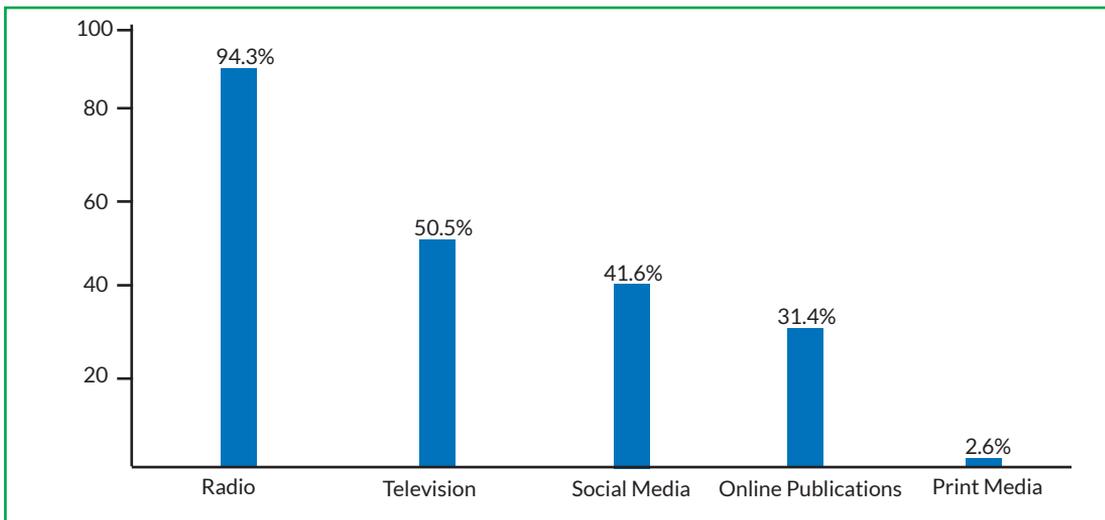
Figure 9: Citizen satisfaction with access to media sources of information



Citizens are more satisfied with access to radio (74.4%) than other media channels. On the other hand, access to print media is the least appreciated by the citizens (1.8%). The factor behind this low satisfaction is the result of ICT revolution that sparked a shift of consumers

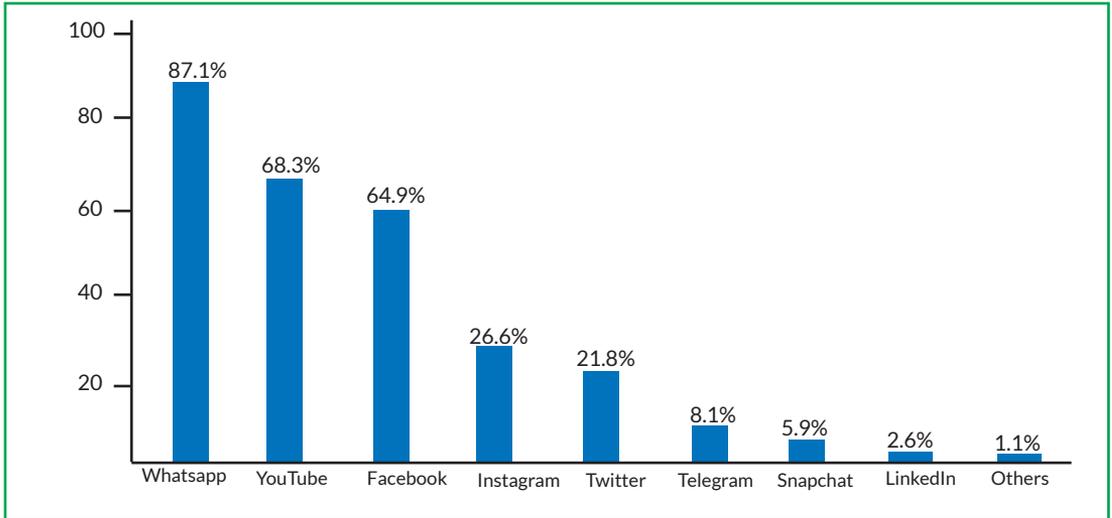
from print media to online publications and social media that are convenient and cheaper. Radio also emerged the most preferred media source of information for citizens as indicated in the graph below:

Figure 10: Citizens preference with media sources of information



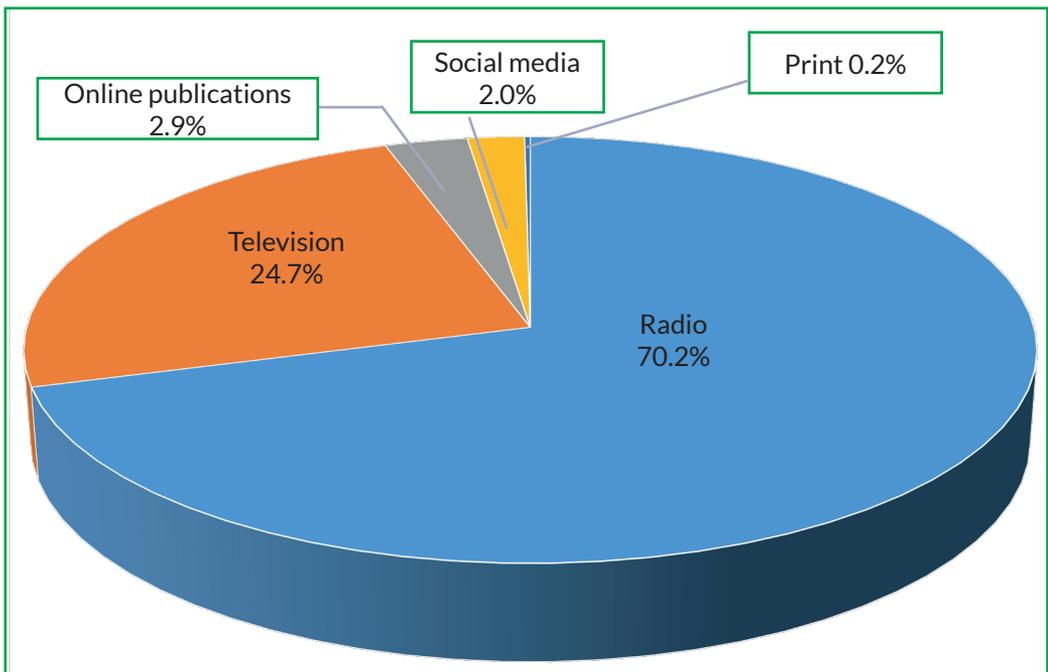
Alongside traditional media, today social media constitute an important source of information for citizens as a result of internet penetration and its gradual affordability.

Figure 11: Use of social media by citizens



WhatsApp leads other social media platforms used by citizens, followed by YouTube and Facebook

Figure 12: Level of citizen trust in media sources of information



Radio is the most trusted source of information by citizens while their trust in online publication, social media and print remains very low

3.6.2. Status of Access to Information

The sub-indicator of “Status of access to information” scored 82.5%. Under this sub-indicator, three variables were measured: (i) Regulatory framework guaranteeing access to information, (ii) Awareness on the access to information Law by Journalists and media CSOs, and (iii) Public satisfaction with access to information. The performance of this sub-indicator is explained by the existence of the Law relating to Access to information and high level of awareness on this law by journalists and civil society.

Despite the existence and public awareness of the law relating to access to information, the Public satisfaction with access to information is low (55%). According to media experts, this score reflects the reality on the ground where some custodians of information are reluctant to provide information to citizens and journalists.

3.6.3. Recommendations specific to the pillar

- Increase public awareness on the Access to Information Law.

4. CONCLUSION AND RECOMMENDATIONS

4.1. Conclusion

The Rwanda Media Barometer 2021 shows the status of media development in Rwanda in various aspects related to regulatory environment, professional capacity and welfare of media practitioners, media financial capacity, the role of media in promoting good governance and democracy as well as access to information.

Findings of this barometer pointed out areas that performed well and highlighted challenges that need to be addressed for the media to continuously play its role in the society. Therefore, in addition to indicator specific recommendations this study proposes the following policy recommendations to different stakeholders.

Table 8: RMB 2021 Policy recommendations

| RECOMMENDATIONS | INSTITUTIONS |
|--|----------------------------------|
| Review the requirements for exercising journalism profession | MINALOC, RGB, RMC, |
| Sensitize media owners and managers to comply with the labour law | RGB, Media Houses & Associations |
| Improve financial and human resource management within media houses | RGB, Media Houses & Associations |
| Strengthen media-self regulation to effectively enforce the code of ethics and conduct for journalists | MINALOC, RGB, RMC |
| Support initiatives aimed at attracting investments in the media industry. | MINALOC, RDB, RGB, |
| Increase public awareness on the Access to Information Law | RGB |
| Improve radio/television signal coverage and the quality of internet networks in some parts of the country | MINICT, RURA, RBA |
| Raise public awareness on digital media literacy | MINICT, RURA |
| Media capacity building programs should be tailored to the needs of media professionals and the changing media sector dynamics | RGB, Schools of Journalism |

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