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Rwanda

Media Barometer 2024

THE STATE OF MEDIA DEVELOPMENT IN RWANDA

Rwanda Media Barometer

THE STATE OF MEDIA
DEVELOPMENT IN RWANDA

2024

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2024

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LIST OF ACRONYMS

ARJ	Rwanda Journalists Association
FGD	Focus Group Discussion
GoR	Government of Rwanda
ICT	Information Communication Technology
KII	Key Informant Interview
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
RURA	Rwanda Utilities Regulatory Authority
UNESCO	United Nations Educational, Scientific and Cultural Organization



FOREWORD

I am pleased to present to you the Rwanda Media Barometer 2024, a report that assesses the state of the media sector in Rwanda. This year's barometer is the culmination of research and analysis, which has yielded valuable insights into the strengths and challenges facing our media landscape.

This edition of the barometer highlights five key indicators: (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 (v) Information transmission and access. These indicators provide a comprehensive picture of the current state of our media sector, highlighting both progress and challenges.

The RMB 2024 overall score is 76.7% a slight decline from the RMB 2021 score of 80.6%. This decline in score is not unexpected, as our barometer has undergone a significant restructuring to better capture the current realities of the media sector. We have shifted our focus from simple existence of laws to their actual application to check whether the regulatory framework is making impact as per the views of their intended beneficiaries.

In the RMB 2024, two out of five indicators scored above 80% while the remaining three scored between 60% and 79%. The highest performing indicator is Legal and policy framework with a score of 90.0% and the lowest performing indicator is Media development and professional capacity with a score of 60.7%.

The Rwanda Media Barometer is more than just a report card; it is a tool for informing interventions that can help develop and strengthen our media sector. It is a reminder to policymakers, regulators, and media practitioners to keep working together to address the challenges and capitalize on the opportunities presented by our rapidly evolving media landscape.

I would like to express my gratitude to the team of researchers who have worked tirelessly to gather data and analyse the findings. Their dedication has ensured that this report is a valuable resource for all stakeholders in the media sector.

I hope that this report will serve as a catalyst for positive change in our media sector, and I look forward to seeing the progress that we will make in the years to come.

Dr. Doris Uwicyeza Picard
Chief Executive Officer

Table 1: Summary of Rwanda Media Barometer 2024

N°	Sub-indicators	Variables	Score
Indicator I: Legal and policy framework			90.0%
1.1	Legal environment		100.0%
1.1.1		Existence of legal protection of rights and freedoms	100.0%
1.1.2		Decriminalization of defamation in media	100.0%
1.1.3		Access to information is guaranteed by the law	100.0%
1.2	Awareness and exercise of the freedom of expression		87.4%
1.2.1		Awareness of freedom of expression	96.5%
1.2.2		Exercise of freedom of expression	82.1%
1.2.3		Satisfaction with the respect of the freedom of expression	83.6%
1.3.	Respect and exercise of the media freedom		82.7%
1.3.1		The exercise of the media freedom	74.1%
1.3.2		Satisfaction with the respect of the media freedom	89.7%
1.3.3		Editorial and journalists' independence	84.4%
Indicator II: Media plurality and diversity			72.3%
2.1	Media plurality		80.6%
2.1.1.		Existence of different and diverse types of media outlets	100.0%
2.1.2		Existence of multiplicity in ownership of media outlets	100.0%
2.1.3		Geographical distribution in media	86.7%
2.1.4		Women representation in media	35.6%
2.2	Diversity in the Media content		64.0%
2.2.1		Diversity in editorial line and content	84.3%
2.2.2		Language diversity and inclusiveness in media content	43.7%
Indicator III: Media as a platform for strengthening governance and democracy			81.3%
3.1.	Media as a platform for good governance		82.7%
3.1.1		Role of the media in educating citizens on national policies and programs	95.1%
3.1.2		Role of the media in promoting unity and resilience among Rwandans	93.9%

3.1.3		Role of the media in promoting gender equality	87.1%
3.1.4		Role of the media in fighting corruption	83.1%
3.1.5		Role of the media in fighting injustice	89.4%
3.1.6		Role of the media in promoting human rights	85.5%
3.1.7		Role of the media in promoting the proper use of Kinyarwanda language	60.6%
3.1.8		Role of the media in promoting Rwanda's cultural values	66.6%
3.2	The media as a platform for democracy		92.5%
3.2.1		The media reflects in promoting participation of different sections of society	85.0%
3.2.2		Allocation of equal space by the Public Broadcaster to political actors during elections	100.0%
3.3	Functioning of the Public Broadcaster		68.6%
3.3.1		Public Broadcaster editorial independence exercised	54.5%
3.3.2		Public Broadcaster programs reflect the interests of citizens	82.7%
Indicator IV: Media Development and professional capacity			60.7%
4.1	Professional training for media practitioners		71.5%
4.1.1		Percentage of journalists trained in the last two years	67.1%
4.1.2		Percentage of journalists who confirmed the relevance of the received training	92.4%
4.1.3		Percentage of journalists trained in specialized reporting	66.1%
4.1.4		Percentage of journalists who believe that qualification in media studies should be a requirement to practice journalism	60.4%
4.2	The contribution of media associations to media development		51.0%
4.2.1.		Journalists' satisfaction with the contribution of media associations to their professional development	60.8%
4.2.2.		Journalists' satisfaction with the contribution of media associations to their welfare	41.2%
4.3.	Working conditions for media practitioners		69.9%
4.3.1.		Employment terms clearly defined and respected	59.9%
4.3.2.		Safety of journalists	80.7%
4.3.3		Journalists' satisfaction with equipment to facilitate collection and dissemination of content	69.0%

4.4	Media self-regulation		55.8%
4.4.1		Journalists' satisfaction with effectiveness of the media self-regulatory body	59.9%
4.4.2		Compliance with professional standards	51.7%
4.5	Media houses financial sustainability		55.5%
4.5.1		Effectiveness of media houses management	59.0%
4.5.2		Media houses financial viability	52.1%
Indicator V: Information transmission and access			79.1%
5.1	Infrastructure for media coverage		76.7%
5.1.1		Radio signal coverage	99.0%
5.1.2		TV signal coverage	80.0%
5.1.3		Mobile cellular-telephone subscriptions per 100 inhabitants	96.3%
5.1.4		Internet subscriptions per 100 inhabitants	68.9%
5.1.5		Citizens' satisfaction with access to Radio	87.2%
5.1.6		Citizens' satisfaction with access to Television	62.0%
5.1.7		Citizens' satisfaction with access to online outlets	43.2%
5.2.	Status of access to information		81.5%
5.2.1		Awareness of the right to information	90.8%
5.2.2		Public satisfaction with access to information	72.2%
RMB 2024 OVERALL SCORE			76.7%



EXECUTIVE SUMMARY

Rwanda Media Barometer (RMB) 2024 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) Information transmission and access. These indicators are composed of 15 sub-indicators and 49 variables.

In the current barometer, some indicators, sub-indicators and variables were restructured and renamed to better capture both primary and secondary data in line with the current realities in the media sector. In comparison with RMB 2021, the number of sub-indicators changed from 19 to 15 while variables reduced from 66 to 49. For the first time since the inception of the RMB in 2013, composites were introduced at the lowest level of measurement, to capture key aspects of the media sector development that were not considered in previous editions and also ease understanding of the findings.

The overall score of the Rwanda Media Barometer 2024 is 76.7%. The indicator of Legal and policy framework recorded the highest performance with a score of 90.0%, followed by Media as a platform for strengthening governance and democracy with 81.3%, Information transmission and access with 79.1%, Media plurality and diversity 72.3%. The lowest performing indicator in this edition is Media development and professional capacity that scored 60.7%.

The RMB 2024 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, journalists' working conditions in terms of salaries, health and insurance coverage, professionalism and accountability among media practitioners. Other identified gaps include low women representation in the media sector, inappropriate use of the Kinyarwanda language and promotion of the Rwandan culture and values, lack of mechanisms to help persons with disabilities follow TV programs as well as inefficiencies in the functioning of media associations and the media self-regulatory body.

1



INTRODUCTION

Rwanda Media Barometer (RMB) is a biennial publication of the Rwanda Governance Board that assesses the state of media development in Rwanda since 2013. The production of Rwanda Media Barometer falls under one of RGB mandates of promoting the media sector and providing advice on its operations.

The RMB provides information on whether existing laws, policies and infrastructures are updated enough to help the media 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 telecast 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.

The RMB findings provide contextual and institutional conditions and evidence-based information about media development in Rwanda. Therefore, it informs policy makers, media professionals, media regulators, private sector operators, development partners and civil society organizations about areas within the media system where improvement is required.

The RMB 2024 is the 5th edition which coincides with a series of changes in media landscape resulting from continuous improvement in business environment and an ever-increasing use and access to internet and other ICT tools. As a result, mainstream media is facing a stiff competition from online publications whereby print media was hit the most as newspapers are almost disappearing on the market.

Consumers of media content are exposed to a multitude of information some of which come from unreliable sources or are intended to deceive, thus fact-checking turned out to be a necessary ingredient in media business.

As of December 2023, there were 39 radio stations and 24 TV stations operating in Rwanda (RURA 2023), five (5) print media houses and 169 licenced online media houses (RMC 2024).

2



OBJECTIVES OF RMB 2024

The Rwanda Media Barometer 2024 measures the state of media development in Rwanda. Specifically, the study is intended to:

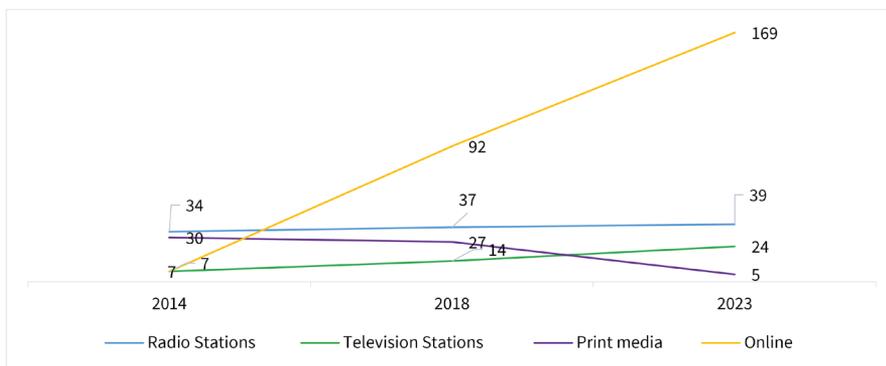
- i. Measure the level of the exercise and public satisfaction with freedom of expression, press freedom and access to information with regard to national laws, policy and international instruments ratified by Rwanda;
- ii. Discern the status of media plurality and diversity in terms of multiplicity in ownership of media outlets, geographical distribution of media outlets, women representation in media as well as diversity in content and language;
- iii. Assess the role of media in promoting good governance and democratic principles;
- iv. Assess whether the media sector is well equipped in terms of needed financial and human resources as well 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;
- vii. Assess the availability and accessibility of Media which citizens use to get information;
- viii. Make recommendations which will guide interventions meant to improve media sector development in the country.

3 RWANDA MEDIA LANDSCAPE

3.1. Media growth

The media reforms undertaken by Rwanda in 2013, through the enactment of a number of laws easing investment in the media sector which led to a diverse and pluralistic media landscape. According to RURA¹, as of December 2023, there were 39 radio stations, 24 TV stations and five (5) print media outlets. The data from RMC² indicates that there were 169 online media houses.

Figure 1: Growth of media houses in two decades (2002-2023)



Source: RURA 2023 and RMC 2024

The figure above shows the trend of four media categories namely radio, television, online, and print media from 2014 to 2023. The online media shows rapid growth resulting from a number of factors that include: increased internet penetration, smartphone usage and shift from analogue to digital systems. Print media is almost non-existent as some of the print organizations migrated to online publication while those that could not adapt to the changes closed their businesses.

1. RURA 2023, List of registered media houses
 2. RMC 2024, List of registered media houses RMC 2024

3.2. Journalists' capacity building

During the commencement of media reforms in 2013, there were two higher learning institutions offering journalism and communication programs. Currently, there are four higher learning institutions, namely the School of Journalism and Communication at the University of Rwanda, the Faculty of Journalism and Communication studies at the Catholic Institute of Kabgayi, Department of Mass Media and Communication at Mount Kigali University and the School of Mass Media and Communication at the East African University-Rwanda.

As of December 2023, the Media Self-regulatory body reported 409 accredited journalists with valid press cards of whom 109 (26.6%) are female journalists and 300 (73.4%) are male journalists.

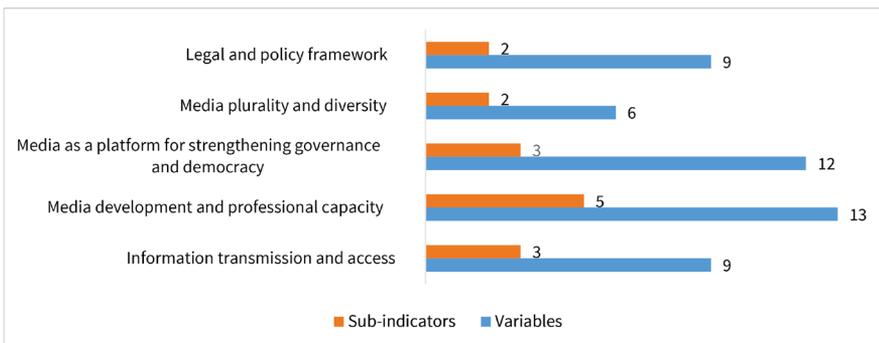
4 RESEARCH METHODOLOGY

The production of RMB 2024 used both primary data collection and desk research. Primary data collection involved both quantitative and qualitative approaches, using questionnaire, key informant interviews (KIIs) and focus group discussions (FGDs). Desk research involved analysis of administrative data and review of documents from various institutions in relation to the media sector.

4.1. Indicator framework

In the current barometer, some indicators, sub-indicators and variables were restructured and renamed to better capture both primary and secondary data in line with the current media context. Correspondingly, the RMB 2024 comprises 5 indicators, 15 sub-indicators and 49 variables. In comparison with RMB 2021, the number of sub-indicators changed from 19 to 15 while variables reduced from 66 to 49. The following figure indicates the number of sub-indicators and variables per indicator of the RMB 2024.

Figure 2: Number of sub-indicators and variables per indicator



4.2. Primary data collection

4.2.1. Quantitative data collection

Quantitative data were collected using structured questionnaires that were administered to the target respondents sampled from citizens and journalists.

Sampling method

The population for the RMB 2024 comprised of citizens and journalists for the quantitative survey.

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 randomly considering those aged 18 and above.

The population of journalists was drawn from the list of accredited journalists and 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 409 with equal likelihood of being selected. The strata were formulated on the basis of type of media outlet that each journalist was affiliated to. Based on the above information, the overall sample size was provided by the formula below:

$$x = Z(c/100)2r(100-r)$$

$$n = N x / ((N-1) E^2 + x)$$

$$E = \text{Sqrt} [(N - n) x / n (N-1)]$$

Where:

N is the population size

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

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

RMB 2024 involved respondents from 10 sampled districts selected from all four provinces and the City of Kigali. The ten districts are Gasabo and Nyarugenge in the City of Kigali; Muhanga and Gisagara in the Southern Province, Karongi and Rutsiro in the Western Province, Gicumbi and Musanze in the Northern Province as well as Ngoma and Rwamagana in the Eastern Province. The sample size for citizens was 664 distributed in the ten districts as shown in the table below:

Table 2: Sample size and distribution for the category of citizens

Province	District	Population Proportion	Sample size
City of Kigali	Gasabo	0.204	136
	Nyarugenge	0.091	60
South	Muhanga	0.081	54
	Gisagara	0.080	53
West	Karongi	0.078	52
	Rutsiro	0.076	51
East	Ngoma	0.083	55
	Rwamagana	0.105	70
North	Gicumbi	0.097	65
	Musanze	0.104	69
Total sample			664

The sample size and distribution for the category of journalists is provided in the table below:

Table 3: Sample size and distribution for journalists

Category	Population size	Population	Sample size
Radio	131	0.32	81
Freelancers	110	0.27	68
Online	75	0.18	47
TV	56	0.14	35
Radio & TV	21	0.05	13
Print	16	0.04	10
Total of journalists	409		254

4.2.2. Qualitative data collection

4.2.2.1 Focus Group Discussions (FGDs)

The FGDs guide was used to collect qualitative data from media owners, media managers, academia, media associations, and representatives of public institutions in charge of media development.

4.2.2.2. Key Informant Interviews (KIIs)

KIIs guide was used to collect expert views from representatives of key stakeholders in media development. The targeted respondents included the Ministry of Local Government (MINALOC), Rwanda Utilities Regulatory Authority (RURA), Office of the Ombudsman, the National Commission for Human Rights, the United Nations Development Program (UNDP-Rwanda), Swiss Agency for Development and Cooperation (SDC) as well as media experts.

4.3. Secondary data

Secondary data for the RMB 2024 focused on literature review which consisted in analysing existing laws, policies, reports, other publications in relation to media in Rwanda as well as administrative data.

4.4. Demographic information of respondents

As highlighted in the section above, RMB 2024 involved citizen respondents from 10 sampled districts as well as sampled journalists drawn from the list of accredited journalists.

Table 4: Demographic characteristics for respondents

Category	Journalists	Citizens	Sample size	
	Number	%	Number	%
Total	255	100	710	100
Male	184	72.2%	345	48.6%
Female	71	27.8%	365	51.4%
Age groups	255	100	710	100
[18-30]	59	23.1%	262	36.9%
[31-35]	69	27.1%	112	15.8%
[36-40]	58	22.7%	94	13.2%
[41-45]	33	12.9%	76	10.7%
[46-50]	18	7.1%	53	7.5%
[51-55]	14	5.5%	37	5.2%
[56-60]	3	1.2%	30	4.2%
[61-65]	1	0.4%	20	2.8%
[66 and above]	-	-	26	3.7%
Marital status	255	100	710	100
Single	103	40.4%	206	29.0%
Married	148	58.0%	441	62.1%
Widow	1	0.4%	20	2.8%
Illegally married	1	0.4%	30	4.2%
Divorced	2	0.8%	13	1.8%
Educational level	255	100	710	100
None			80	11.3%
Primary			333	46.9%
Post-primary (CERA)	1	0.4%	98	13.8%
Secondary	19	7.5%	157	22.1%
TVET (IPRC)	1	0.4%	3	0.4%
University	234	91.8%	39	5.5%
Journalism qualification	255	100		
Yes	164	64.31%		
No	91	35.69%		

4.5. Rating colours

Value in %	Rank in colour	
[80-100%]		GREEN
[60-80%]		YELLOW
[40-60%]		AMBER
[0-40%]		RED

The rating colours of the RMB 2024 were changed in comparison with previous editions to harmonize with other RGB research publications.

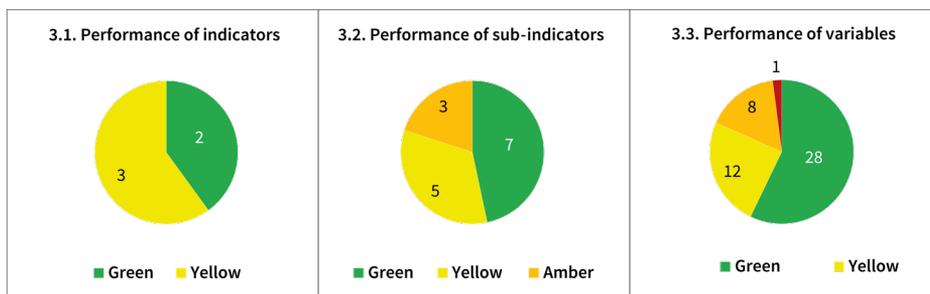


RMB
2024 FINDINGS

5 FINDINGS OF RMB 2024

5.1. Highlights of RMB 2024

Figure 3: Performance of indicators, sub-indicators and variables



In the RMB 2024, two out of five indicators are in green and four are in yellow. The highest performing indicator is Legal and Policy Framework with a score of 90.0% and the lowest performing indicator is Media Development and Professional Capacity with a score of 61.2%.

As shown in figure 3.2 above, of the fifteen sub-indicators, seven are in green, five are in yellow and the remaining three are in amber. All the sub-indicators under the indicator of Legal and Policy Framework are in green. The Media Development and Professional Capacity indicator has no sub-indicator in green; two of its sub-indicators are in yellow while the remaining three are in amber.

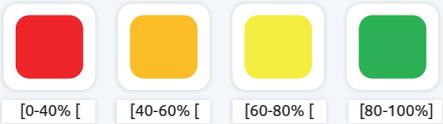
RMB 2024 has a total of 49 variables from which 28 are in green, 12 in yellow, 8 in amber and 1 in red. All the variables under the indicator of Legal and policy framework are in green. The variable in red is that of Women Representation in Media with score of 35.6%.



PERFORMANCE OF INDICATORS



LEGAL AND POLICY FRAMEWORK



5.2. Indicator I: Legal and policy framework

The Legal and policy framework indicator assesses the existence and application of laws and policies that enable the media to thrive and carry out its fundamental roles of educating, informing and entertaining the public.

Legal and policy framework is the highest performing indicator in the RMB 2024 with a score of 90.0%. This indicator has three sub-indicators, namely Legal environment with a score of 100.0%, Awareness and exercise of the freedom of expression with a score of 87.4% as well as Respect and exercise of the media freedom with a score of 82.7% as detailed in the table below:

Table 5: Detailed scores of the indicator of Legal and Policy Framework

INDICATOR	NO	SUB-INDICATORS	DATA	TARGET	SOURCE OF DATA	SCORE
LEGAL AND POLICY FRAMEWORK	1.1	Legal environment				100.0%
	1.1.1	Existence of legal protection of rights and freedoms	100.0%	100.0%	The Constitution of the Republic of Rwanda	100.0%
	1.1.2	Decriminalization of defamation in media	100.0%	100.0%	Penal code 2018 Vs previous one	100.0%
	1.1.3	Access to information is guaranteed by the law	100.0%	100.0%	Access to Information Law	100.0%
	1.2	Awareness and exercise of the freedom of expression				87.4%
	1.2.1	Awareness of freedom of expression				96.5%
	1.2.1.1	Citizens' awareness of their right to freedom of expression	94.1%	100.0%	Citizens Survey	94.1%
	1.2.1.2	Journalists' awareness of their right to freedom of expression	98.8%	100.0%	Journalists Survey	98.8%
	1.2.2	Exercise of freedom of expression				82.1%
	1.2.2.1	Absence of censorship among citizens	93.4%	100.0%	Citizens Survey	93.4%
	1.2.2.2	Absence of self-censorship among citizens	81.5%	100.0%	Citizens Survey	81.5%
	1.2.2.3	Absence of censorship among journalists	88.2%	100.0%	Journalists Survey	88.2%
	1.2.2.4	Absence of self-censorship among journalists	65.1%	100.0%	Journalists Survey	65.1%
	1.2.3	Satisfaction with the respect of the freedom of expression				83.6%
	1.2.3.1	Citizens' satisfaction with the respect of the freedom of expression	86.9%	100.0%	Citizens Survey	86.9%
	1.2.3.2	Journalists' satisfaction with the respect of the freedom of expression	80.4%	100.0%	Journalists Survey	80.4%

INDICATOR	NO	SUB-INDICATORS	DATA	TARGET	SOURCE OF DATA	SCORE
LEGAL AND POLICY FRAMEWORK	1.3.	Respect and exercise of the media freedom				82.7%
	1.3.1	The exercise of the media freedom				74.1%
	1.3.1.1	Absence of censorship	80.8%	100.0%	Journalists Survey	80.8%
	1.3.1.2	Absence of self-censorship	67.5%	100.0%	Journalists Survey	67.5%
	1.3.2	Satisfaction with the respect of the media freedom				89.7%
	1.3.2.1	Journalists' satisfaction with the respect of media freedom	88.2%	100.0%	Journalists Survey	88.2%
	1.3.2.2	Citizens' satisfaction with the respect of media freedom	91.1%	100.0%	Citizens' Survey	91.1%
	1.3.3	Editorial and journalists' independence				84.4%
	1.3.3.1	Editorial independence				92.0%
	1.3.3.1.1	Existence of media independence in programming	89.4%	100.0%	Journalists Survey	89.4%
	1.3.3.1.2	Existence of media house independence in determining editorial line	94.5%	100.0%	Journalists Survey	94.5%
	1.3.3.2	Journalists' independence				76.9%
	1.3.3.2.1	Respect of the right of journalists to uphold factual information	63.1%	100.0%	Journalists Survey	63.1%
	1.3.3.2.2	Respect of the right of journalists to protect their sources	90.6%	100.0%	Journalists Survey	90.6%
	OVERALL INDICATOR SCORE					

Source: Primary data

5.2.1. The legal environment

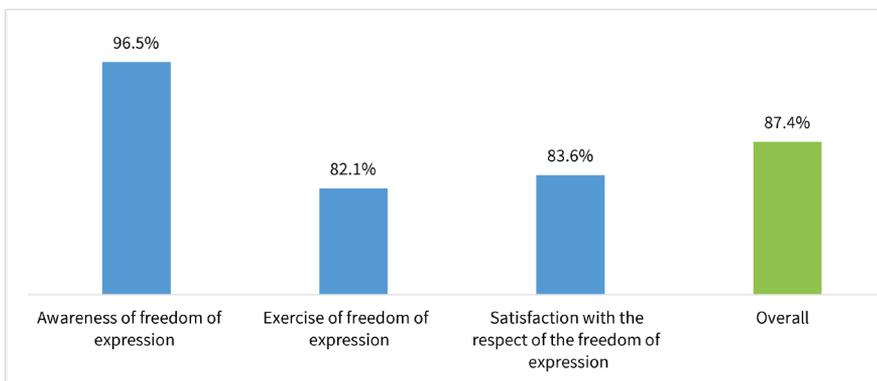
The sub-indicator of Legal environment is composed of three variables which assess the existence of laws guaranteeing a conducive media environment and freedom of expression. Overall, the sub-indicator scored 100.0% aggregated from its three variables, namely Existence of legal protection of rights and freedoms, Decriminalization of defamation in media and Access to information is guaranteed by the law.

The highest scores registered by these variables attest to the existence of legal instruments guaranteeing freedom of expression, media freedom and right to information as well as the decriminalization of defamation. Participants at the FGDs appreciated the existence of laws governing media operations and related matters but they emphasized on the need to review some of the laws to adapt them to current realities.

5.2.2. Awareness and exercise of the freedom of expression

The sub-indicator of Awareness and exercise of the freedom of expression comprises three variables that assess citizens and journalists’ awareness and practice of the right to express opinions without interference or censorship. The overall score of this sub-indicator is 87.4% aggregated from its three variables as shown in the figure below.

Figure 4: Awareness and practice of freedom of expression

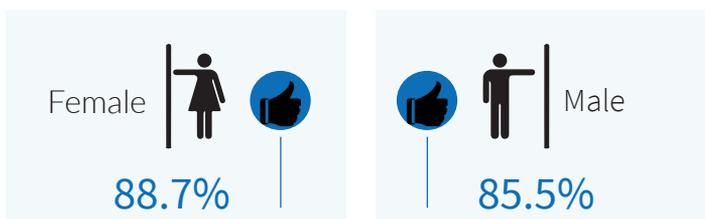


Source: Primary data

Out of the 12.6% respondents who said they were denied the freedom to express their opinions, majority of them said they were denied by local government officials and public servants.

The level of satisfaction with the respect of freedom of expression is slightly higher among women than men as indicated in the figure below.

Figure 5: Citizens’ satisfaction with freedom of expression by gender

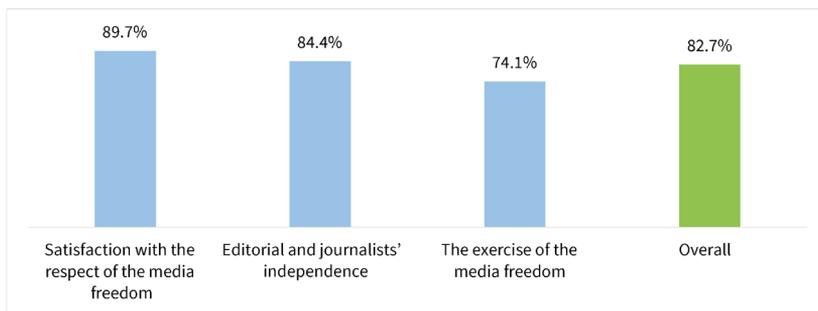


Source: Primary data

5.2.3. Respect and exercise of the media freedom

This sub-indicator measures the exercise of the media freedom, satisfaction with the respect of the media freedom as well as editorial and journalists' independence. In this barometer, the variables of the sub-indicator of Respect and exercise of the media freedom were adjusted to measure how the law is exercised in guaranteeing media freedom. In the previous edition the focus was on the existence of the law and institutions promoting media freedom. The sub-indicator of Respect and exercise of the media freedom scored 82.7% which is an average score of its three variables as shown in the figure below:

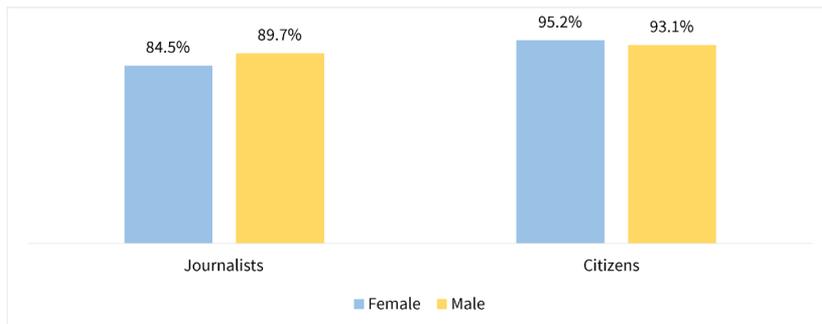
Figure 6: Detailed score of the sub-indicator of respect and exercise of the media freedom



Source: Primary data

The variable of the exercise of the media freedom registered the lowest score in the sub-indicator of Respect and exercise of the media freedom mainly because of a significant proportion of journalists who admitted practicing self-censorship.

Figure 7: Citizens' and journalists' satisfaction with media freedom by gender



Source: Primary data

As shown in the figure above, the level of satisfaction with the respect of the media freedom is higher among the citizens than among journalists. The level satisfaction among citizens is more or less the same between females and males while for journalists, male journalists are more satisfied than their female counterparts.

The variable of Editorial and journalists' independence scored 84.4% and looked at media houses' independence in programming, editorial independence, journalists' rights to uphold factual information and protection of their sources.

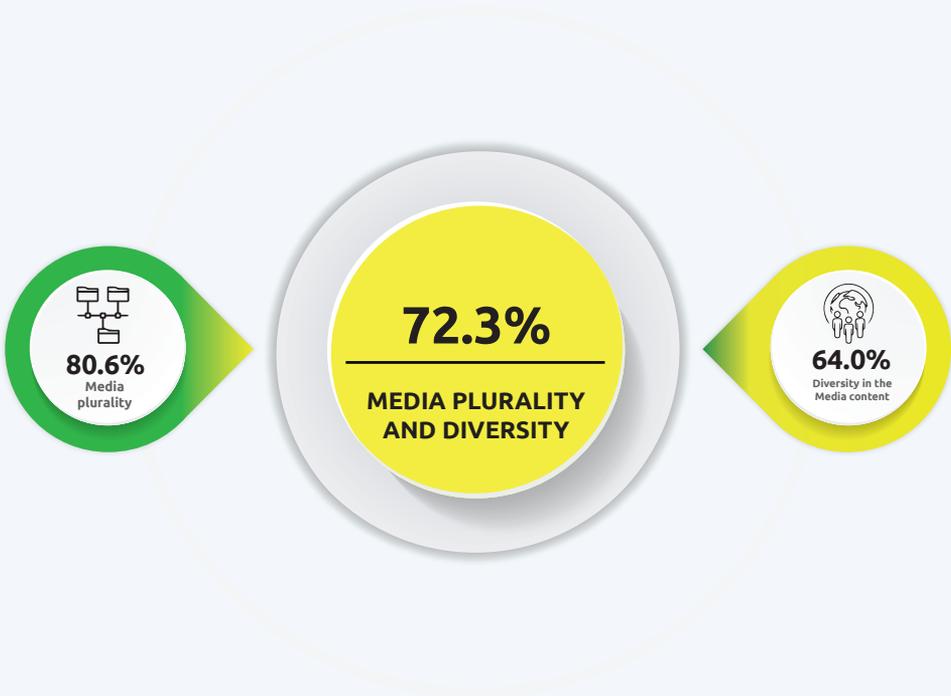
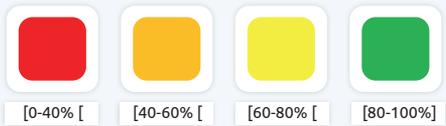
Participants at FGDs commended the Rwandan legal framework that laid the groundwork for media freedom and access to information, which has significantly contributed to the growth of the media sector in Rwanda. However, participants at the FGD said that the right of journalists to uphold factual information is sometimes infringed by employers who want to protect their business interests by omitting information criticizing their business partners.

5.2.4. Recommendations specific to the indicator

- ▶ Engage media owners and managers on the necessity to uphold professionalism by preventing business interests at the expense of factual reporting.
- ▶ Enhance capacity building of media managers and journalists to promote independent reporting and to minimize self-censorship.



MEDIA PLURALITY AND DIVERSITY



5.3. Indicator II: 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 comprises two sub-indicators: (i) Media plurality and (ii) Diversity in the media content. Its overall score is 72.3% as indicated in the table below.

Table 6: Detailed scores for the indicator of Media plurality and diversity

INDICATOR	NO	SUB-INDICATORS	DATA	TAR-GET	SOURCE OF DATA	SCORE
MEDIA PLURALITY AND DIVERSITY	2.1	Media plurality				80.6%
	2.1.1.	Existence of different and diverse types of media outlets	100.0%	100.0%	List of registered media houses and their owners	100.0%
	2.1.2	Existence of multiplicity in ownership of media outlets	100.0%	100.0%	Registered media houses	100.0%
	2.1.3	Geographical distribution in media	26	30	Media house survey	86.7%
	2.1.4	Women representation in media				35.6%
	2.1.4.1	Percentage of women heads of media houses	9.8%	50%	RGB Assessment	19.6%
	2.1.4.2	Percentage of women editorial lead	19.7%	50%	RGB Assessment	39.4%
	2.1.4.3	Percentage of practicing women journalists	23.9%	50%	RMC list of accredited journalists	47.8%
	2.2	Diversity in the Media content				64.0%
	2.2.1	Diversity in editorial line and content				84.3%
	2.2.1.1	Citizens' satisfaction with diversity in media content	94.4%	100.0%	Citizens Survey	94.4%
	2.2.1.2	Journalists' satisfaction with diversity in media content	74.1%	100.0%	Journalists Survey	74.1%
	2.2.2	Language diversity and inclusiveness in media content				43.7%
	2.2.2.1	Language diversity in media content	67.4%	100.0%	Media house survey	67.4%
	2.2.2.2	Sign language use in television broadcast	20.0%	100.0%	Media house survey	20.0%
OVERALL INDICATOR SCORE						72.3%

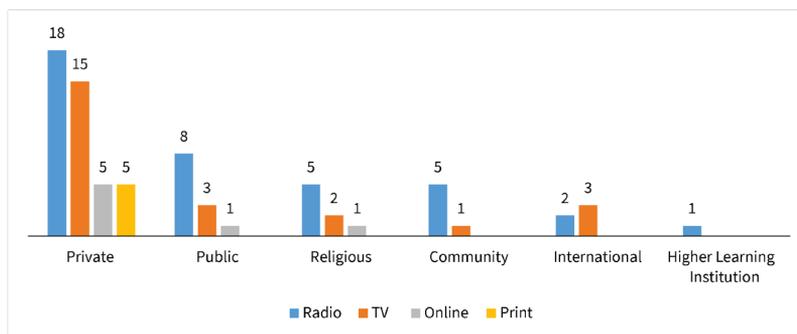
Source: Primary data

5.3.1. Media plurality

The sub-indicator of Media plurality scored 80.6% which is an average of the scores of its variables namely; Existence of different and diverse types of media outlets (100.0%), Existence of multiplicity in ownership of media outlets (100.0%), Geographical distribution in media 86.7% as well as Women representation in media (35.6%).

As highlighted in the figure below, the media landscape in Rwanda reflects diversity in terms of ownership categories that include private, faith based, community, public and international.

Figure 8: Media houses ownership



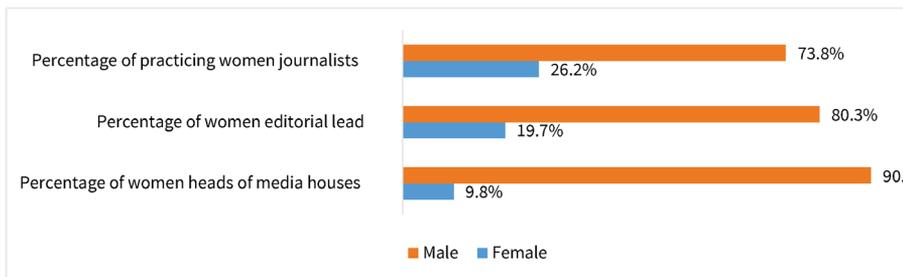
Source: RURA (December, 2023)

As shown in figure above a big portion (67%) of media outlets belongs to private owners. Though there is one public service media, it has various media outlets that deliver different programmes. The different public media outlets include eight radio stations five of which are upcountry, three TV stations, and an online publication.

The geographical distribution in media was assessed by looking at the district-based correspondents of media houses. The findings show that there is a concentration of media outlets in the City of Kigali and secondary cities. As shown on the map below, the geographical diversity of media is high because there is representation of at least one media outlet in twenty-six out of thirty districts of Rwanda.

The variable of women representation in media is the lowest performing with the score of 35.6%. This is a result of under representation of women in media leadership, editorial management and among practicing journalists as shown in the figure below.

Figure 9: women representation in media



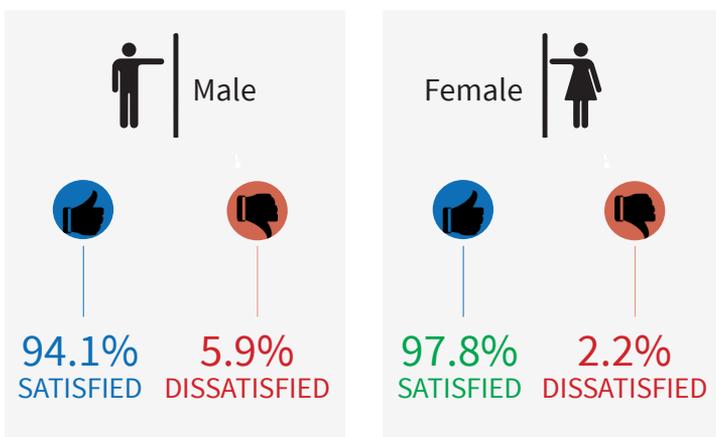
Source: RGB, Assessment of the financial sustainability of media houses and media associations, 2023, p28

5.3.2. Diversity in the media content

The sub-indicator of Diversity in the media content is composed of two variables, namely (i) Diversity in editorial line and content and (ii) Language diversity and inclusiveness in media content. The sub-indicator of Diversity in the media content scored 64.0% which is the average of its two variables as indicated in table 5 above. The low performance of this sub-indicator is result of poor performance of language diversity in media content and use of sign language in TV broadcast as revealed by media house survey.

Regarding the perceptions of males and females on media content diversity, there is no significant difference as shown in the figure below.

Figure 10: Females and males’ perceptions on media content diversity



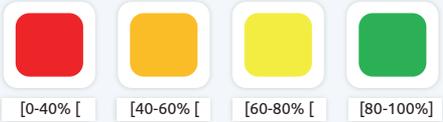
Source: Primary data

5.3.3. Recommendations specific to the indicator

- ▶ Increase capacity building of journalists in sign language to ensure inclusiveness and access to information;
 - ▶ Engage media owners and managers to create conducive environment for women to participate in media leadership, editorial management and journalism practice;
 - ▶ Encourage media owners and managers to implement anti-sexual harassment policy and gender policy in the media sector.
-



MEDIA AS A PLATFORM FOR STRENGTHENING GOVERNANCE AND DEMOCRACY



5.4. Indicator III: Media as a platform for strengthening governance and democracy

The pivotal role of the media is universally recognized as essential for the optimal operation of the democratic state: the media's ability to disseminate information without constraint to all members of society guarantees equitable access to the democratic processes.

By producing and providing reliable information and diverse perspectives, explanations, and analyses, the media can enable public debate and help build an informed and active citizenry.³

The indicator of the Media as platform for strengthening governance and democracy measures the role of media in good governance and democracy through its three sub-indicators: (i) Media as a platform for good governance, (ii) The media as a platform for democracy and (iii) Functioning of the Public Broadcaster. The overall score of the indicator is 81.3% down from 85.0% recorded in RMB 2021. The decline is a result of low satisfaction among journalists with regard to the role of the media in promoting proper use of the Kinyarwanda language (42.4%) as well as promoting Rwanda's cultural values (52.2%).

Table 8: Detailed scores for the Indicator of Media as a platform for strengthening governance and democracy

INDICATOR	NO	SUB-INDICATORS	DATA	TARGET	SOURCE OF DATA	SCORE
MEDIA AS A PLATFORM FOR STRENGTHENING GOVERNANCE AND DEMOCRACY	3.1.	Media as a platform for good governance				82.7%
	3.1.1	Role of the media in educating citizens on national policies and programs				95.1%
	3.1.1.1	Citizens' satisfaction with the role of the media in educating citizens on national policies and programs	96.3%	100.0%	Citizens' survey	96.3%
	3.1.1.2	Journalists' satisfaction with the role of the media in educating citizens on national policies and programs	89.8%	100.0%	Journalists' survey	89.8%
	3.1.2	Role of the media in promoting unity and resilience among Rwandans				93.9%
	3.1.2.1	Citizens' satisfaction with the role of the media in promoting unity and resilience	96.8%	100.0%	Citizens' survey	96.8%
	3.1.2.2	Journalists' satisfaction with the role of the media in promoting unity and resilience	91.0%	100.0%	Journalists' survey	91.0%
	3.1.3	Role of the media in promoting gender equality				87.1%
	3.1.3.1	Citizens' satisfaction with the role of the media in promoting gender equality	92.3%	100.0%	Citizens' survey	92.3%
	3.1.3.2	Journalists' satisfaction with the role of the media in promoting gender equality	81.9%	100.0%	Journalists' survey	81.9%

3. Joint Declaration on Media Freedom and Democracy, 2 May 2023 by The United Nations (UN) Special Rapporteur on the Promotion and Protection of the Right to Freedom of Opinion and Expression, the Organization for Security and Co-operation in Europe (OSCE) Representative on Freedom of the Media, the Organization of American States (OAS) and the African Commission on Human and Peoples' Rights (ACHPR)

INDICATOR	NO	SUB-INDICATORS	DATA	TARGET	SOURCE OF DATA	SCORE	
MEDIA AS A PLATFORM FOR STRENGTHENING GOVERNANCE AND DEMOCRACY	3.1.4	Role of the media in fighting corruption				83.1%	
	3.1.4.1	Citizens' satisfaction with the role of the media in fighting corruption	90.4%	100.0%	Citizens' survey	90.4%	
	3.1.4.2	Journalists' satisfaction with the role of the media in fighting corruption	75.7%	100.0%	Journalists' survey	75.7%	
	3.1.5	Role of the media in fighting injustice	89.4%			89.4%	
	3.1.5.1	Citizens' satisfaction with the role of the media in fighting injustice	94.8%	100.0%	Citizens' survey	94.8%	
	3.1.5.2	Journalists' satisfaction with the role of the media in fighting injustice	83.9%	100.0%	Journalists' survey	83.9%	
	3.1.6	Role of the media in promoting human rights				85.5%	
	3.1.6.1	Citizens' satisfaction with the role of the media in promoting human rights	90.3%	100.0%	Citizens' survey	90.3%	
	3.1.6.2	Journalists' satisfaction with the role of the media in promoting human rights	80.8%	100.0%	Journalists' survey	80.8%	
	3.1.7	Role of the media in promoting the proper use of Kinyarwanda language				60.6%	
	3.1.7.1	Citizens' satisfaction with the role of the media in promoting proper use of Kinyarwanda language	78.9%	100.0%	Citizens' survey	78.9%	
	3.1.7.2	Journalists' satisfaction with the role of the media in promoting proper use of Kinyarwanda language.	42.4%	100.0%	Journalists' survey	42.4%	
	3.1.8	Role of the media in promoting Rwanda's cultural values				66.6%	
	3.1.8.1	Citizens' satisfaction with the role of media in promoting Rwanda's cultural values	81.0%	100.0%	Citizens' survey	81.0%	
	3.1.8.2	Journalists' satisfaction with the role of media in promoting Rwanda's cultural values	52.2%	100.0%	Journalists' survey	52.2%	
	3.2	The media as a platform for democracy					92.5%
	3.2.1	The media reflects in promoting participation of different sections of society					85.0%
	3.2.1.1	Citizens' satisfaction with role of the media in promoting participation of different sections of society		96.2%	100.0%	Citizens' survey	96.2%
	3.2.1.2	Journalists' satisfaction with role of the media in promoting participation of different sections of society		73.7%	100.0%	Journalists' survey	73.7%
	3.2.2	Allocation of equal space by the Public Broadcaster to political actors during elections		100.0%	100.0%	NEC report	100.0%

INDICATOR	NO	SUB-INDICATORS	DATA	TARGET	SOURCE OF DATA	SCORE
MEDIA AS A PLATFORM FOR STRENGTHENING GOVERNANCE AND DEMOCRACY	3.3	Functioning of the Public Broadcaster	68.6%			68.6%
	3.3.1	Public Broadcaster editorial independence exercised	54.5%	100.0%	Journalists' survey	54.5%
	3.3.2	Public Broadcaster programs reflect the interests of citizens				82.7%
	3.3.2.1	Citizens' satisfaction with how the Public Broadcaster programs reflect the interests of citizens	94.5%	100.0%	Citizens' survey	94.5%
	3.3.2.2	Journalists' satisfaction with how the Public Broadcaster programs reflect the interests of citizens	71.0%	100.0%	Journalists' survey	71.0%
OVERALL INDICATOR SCORE						81.3%

Source: Primary data

5.4.1. Media as a platform for good governance

The sub-indicator of Media as a platform for good governance comprises eight variables measuring the contribution of the media in various areas of good governance. The sub-indicator scored 82.7% and six out of its eight variables scored above 80.0% while the remaining two (the Role of the media in promoting Rwanda's cultural values and the Role of the media in promoting the proper use of Kinyarwanda language) scored 66.6% and 60.6% respectively.

Under this sub-indicator, the variable of the media educates citizens on national policies and programs had the highest score (95.1%) while Role of the media in promoting the proper use of Kinyarwanda registered the lowest score (60.6%).

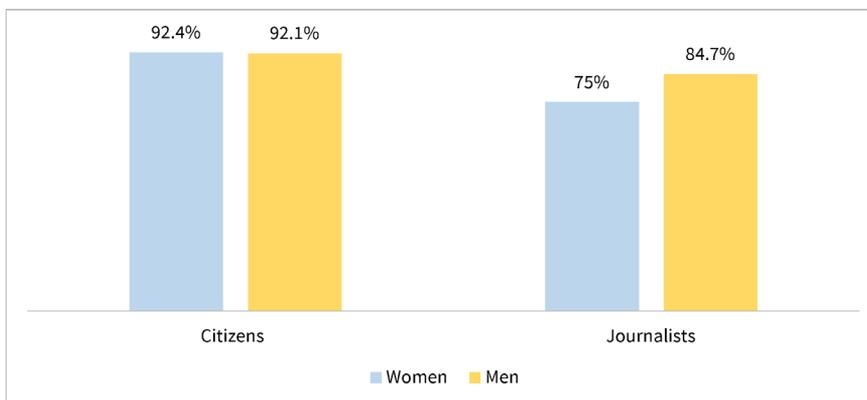
According to research on causes of inappropriate use of the Kinyarwanda in the Rwandan media⁴, some of the reasons for which journalists fail to properly use Kinyarwanda are poor knowledge of Kinyarwanda, disregarding Kinyarwanda, desire to respond to the style of the youth, lack of enough mobilization on appropriate use of Kinyarwanda in the media, poor language education and the habit of mixing languages.

The variable of the Role of the media in fighting corruption scored 83.1% which is an average of its two composites: citizens' satisfaction with the role of the media in fighting corruption (90.4%) and Journalists' satisfaction with the role of the media in fighting corruption (75.7%).

The variable of the Role of the media in promoting gender equality scored 87.1% and as shown by the figure below the citizens' satisfaction with the role of the media in promoting gender equality is higher than journalists' satisfaction.

4. Niyomugabo, C., & Twilingiyimana, C. (2012). Imikoreshereze y'ikinyarwanda mu Bitangazamakuru byo mu Rwanda. Kigali: UR

Figure 11: Citizens' and journalists' satisfaction with the role of media in promoting gender equality by gender



Source: Primary data

5.4.2. The media as a platform for democracy

This sub-indicator scored 92.5% which is an average of its two variables, namely the Media reflects participation of different sections of society with a score of 85.0% and the Allocation of equal space by the Public Broadcaster to political actors during elections with a score of 100.0%. The latter's score is attributed to a report of the National Electoral Commission indicating that RBA demonstrated accuracy, impartiality, objectivity in the coverage of 2018 of parliamentary elections (latest elections organized in Rwanda prior to the production of the RMB 2024).

The report reads “the ethical and standard principles of professionalism especially accuracy, impartiality, objectivity and provision of equitable time to contestants were highly observed. They (contestants) were all subjected to the same conditions in news coverage, talk show broadcasts and the airing of their spot adverts.”

5.4.3. Functioning of the public broadcaster

This sub-indicator is composed of two variables assessing the performance of the Public Broadcaster as it is expected to serve public interests. [Law N0 42/2013 Of 16/06/2023 establishing Rwanda Broadcasting Agency and determining its mission, organization and functioning] The number of variables under this sub-indicator changed from four to two. The two variables removed were linked to the existence of laws which are not supposed to be assessed in each edition of the barometer. The removed variables are Public Broadcaster mandate clearly defined and Independence of the Public Broadcaster oversight body guaranteed by law.

The score of this sub-indicator is 68.6% resulting from the average of its two variables. The variable of Public Broadcaster programs reflects the interests of citizens scored 82.7% averaged from its two composites: Citizens' satisfaction with how the Public Broadcaster programs reflect the interests of citizens with a score of 94.5% and Journalists' satisfaction with how the Public Broadcaster programs reflect the interests of citizens that scored 71.0%. On the other hand, the journalists' perception on the Public Broadcaster's editorial independence stands at 54.5%.

5.4.4. Recommendations specific to the indicator

- ▶ Put in place mechanisms to preserve Rwandan culture and promote the proper use of Kinyarwanda in the media;
- ▶ Increase media content on the fight against corruption;
- ▶ The public Broadcaster should increase content and programs reflecting interests of citizens.



MEDIA DEVELOPMENT AND PROFESSIONAL CAPACITY



[0-40% [



[40-60% [



[60-80% [



[80-100%]



5.5. Indicator IV: 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. In this edition of RMB, the number of sub-indicators under this indicator was changed from seven to five as some of them and their variables were restructured and renamed for better analysis.

The variable of Media Infrastructural capacity was removed while that of Compliance with professional standards was transformed into a variable measured under the sub-indicator of media self-regulation.

The overall score of this indicator is 60.7% against 62.4% of the previous edition of the barometer as shown in the table below.

Table 8: Detailed scores for the indicator of the Media development and professional capacity

INDICATOR	NO	SUB-INDICATORS	DATA	TARGET	SOURCE OF DATA	SCORE
MEDIA DEVELOPMENT AND PROFESSIONAL CAPACITY	4.1	Professional training for media practitioners				71.5%
	4.1.1	Percentage of journalists trained in the last two years	67.1%	100.0%	Journalists' survey	67.1%
	4.1.2	Percentage of journalists who confirmed the relevance of the received training	92.4%	100.0%	Journalists' survey	92.4%
	4.1.3	Percentage of journalists trained in specialized reporting	66.1%	100.0%	Journalists' survey	66.1%
	4.1.4	Percentage of journalists who believe that qualification in media studies should be a requirement to practice journalism	60.4%	100.0%	Journalists' survey	60.4%
	4.2	The contribution of media associations to media development				51.0%
	4.2.1.	Journalists' satisfaction with the contribution of media associations to their professional development	60.8%	100.0%	Journalists' survey	60.8%
	4.2.2.	Journalists' satisfaction with the contribution of media associations to their welfare	41.2%	100.0%	Journalists' survey	41.2%
	4.3.	Working conditions for media practitioners				69.9%
	4.3.1.	Employment terms clearly defined and respected				59.9%
	4.3.1.1	Journalists who confirmed having employment contracts	80.0%	100.0%	Journalists' survey	80.0%
	4.3.1.2	Journalists who confirmed receiving salaries	84.7%	100.0%	Journalists' survey	84.7%

INDICATOR	NO	SUB-INDICATORS	DATA	TARGET	SOURCE OF DATA	SCORE
MEDIA DEVELOPMENT AND PROFESSIONAL CAPACITY	4.3.1.3	Competitiveness of salaries in the media sector				17.4%
	4.3.1.3.1	Media owners/managers who believe that salaries for media practitioners are competitive	12.5%	100.0%	RGB ASSESSMENT	12.5%
	4.3.1.3.2	Journalists who believe that salaries for media practitioners are competitive	22.3%	100.0%	RGB ASSESSMENT	22.3%
	4.3.1.4	Journalists having social security coverage	59.6%	100.0%	Journalists' survey	59.6%
	4.3.1.5	Journalists having health insurance coverage	49.0%	100.0%	Journalists' survey	49.0%
	4.3.1.6	Journalists allowed to take annual leave	68.6%	100.0%	Journalists' survey	68.6%
	4.3.2.	Safety of journalists				80.7%
	4.3.2.1	Journalists' satisfaction with safety at workplace	79.2%		Journalists' survey	79.2%
	4.3.2.2	Absence of profession-related harm				82.3%
	4.3.2.2.1	Absence of profession-related harassment	86.3%	100.0%	Journalists' survey	86.3%
	4.3.2.2.2	Inexistence of sexual harassment	44.4%	100.0%	Journalists' survey	44.4%
	4.3.2.2.3	Absence of profession-related imprisonment	98.4%	100.0%	Journalists' survey	98.4%
	4.3.2.2.4	Absence of profession-related assassination	100.0%	100.0%	Journalists' survey	100.0%
	4.3.3	Journalists' satisfaction with equipment to facilitate collection and dissemination of content	69.0%	100.0%	Journalists' Survey	69.0%
	4.4	Media self-regulation				55.8%
	4.4.1	Journalists' satisfaction with effectiveness of the media self-regulatory body				59.9%
	4.4.1.1	Journalists' satisfaction with handling of media content related complaints	54.1%	100.0%	Journalists' survey	54.1%
	4.4.1.2	Journalists' satisfaction with independence of the media self-regulatory body	67.5%	100.0%	Journalists' survey	67.5%
	4.4.1.3	Journalists' satisfaction with their accreditation process	73.7%	100.0%	Journalists' survey	73.7%
	4.4.1.4	Journalists' satisfaction with RMC advocacy on issues affecting the media sector	44.3%	100.0%	Journalists' survey	44.3%
	4.4.2	Compliance with professional standards				51.7%
	4.4.2.1	Journalists' satisfaction with their knowledge of the professional code of ethics	47.5%	100.0%	Journalists' survey	47.5%
	4.4.2.2	Journalists' satisfaction with their respect of the media professional code of ethics	43.1%	100.0%	Journalists' survey	43.1%
4.4.2.3	Journalist's satisfaction with fair and responsible journalism				64.5%	

INDICATOR	NO	SUB-INDICATORS	DATA	TARGET	SOURCE OF DATA	SCORE
MEDIA DEVELOPMENT AND PROFESSIONAL CAPACITY	4.4.2.3.1	Journalists' cautiousness of information impact on the society	61.6%	100.0%	Journalists' survey	61.6%
	4.4.2.3.2	Proactiveness in rectification of erroneous content	67.5%	100.0%	Journalists' survey	67.5%
	4.5	Media houses financial sustainability				55.5%
	4.5.1	Effectiveness of media houses management				59.0%
	4.5.1.1	Percentage of media houses with business plans	71.8%	100.0%	RGB Assessment	71.8%
	4.5.1.2	Percentage of media houses with action plans	48.7%	100.0%	RGB Assessment	48.7%
	4.5.1.3	Percentage of media houses with financial manuals	46.2%	100.0%	RGB Assessment	46.2%
	4.5.1.4	Percentage of media houses with internal rules and regulations	59.0%	100.0%	RGB Assessment	59.0%
	4.5.1.5	Percentage of media houses with financial reports	69.2%	100.0%	RGB Assessment	69.2%
	4.5.1.6	Percentage of media houses that conduct audit	59.0%	100.0%	RGB Assessment	59.0%
	4.5.2	Media houses financial viability				52.1%
	4.5.2.1	Percentage of media houses with capacity to pay staff salaries regularly	69.2%	100.0%	RGB Assessment	69.2%
	4.5.2.2	Percentage of media houses with capacity to pay mast rental fee	34.6%	100.0%	RGB Assessment	34.6%
	4.5.2.3	Percentage of media houses that comply with tax payment	57.7%	100.0%	RGB Assessment	57.7%
	4.5.2.4	Percentage of media houses making profits	46.7%	100.0%	RGB Assessment	46.7%
OVERALL INDICATOR SCORE						60.7%

Source: Primary data

In this edition of RMB, the indicator of Media development and professional capacity is the lowest performing with a score of 60.7%. It is important to highlight that this indicator continues to come among the least performing indicators since the inception of the barometer whereby it came on the last position in the RMB2016 and RMB2021.

All the five sub-indicators of Media development and professional capacity indicator scored below 75% whereby Professional training for media practitioners leads other sub-indicators with a score of 71.5%. On the other hand, the sub-indicator of the contribution of media associations to media development came last with a score of 51.0%.

5.5.1. Professional training for media practitioners

The sub-indicator of Professional training for media practitioners had a score of 71.5% resulting from the average of its four variables: (i)Percentage of journalists trained in the last two years (67.1%), (ii)Percentage of journalists who confirmed the relevance of the received training (92.4%), (iii) Percentage of journalists trained in specialized reporting (66.1%), (iv) Percentage of journalists who believe that qualification in media studies should be a requirement to practice journalism (60.4%).

As far as access to training is concerned, 56 (78.9%) out of 71 interviewed female journalists against 115 (62.5%) out of 184 interviewed male journalists affirmed having been trained over the last two years. The relatively big percentage of female journalists who received trainings in comparison to their male counterparts, may be justified by the fact that, in addition to trainings common to all journalists, there are specific trainings reserved to female journalists.

The findings from the FGD discussion emphasized on the need for the introduction of academic qualifications as a requirement to practice journalism. The participants said “People without academic background in journalism should go through a certified training before being accredited as journalists. There should also be continuous and specialized training for practicing journalists no matter whether they studied journalism or not.”

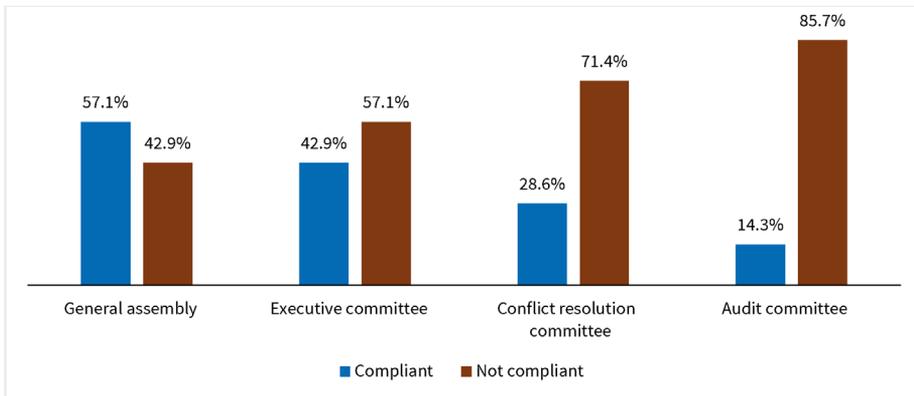
5.5.2. The contribution of media associations to media development

This sub-indicator scored 51.0% against 67.8% of the previous edition of RMB. There were changes in the sub-indicator where the number of its variables changed from three to two. The variable of media associations contribute to the welfare of their members was removed as the intended goal of this variable was captured in the two remaining variables.

The poor performance of this sub-indicator resulted from the low performance of its two variables: (i) Journalists’ satisfaction with the contribution of media associations to their professional development with a score of 60.8%, (i) Journalists’ satisfaction with the contribution of media associations to their welfare with a score of 41.2%.

An assessment conducted by RGB on the functioning of media associations indicated that key organs of these institutions are not functioning properly as majority of them do not comply with statutory meetings.

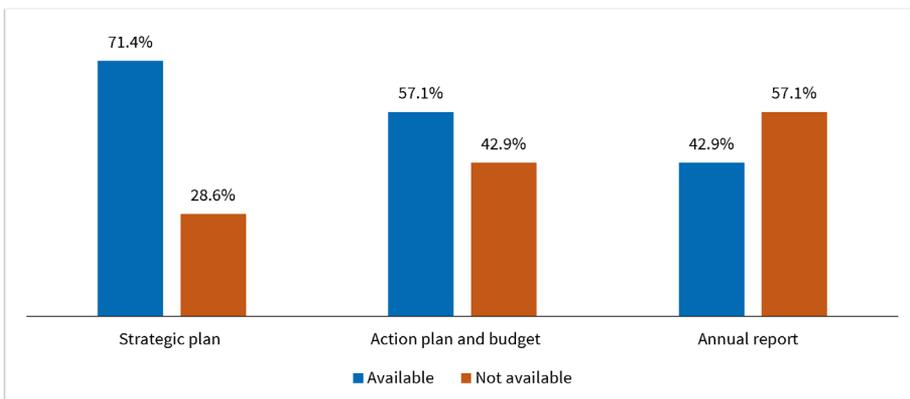
Figure 12: Media associations compliance with statutory meetings of their organs



Source: RGB, Assessment of the financial sustainability of media houses and media associations, 2023, p42

The assessment indicated that failure to organize statutory meetings for media associations affect their efficiency and effectiveness in terms of management, planning and reporting, considering the fact that those meetings are used to approve key managerial documents.

Figure 13: Availability of key managerial documents in media associations



Source: RGB, Assessment of the financial sustainability of media houses and media associations, 2023, p43

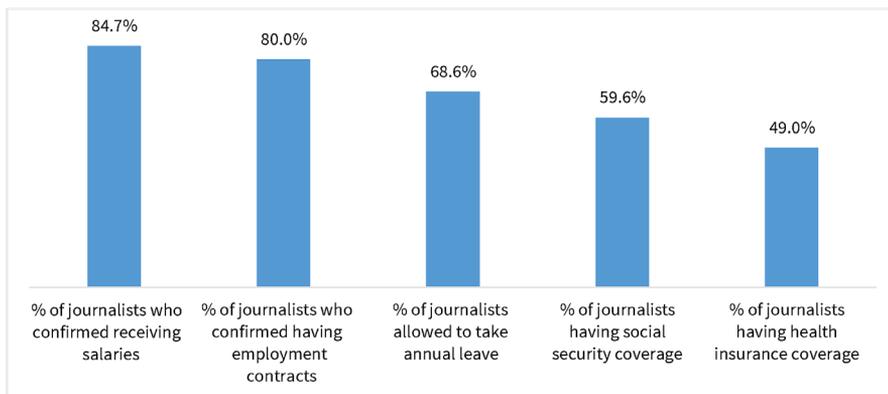
A significant proportion of the assessed media associations do not have key managerial documents supposed to guide their operations and activities. This confirms the inefficiency and ineffectiveness in the functioning of these associations.

5.5.3. Working Conditions for media practitioners

The sub-indicator of Working conditions for media practitioners is composed of three variables against two variables in the previous RMB edition. The small change in the number of variables occurred with the introduction of the variable of Journalists' satisfaction with equipment with facilitate collection and dissemination of content. In this edition of RMB, the sub-indicator of Working conditions for media practitioners scored 69.9% against 74.3% of the previous RMB edition.

The decline of this sub-indicator is essentially attributed to the perception among media managers and journalists on the competitiveness of salaries in the media sector which scored 17.4%. In addition, inadequate social and health insurance coverage among media practitioners is another factor which affected the performance of this sub-indicator as highlighted in the figure below.

Figure 14: Experience of journalists with employment related rights and benefits



Source: Primary data

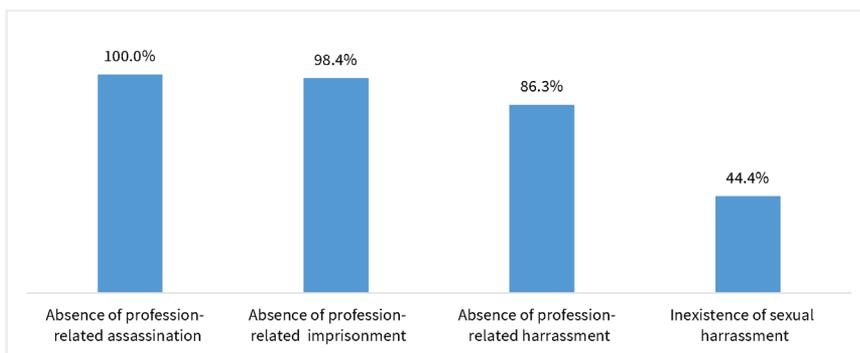
Over 84% of interviewed journalists confirmed to receive their salaries on time. In spite of that, an assessment conducted in media houses indicated that a significant percentage (44.5%) of staff across all media house categories are paid a monthly salary of Frw 200,000 and below.

Around half of interviewed journalists do not have health insurance and social security coverage. Participants at the FGDs observed that the working conditions of journalists are not conducive and

that is why there is a high staff turnover in the profession: “There are cases of private media houses that are making a lot of money but still their journalists work in bad conditions including not being paid.”

The variable of safety of journalists registered a score of 80.7% which is the highest under this sub-indicator. Under this variable, the performance of aspects related to freedom from profession-related harm is shown in the figure below.

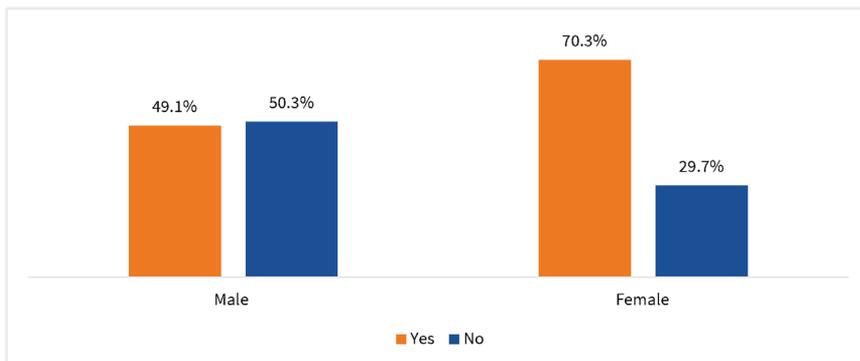
Figure 15: Detailed scores of the variable of freedom from profession-related harm



Source: Primary data

A significant percentage of interviewed journalists (55%) believe that there is sexual harassment in the media sector and the percentage is higher among female journalists than male journalists as shown in the figure below.

Figure 16: Journalists’ perception on whether there is sexual harassment in the media sector



Source: Primary data

5.5.4. Media self-regulation

The sub-indicator of Media Self-regulation captured elements related to the functioning of the media self-regulatory body as well as professionalism of journalists. The sub-indicator scored 55.8% against 67.6% in the previous edition of RMB.

The variable of Journalists' satisfaction with effectiveness of the media self-regulatory body had a score of 59.9%. The low performance of this variable is attributed to low level of journalists' satisfaction with execution of its duties including the handling of media content related complaints (54.1%) and advocacy on issues affecting the media sector (44.3%).

Participants at the focus discussion observed that the RMC "was not fully empowered to execute its mandate. It is not respected by media managers and journalists. It is not delivering on its mandate properly yet it should be a respected body, making an impact in the media industry." They called for the revision of the functioning of the RMC to ensure that the body is empowered and capacitated to properly discharge its duties.

The variable on compliance with professional standards scored 51.7%. The low performance of this variable points to limited knowledge of the media professional code of ethics and its violation, lack of journalists' cautiousness on the impact of their content on the society, and low level of compliance with proactive rectification of inaccurate content.

Data from the Rwanda Media Commission indicate that most of the media content related complaints received in 2022 and 2023 concerned cases of defamation, publication of inaccurate information, unbalanced articles and violation of copyright. Other complaints were about plagiarism, use of indecent photos and violation of the presumption of innocence.

5.5.5. Media houses financial sustainability

The sub-indicator of Media industry viability and financial sustainability was restructured and renamed to become Media houses financial sustainability. It is composed of two variables (Effectiveness of media houses management and Media houses financial viability) which led to its overall score of 55.5%.

The variable of effectiveness of media houses management looked at the existence of key managerial documents and tools in media houses as captured in the figure below.

Figure 17: Percentage of media houses with key managerial documents

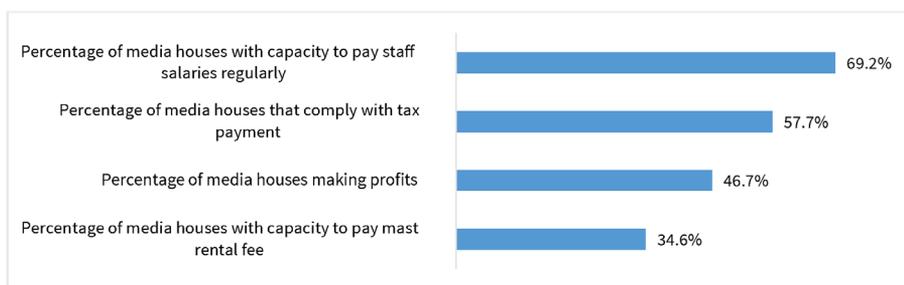


Source: RGB, Assessment of the financial sustainability of media houses and media associations, 2023, p38

There is a significant proportion of media houses that do not have key financial management tools which are supposed to guide their operations and making of decision regarding their businesses.

Under the media houses financial viability variable, this barometer assessed the capacity of media houses to pay for key services and whether they are making profits which are key to sustain their operations. The low score of this variable is a result of the fact that a significant percentage of media houses are struggling to pay staff salaries, mast rental fee, and comply with tax obligations which can be attributed to their inability to make profits.

Figure 18: Media houses performance vis-à-vis key indicators of media financial viability



Source: Source: RGB, Assessment of the financial sustainability of media houses and media associations, 2023

5.5.6. Recommendations Specific to the indicator

- ▶ Align journalists' training programs to current market realities
 - ▶ Strengthen the capacity of media associations to contribute to the development of the media sector;
 - ▶ Increase awareness among media practitioners about their rights and obligations as outlined in the labour law;
 - ▶ Empower the media self-regulation in order to enhance compliance with media professional code of ethics;
 - ▶ Enhance and support initiatives meant to improve professionalism
 - ▶ Put in place mechanisms that promote self-reliance and media sustainability.
-



INFORMATION TRANSMISSION AND ACCESS



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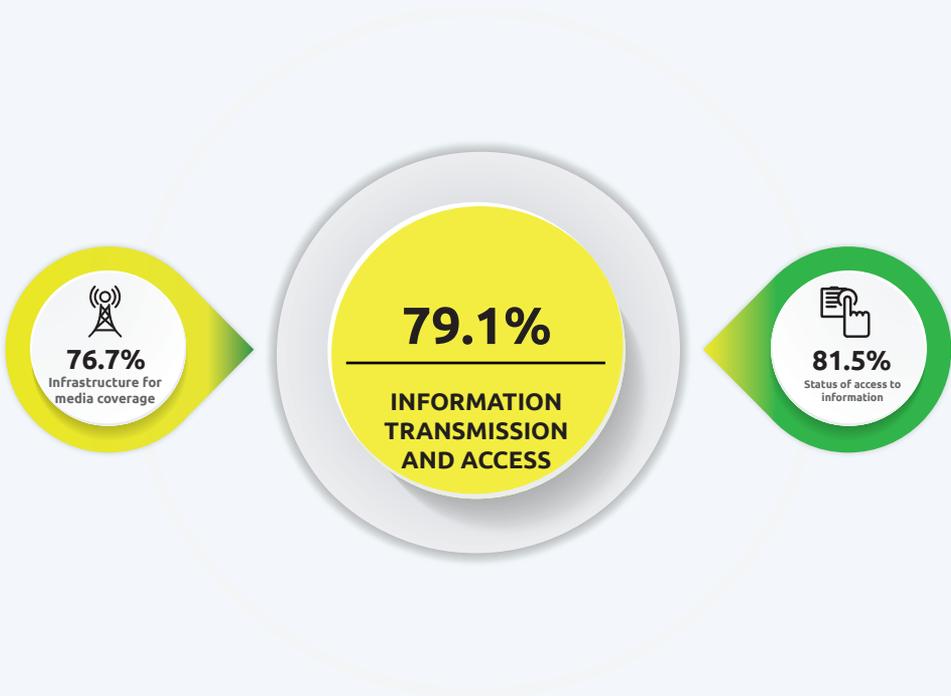
[40-60% [



[60-80% [



[80-100%]



5.6. Indicator V: Information transmission and access

This indicator evaluates the infrastructure for media coverage and the status of access to information, based on specific sub-indicators and variables. In order to better capture and analyse current trends in access to information and citizen trust in media outlets, the indicator of Information transmission and access underwent changes compared to the previous RMB edition. Its name changed from “Access to Information” to “Information transmission and access”.

The indicator scored 79.1% derived from its two sub-indicators as shown in the table below.

Table 9: Detailed scores of the indicator of Information transmission and access

INDICATOR	NO	SUB-INDICATORS	DATA	TAR-GET	SOURCE OF DATA	SCORE	
INFORMATION TRANSMISSION AND ACCESS	5.1	Infrastructure for media coverage				76.7%	
	5.1.1	Radio signal coverage	99.0%	100.0%	RURA, Jan. 2023	99.0%	
	5.1.2	TV signal coverage	80.0%	100.0%	RURA, Jan. 2023	80.0%	
	5.1.3	Mobile cellular-telephone subscriptions per 100 inhabitants	96.3%	100.0%	RURA, Mar. 2024	96.3%	
	5.1.4	Internet subscriptions per 100 inhabitants	68.9%	100.0%	RURA, Dec. 2023	68.9%	
	5.1.5	Citizens' satisfaction with access to Radio	87.2%	100.0%	Citizens' Survey	87.2%	
	5.1.6	Citizens' satisfaction with access to Television	62.0%	100.0%	Citizens' Survey	62.0%	
	5.1.7	Citizens' satisfaction with access to online outlets	43.2%	100.0%	Citizens' Survey	43.2%	
	5.2.	Status of access to information				81.5%	
	5.2.1	Awareness of the right to information				90.8%	
	5.2.1.1	Level of citizens' awareness on their right to access information	82.4%	100.0%	Citizens' survey	82.4%	
	5.2.1.2	Level of journalists' awareness on their right to access information	99.2%	100.0%	Journalists Survey	99.2%	
	5.2.2	Public satisfaction with access to information				72.2%	
	5.2.2.1	Citizens' satisfaction with access to information	86.5%		Citizens' Survey	86.5%	
	5.2.2.2	Journalists' satisfaction with access to information				51.9%	
	5.2.2.2.1	In public institutions	50.6%		Journalists' survey	50.6%	
	5.2.2.2.2	In private institutions	65.1%		Journalists survey	65.1%	
	OVERALL INDICATOR SCORE						79.1%

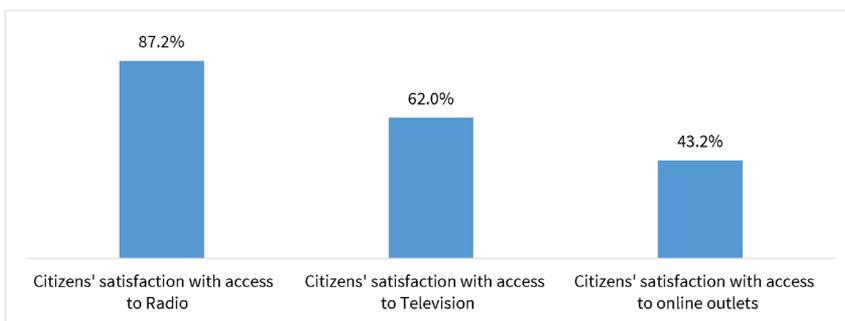
5.6.1. Infrastructure for media Coverage

This sub-indicator assesses the physical and technical means available for transmitting information to the public. It scored 76.7% resulting from the average of scores of its seven variables.

According to data from RURA the nationwide radio signal coverage is possible through RBA networks that as of January 2023 had 33 transmitters located across the country and serve various radio broadcasters in the country. In digital TV broadcasting, there are two signal distributors namely Rwanda Broadcasting Agency (RBA) with 14 transmitters located at 14 sites and PANAFRICA Network Group Ltd with 18 transmitters located at 6 sites.⁶

The findings indicate that Radio signal coverage is almost 100% while that of TV is 80% on RBA network and 60% on PANAFRICA Network Group Ltd. This correlates with citizens’ satisfaction with access to Radio (87.2%) and Television (62.0%) as shown in the figure below.

Figure 19: Citizens’ satisfaction with access to various media outlets



The performance of this sub-indicator and its variables is also justified by continuing advancement in ICTs leading to widespread ownership of mobile cellular-telephone and access to internet which serve as enablers for transmission and access to information for the public.

5.6.2. Status of Access to Information

The sub-indicator of Status of access to information assesses awareness of citizens’ right to information and the practical respect of the right. The overall score of the sub-indicator is 81.5% which is an average from its two constituting variables: Awareness of the right to information with a score of 90.8% and public satisfaction with access to information with a score of 72.2%.

6. RURA, 2023

While awareness of the right to information is high, satisfaction with the respect of the right is relatively low mainly due to the level of journalists' dissatisfaction with access to information both from public and private institutions as shown in the figure below.

Figure 20: Journalists' satisfaction and experience with access to information



Source: Primary data

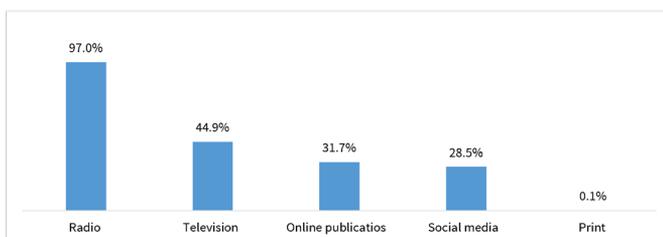
Participants at the FGDs appreciated the enacting of the Access to Information Law and appointment of the information officers but called for appropriate enforcement of the law to ensure access to information for journalists and public in general.

Interviewed local government officials indicated that they are generally cooperative when it comes to handling requests for information. However, they indicated that some journalists exhibit unprofessional behaviours while requesting for information, such as putting pressure on information holders denying ample time to thoroughly collect the information being requested, putting someone on air without notifying them during telephone interviews, blackmailing and intimidation.

5.6.3. Media consumption habits

The Rwanda Media Barometer 2024 also looked at the media consumption habits among the audience with regard to trust with media outlets, preference with media sources of information as well as the use of social media platforms.

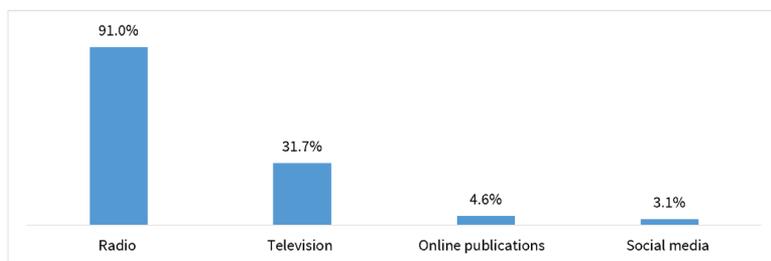
Figure 21: Citizens' preference with media sources of information



Source: Primary data

Radio is the most preferred medium, with 97.0% of citizens using it for information. Television follows, with 44.9% of respondents indicating it as their preferred source of information. This data highlights a strong preference for traditional media such as radio and television over new digital sources such as online platforms and social media. This trend in media consumption habit is also justified by the widespread access to infrastructure for radio and TV broadcasting as well as the low level of digital media literacy. Radio is also the most trusted source of information for citizens while their trust in online publication, social media and print remains very low as shown in the figure below.

Figure 22: Level of citizens trust in media sources of information

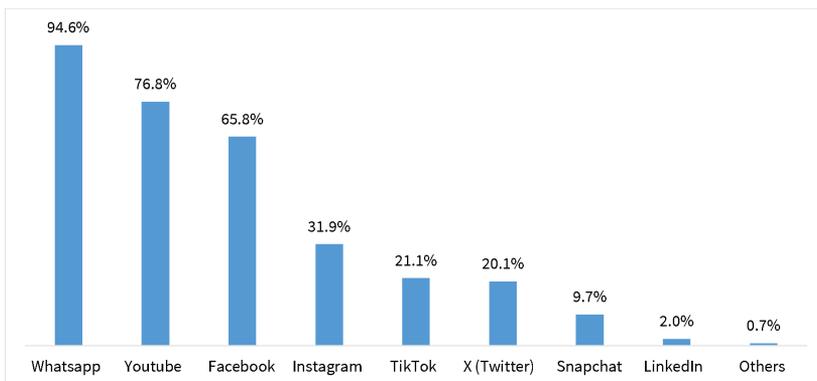


Source: Primary data

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

The figure below shows social media platforms used the most by citizens.

Figure 23: Use of social media by citizens



Source: Primary data

This data indicates a strong preference for messaging and video-sharing platforms, with WhatsApp, YouTube, and Facebook being the top three choices among citizens.

5.6.4. Recommendations specific to the pillar

- ▶ Increase public awareness on the right to access public information;
- ▶ Increase infrastructure that facilitate access to online information
- ▶ Promote digital access through affordable internet
- ▶ Increase digital media literacy
- ▶ Sensitize journalists to uphold responsible and ethical journalism

6



STATUS OF IMPLEMENTATION OF THE PREVIOUS RMB RECOMMENDATIONS

The RMB 2024 provides the status of implementation of recommendations of the previous edition. This is a new initiative to assess the effectiveness of recommendations offered by the previous edition of RMB. The table below shows how the concerned institutions implemented the recommendations of RMB 2021.

Table 10: Status of implementation of RMB 2021 recommendations

Recommendation	Implementing institution	IMPLEMENTATION STATUS
1. Review the requirements for exercising the journalism profession	Ministry of Local Government (MINALOC) Rwanda Governance Board (RGB)	The Rwanda Governance Board (RGB) in collaboration with the Ministry of Local Government (MINALOC) conducted engagements with various stakeholders in the process of reviewing the Media Policy. The need to revise requirements to be allowed to practice the journalism profession was considered in the final draft media policy awaiting approval by competent authorities.
2. Sensitize media owners and managers to comply with the labour law	Rwanda Governance Board (RGB) Media houses and associations	An Assessment of the Financial Sustainability of Media Houses and Media Associations was conducted in 2023 and identified issues related to employees' rights such as employment contracts, health insurance coverage, social security coverage, payment of salaries, annual leave, and other statutory entitlements and employment benefits. Engagements with media owners and managers use the findings of the assessment to advocate for compliance with the labour law within media houses. Basing on the findings of the above-mentioned assessment, media houses and associations launched a peer-learning initiative "Nyigiraho Twisungane" whereby small media houses visit a
3. Improve financial and human resource management within media houses	Rwanda Governance Board (RGB) Media Houses & Associations	<ul style="list-style-type: none"> ▶ The Assessment of the financial sustainability of media houses and media associations identified key issues affecting financial and human resource management within media houses and associations and made recommendations on how to address them. ▶ As part of activities held under the Media Development and Sustainability Grants, RGB trained 47 media owners and managers on financial management: book keeping, financial planning, budgeting, financial monitoring or reporting, internal controls as well as procurement management. ▶ In the context of Rwanda Media Development Program, 36 media houses were coached in Financial and Human Resources Management.

Recommendation	Implementing institution	IMPLEMENTATION STATUS
4. Strengthen media-self regulation to effectively enforce the code of ethics and conduct for journalists	Ministry of Local Government (MINALOC) Rwanda Governance Board (RGB) Media Self-Regulatory Body	<ul style="list-style-type: none"> ▶ The media policy under review proposes strategic mechanisms to reform the media self-regulatory Body ▶ The Rwanda Governance Board (RGB) in collaboration with stakeholders provides financial support to the media self-regulatory body to cover daily operations and other activities that are key for strengthening media self-regulation ▶ The Rwanda Media Commission conducted a review of the code of ethics for journalism practice in Rwanda.
5. Support initiatives aimed at attracting investments in the media industry.	Rwanda Development Board (RDB) Rwanda Governance Board (RGB)	RGB engaged RDB to discuss on initiatives that might attract investment in the media industry. RDB highlighted existing initiatives that can benefit the media industry including: <ul style="list-style-type: none"> ▶ 15% Corporate Income Tax (CIT) is granted to a registered investor in the information and communication technology sector, with an investment involving one of the following activities: information and communication technology and knowledge-based services, manufacturing or assembly; ▶ Investors in the film industry receive the following incentives, if they fulfil the required conditions: <ul style="list-style-type: none"> ▶ Value- Added Tax (VAT) exemption for goods and services procured locally ▶ Withholding Tax (WHT) exemption for foreign specialized services
6. Increase public awareness on the Access to Information Law	Rwanda Governance Board (RGB)	Rwanda Governance Board (RGB) and stakeholders conducted awareness campaigns across the country through both physical meetings and media programs targeting local government officials, representatives of civil society organizations, security organs, journalists as well as the general public.
7. Improve radio/television signal coverage and the quality of internet networks in some parts of the country	Ministry of ICT and Innovation (MINICT) Rwanda Utilities Regulatory Authority (RURA) Rwanda Broadcasting Agency (RBA)	<ul style="list-style-type: none"> ▶ MINICT mobilized 20 billion Rwanda Francs from the Universal Access Fund to invest into the provision of internet in 47 disconnected Sectors across the country ▶ As of December 2023, Radio Rwanda covers almost the whole Rwandan territory at the rate of 99.0% while Rwanda Television covers 80.0% using terrestrial masts and there are 15 free- to air channels most of which in Kinyarwanda language that are accessible using terrestrial masts. Satellite-based TV services are accessible countrywide at the rate of 100%. ▶ Telecommunication companies expanded their networks countrywide by increasing the number of towers which resulted in increased internet connection in different parts of the country

Recommendation	Implementing institution	IMPLEMENTATION STATUS
8. Raise public awareness on digital media literacy	Ministry of ICT and Innovation (MINICT)	In the framework of Digital Ambassadors Program (DAP) aimed at increasing the number of digitally literate citizens and promoting their use of e-services, MINICT continued awareness on digital literacy.
	Rwanda Utilities Regulatory Authority (RURA)	RURA and stakeholders conducted public awareness on how to access, analyse and use digital media content.
9. Media capacity building programs should be tailored to the needs of media professionals and the changing media sector dynamics	Rwanda Governance Board (RGB)	<ul style="list-style-type: none"> ▶ A media capacity building needs assessment was conducted in 2023 to inform capacity building initiatives. ▶ Three universities with journalism teaching programs initiated the review their curricula to align them with media market needs. These University of Rwanda, the East African University Rwanda and Mount Kigali University. ▶ A change in methodology was initiated for continuous journalist trainings whereby focus was put on more practical than theoretical skills, that also focus on topics covering the changing media landscape such as artificial intelligence, data journalism, mobile journalism, multimedia....



CONCLUSION AND RECOMMENDATIONS

7.1. Conclusion

The Rwanda Media Barometer 2024 shows the status of media development in Rwanda in aspects related to legal and policy framework, media plurality and diversity, the role of media in promoting good governance and democracy, media development and professional capacity as well as access to information.

The findings of this barometer shows that the legal and policy framework is the highest performing indicator while media development and professional capacity is the lowest performing indicator. The barometer also points out the challenges that still affect media sector development and concludes with recommendations for improvement to enable the media play its core roles of professionally educating, informing and entertaining the public. Therefore, in addition to indicator specific recommendations, this study proposes policy recommendations some of which are ongoing while others are new as shown in the table below.

Table 11: RMB 2024 Policy recommendations

RECOMMENDATION	
Ongoing recommendations	Institutions
1. Raise public awareness on digital media literacy	MINICT, RURA, RISA
2. Increase public awareness on the Access to Information Law	RGB
New recommendations	Institutions
1. Create awareness on available incentives to support investments in the media industry	RGB, RDB
2. Strengthen the capacity of media institutions and enhance the professionalism of the media practitioners	RGB, Media Associations, Journalism training institutions, Stakeholders involved in media capacity building
3. Promote an innovative and technology-driven media to respond to the emerging dynamics in the media landscape	MINICT, RGB, Media houses
4. Review the media legal and regulatory framework to reflect the current realities	RGB, RURA, RMC,
5. Streamline the coordination of media sector development to enhance efficiency and effectiveness of media operations	RGB
6. Promote inclusiveness and gender equality in the media sector	RGB, Media Associations, Media houses, MIGEPROF, GMO, NCPD
7. Improve working conditions in the media sector and promote the implementation of the anti-sexual-harassment policy	RGB, MIFOTRA, Media houses, Media associations
8. Promote the proper use of Kinyarwanda in the media	RGB, MINUBUMWE, Media houses



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