



Healthy Media, Vibrant Societies

*How Strengthening the Media Can Boost Development
In Sub-Saharan Africa*

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About The Media Map Project

The Media Map Project is a multi-faceted two-year pilot research collaboration between Internews and The World Bank Institute, funded by the Bill & Melinda Gates Foundation. This report is a product of that research. The findings and conclusions contained within this report are those of the author and do not necessarily reflect the positions or policies of the Bill & Melinda Gates Foundation.

The Media Map Project draws together what we know and precisely defines what we do not know about the relationships between the media sector and economic development and governance. The research also examines donors' roles in supporting the media sector over time and provides an evidence base for their future decision-making about media support. Through research, public events, and the data made available on the project website for public use, the project aims to engage the development sector in greater understanding and exploration of the role of media and information in development. See www.MediaMapResource.org for more information.

About the Author

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Executive Summary

The Media Map Project, a research collaboration between Internews and the World Bank Institute, was created to interrogate the evidence on the connections between media and development, as well as to make global data on the media sector more accessible to researchers, policymakers, and practitioners. We conducted research throughout 2010-2011. Methods included statistical, econometric, desk, and field research. This paper synthesizes various threads of original research from Media Map that focus on the media sector, governance, and development in Sub-Saharan Africa. We pursue three principal lines of inquiry to provide an evidence-based framework for media development policy that bolsters aid effectiveness in Sub-Saharan Africa:

- Part 1 Examines the extent to which the media in Africa is currently furthering governance and development goals;
- Part 2 Identifies the critical points of weakness in the media that prevent it from fulfilling this potential;
- Part 3 Assesses the ways in which donor interventions in support to the media in the Democratic Republic of the Congo (DRC), Kenya, and Mali have or have not helped media to deliver on its promise.

Key findings:

Part 1 – Media and Development

- In the coming decade, most of the fastest growing economies will be African, but the region's progress in improving governance, poverty reduction, and human development lags far behind its economic growth. Governments and donors have largely overlooked the potential of a healthy media sector to boost Africa's development.
- There is already a robust body of research on media and development that uses macro data and finds strong and significant positive correlations between freedom of the press and development; Africa is relatively under-examined in this vein of research.
- Broad-based economic growth and political stability in Africa seem to be strongly connected to the presence of a free press. Free press countries:
 - Are less dependent on foreign aid
 - Provide a better environment for businesses within the country
 - Are more integrated into world financial markets
 - Are more likely to be democratic than countries without a free press, and have much stronger democracies overall
- A free press is associated with higher literacy in Africa, and we found literacy to be a vital factor in maintaining democracy over time, globally. Thus, literacy, a free press, and democracy can create a virtuous cycle that lays the ground for improvements in governance, and in development overall.

- The combination of a free press and greater access to information is associated with greater political stability. Results suggest that a healthy media sector has a causal effect on political stability.

Part 2 – The Development of the Media Sector

- There are a number of critical areas for improving the health of the media sector across Sub-Saharan Africa:
 - Press freedom
 - Business management (at the level of individual firms and of markets) and business models (both traditional and new models should be explored)
 - Professionalization of journalism
 - Access to media, including radio, but especially television, Internet, and fixed and mobile broadband
 - Literacy in general, information literacy, and ICT skills
 - Quality of content (both improving quality and the means to measure it)
- Africans' high interest in the news, as well as the growth of mobile, present potential opportunities to improve development in the region.

Part 3 – Donor Support to Media Development

In the case studies of DRC, Kenya, and Mali, donors could better support the media if they:

- Give up preconceived models and implementation plans; instead, decide where aid goes based on need and country-defined priorities
- Improve diagnostics to help implement priorities identified by beneficiaries
- Foster the commitment of host governments to: 1) accept and support a media sector that may criticize them, 2) respect the rule of law, and 3) tackle corruption
- Be sensitive to the power dynamics between donors and beneficiaries, and model the same behavior that donors demand of local organizations
- Coordinate better amongst themselves
- Strengthen institutional memory of their collective support to the media sector

Conclusion: Summary of Key Recommendations for Media and Development in Sub-Saharan Africa

- Donors need to work directly with governments on improving the health of the media sector.
- Media support is most effective when development priorities are country-driven and processes of implementation are country-specific.
- Donors should support the health of the media sector in and of itself, rather than merely supporting the media as a tool for other development ends.
- Media development would benefit from tighter donor coordination.
- Improving business practices and professionalization of the media sector in Sub-Saharan Africa is key to strengthening media overall.

- All media development initiatives should be linked to other, related development initiatives, and tailored to the country context.
- Tightening the connection between research and aid policy would greatly strengthen the field of media development.
- Improving data collection of the media sector in Africa is critical to supporting the media market and better understanding the sector..
- Freedom of the press matters, but can't be isolated from or solely responsible for other development improvements.
- Access to information matters, and is critically linked to the human right to information and self-determination.
- New democracies should make development of a free press a priority early on if they wish to survive as a democracy.
- Establishing a healthy media sector can be a starting point for achieving political stability in a country.
- Both in terms of research and practice, media development must be approached holistically, as one of several intertwined elements in a country's development.

Introduction: Africa at a Turning Point?

Over the past 10 years, six of the top 10 fastest growing economies in the world were Sub-Saharan African; projections for the coming decade contend that seven out of 10 of the fastest growing economies will be African.¹ Bouncing back after the recent economic crisis, the region is expected to have an average growth of 6% in 2012, an increase over 2011's growth of 5.5%. On the downside, increasing food and fuel prices, drought in some parts of the region, and a more difficult economic recovery in other areas of the world are potential threats to this growth. And while the economic picture is quite encouraging,² the region has made much less progress in improving governance, reducing poverty, and furthering human development. However, the overall pattern of economic growth could signal that the region is on the cusp of a phenomenal transformation in its development.

Critically important to this shift is the international donor community's ongoing commitment to aid effectiveness. Unfortunately, donors have largely overlooked or ineffectively supported one powerful catalyst for effective development in Africa: the media sector. While the donor community has not yet fully recognized its potential, there is a growing realization of the power of media and information to change the world.

*Real reform does not come at the ballot box alone. Through our efforts we must support those basic rights to speak your mind and access information. We will support open access to the Internet, and the right of journalists to be heard – whether it's a big news organization or a lone blogger. In the 21st century, information is power, the truth cannot be hidden, and the legitimacy of governments will ultimately depend on active and informed citizens.*³

President Obama, in his May 2011 speech on the Middle East, declared a remarkable commitment to access to information and freedom of the press. The events of the so-called Arab Spring threw into relief the catalytic potential of traditional and social media to transform countries at lightning speed. Governments both inside and outside the uprisings and citizens across the globe were mesmerized by this seemingly sudden, media-driven revolution. Advocates of media as a force for international development wondered if the world was finally coming to embrace the values that have been driving their work for decades.

With the revolutionary potential of media catching the attention of the world, it is a good time to examine the evidence. Does media matter in Africa?⁴ If so, what is the best way to support its development?

This paper synthesizes original research from The Media Map Project that focuses on the media sector, governance, and development in Sub-Saharan Africa. The Media Map Project, a two-year

¹ Data from the Economist; see http://www.economist.com/blogs/dailychart/2011/01/daily_chart. See Appendix II for a chart detailing how Africa's economic growth tracks against much more modest improvements in human development.

² Regional Economic Outlook: Sub-Saharan Africa. Sustaining the Expansion. October 2011, International Monetary Fund. Report at <http://www.imf.org/external/pubs/ft/reo/2011/afr/eng/sreo1011.htm>, accessed 1/24/12.

³ <http://www.npr.org/2011/05/19/136466323/transcript-obamas-speech-about-the-arab-world>, accessed 1/24/12.

⁴ The Media Map Project defines media in a simple, inclusive way: means of mass communications.

research collaboration between Internews and the World Bank Institute funded by the Bill & Melinda Gates Foundation, was created to interrogate the evidence on the connections between media and development, evaluate the effectiveness of donor interventions supporting the media sector, and make global data on the media sector more accessible to researchers, policymakers, and practitioners. The original research that underlies this paper used statistical, econometric, desk, and field research methodologies, and was conducted throughout 2010-2011. A broader discussion of methodology can be found in Appendix I; see the References section for more information on the underlying research papers and data sources.

In this paper, we set out, first, to determine the extent to which the media in Africa is currently bolstering governance and development goals; second, to identify the critical points of weakness in the media that prevent it from fulfilling this potential; and third, to assess the ways in which donor support of the media has or has not helped media to deliver on its promise.⁵ The three lines of inquiry are meant to provide an evidence-based framework for media development policy that bolsters the effectiveness of aid in Sub-Saharan Africa.

Part One: Does the media in Africa support development?

Global evidence: Press freedom is tied to development

We know, at least generally speaking, that a healthy media sector supports development. Substantial evidence, in the form of econometric and statistical research, shows a strong connection between a free press and both economic development and democracy around the world. Most of this research on media and development uses country-level data and finds strong and significant positive correlations between freedom of the press and different aspects of development. There is also extensive existing theoretical and qualitative literature on the topic;⁶ considered together with the quantitative research as a body of work, the research provides clear and compelling evidence that freedom of the press is a critical ingredient in good governance and economic growth. Even if a free press is not sufficient to drive either on its own, the evidence shows that a free press is certainly necessary for a functioning democracy and can strengthen economic development.

To what extent are these principles currently being played out in Africa? Africa is not only developmentally poor; it is also data-poor and analysis-poor, particularly in issues related to media. There is still a great need to increase our understanding of the relationships between media, development, and governance specific to the region.

⁵ For more information and the original research papers adapted for the present paper, see www.MediaMapResource.org.

⁶ An exhaustive literature review matrix capturing quantitative studies of media and development is available at www.MediaMapResource.org/research-and-resources/. A “Review of Literature” describing the intellectual history of media development, by Amelia Arsenault and Shawn Powers, is also available at the website. A review of publicly available data measuring different aspects of the media sector, together with a more detailed description of key findings of the literature that constitute this body of evidence, can be found in Sanjukta Roy, “Overview Report: Measuring Media Development,” also available on the website.

Press freedom and economic development

There are several features of the media sector that should be measured in order to properly diagnose its health. The critical elements are press freedom, the enabling environment, professionalization, business strength, the reach of different types of media, quality of content, and citizen engagement with information. Because of limitations in available data, this analysis will focus on the extent to which press freedom is associated with development and governance in Africa over time. Without freedom of the press, the other aspects of a vibrant media sector cannot fully develop. However, a free press alone cannot guarantee the health of the media sector (more on this later).

From the outset of our research, we did not expect to find a simple causal relationship between how media systems develop and economic development. The reason that the media can be so powerful is that it is woven throughout society and touches on all other institutions. However, this degree of penetration means that it both impacts and is affected by a complex web of other factors. Our research shows that media is critical to the overall development process; we also find that successful media development is not possible without a supportive enabling environment. The analysis that follows looks at a variety of correlations between press freedom and development that do not necessarily signal causality. It is difficult to completely isolate the media sector from the context in which it develops, and thus impossible to identify pure cause and effect. Indeed, a free press and a healthy media sector may arise along with the improved performance of other institutions, without necessarily being the cause for this improvement. Each country is complex and unique. However, looking at a variety of factors that coexist with a free press, and the striking patterns of these relationships overall, we have found strong evidence that – in contrast to evidence from Asia⁷ – broad-based economic growth and political stability in Africa seem strongly connected to the presence of a free press.

Press freedom in the economies of Sub-Saharan African countries

Our analysis of press freedom, like that of most quantitative macro research on media, employs Freedom House's Freedom of the Press Index.⁸ A comparison of countries rated as having a *free press* with countries rated as having a *not free press* highlights a clear difference associated with press freedom in Sub-Saharan Africa.⁹ Figure 1 depicts the countries that were used in this analysis: countries

⁷ See for example, "Rethinking Media Development," by Mark Nelson with Tara Susman-Peña, on the counter-examples of China and Singapore. Available at www.MediaMapResource.org.

⁸ While there are other indexes that measure press freedom (e.g. Reporters without Borders' World Press Freedom Index), this research follows the conventionally accepted approach. Freedom House is not without its critics. Some criticize it as having a free market bias, because the scoring rewards a commercial media model over other business models (e.g. Burgess, 2010; UN, 2001). Most of Media Map's qualitative researchers argued that the Freedom House data did not accurately represent the on-the-ground reality of press freedom in their case study countries (e.g. Frère, 2011; Gilberds, 2011). However, no other index covers all countries over such a long time period, 1994-2011, using a stable methodology, and is generally considered to be a reasonably reliable measure of press freedom; thus most economists and political scientists that conduct relevant research use the Freedom House index. A summary of all data sources can be found in the references section.

⁹ Because Freedom House's *partly free* rating can mean very close to *not free*, very close to *free*, or truly in the middle, including the mix of countries in the *partly free* range produces mixed results. Thus, for the purposes of clearly illuminating any distinct development outcomes that are linked to press freedom, countries Freedom House rates as having a *partly free press* (in gray in Fig. 1) are excluded from analysis in this paper that compares countries by level of press freedom.

that had a *free press* for at least three years from 2002-2011 are green; countries that had a *not free press* for at least three years from 2002-2011 are red.¹⁰ Despite serious challenges in human development, Sub-Saharan Africa still has a substantial number of countries with a free press. Rather than focusing on economic growth (which as the Introduction argued, does not guarantee development), the analysis in this section will explore the degree to which a free press in Sub-Saharan Africa supports different aspects of economic development.

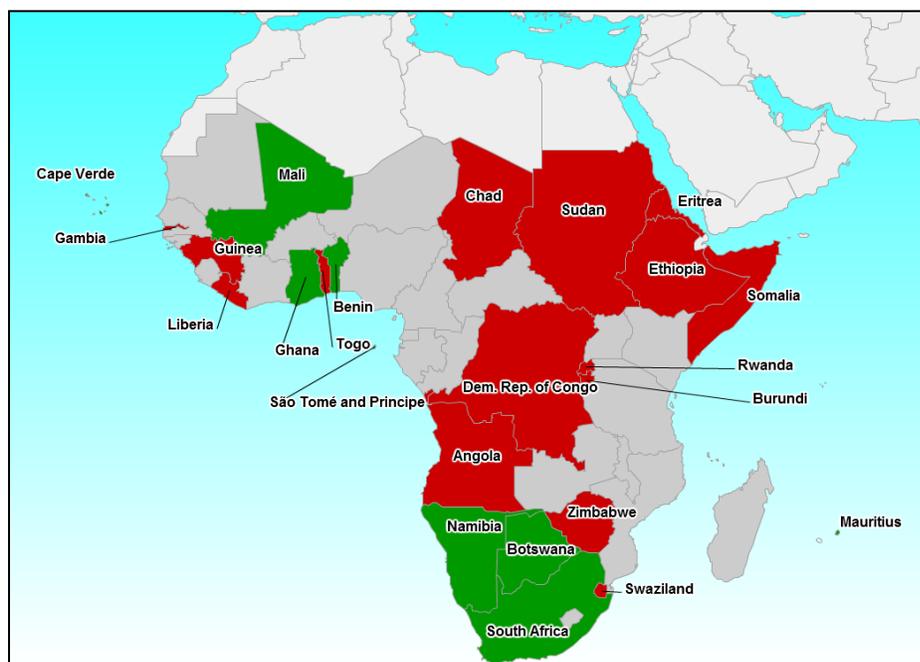


Figure 1 – Free Press and Not Free Press Countries in Sub-Saharan Africa

Dependence on foreign aid

One important sign of the increasing economic stability and growth of a country is a decline in reliance on foreign aid (Official Development Assistance, or ODA). A striking pattern emerges when the importance of ODA to the overall GDP is compared between free press countries and not free press countries in Sub-Saharan Africa (see Figure 2).¹¹ In the not free press African countries over the last decade, foreign aid has been on the rise overall (though falling in the aftermath of the global economic

¹⁰ The analysis that follows compares free press countries to not free press countries in Africa. Countries are defined as either free or not free if they stay that way for at least 3 years within the time period of analysis, indicating durability of press freedom, and providing a basis for credible analysis. The countries that we consider to have a free press according to this definition are: Benin, Botswana, Cape Verde, Ghana, Mali, Mauritius, Namibia, Sao Tome and Principe, South Africa; the countries that we consider as having a not free press are: Angola, Burundi, Chad, Democratic Republic of the Congo, Eritrea, Ethiopia, Gambia, Guinea, Liberia, Rwanda, Somalia, Sudan, Swaziland, Togo, Zimbabwe. Graphic produced by Sanjukta Roy.

¹¹ Data used for Figure 2 is Freedom House Freedom of the Press Index; Net Official Development Assistance Received available at <http://data.worldbank.org/>. Lines graphed show net ODA as a percentage of Gross National Income (GNI); chart produced by Sanjukta Roy.

crisis), while for countries with a free press, foreign aid as a percentage of GDP is significantly lower than for countries lacking one, and has held steady over time.

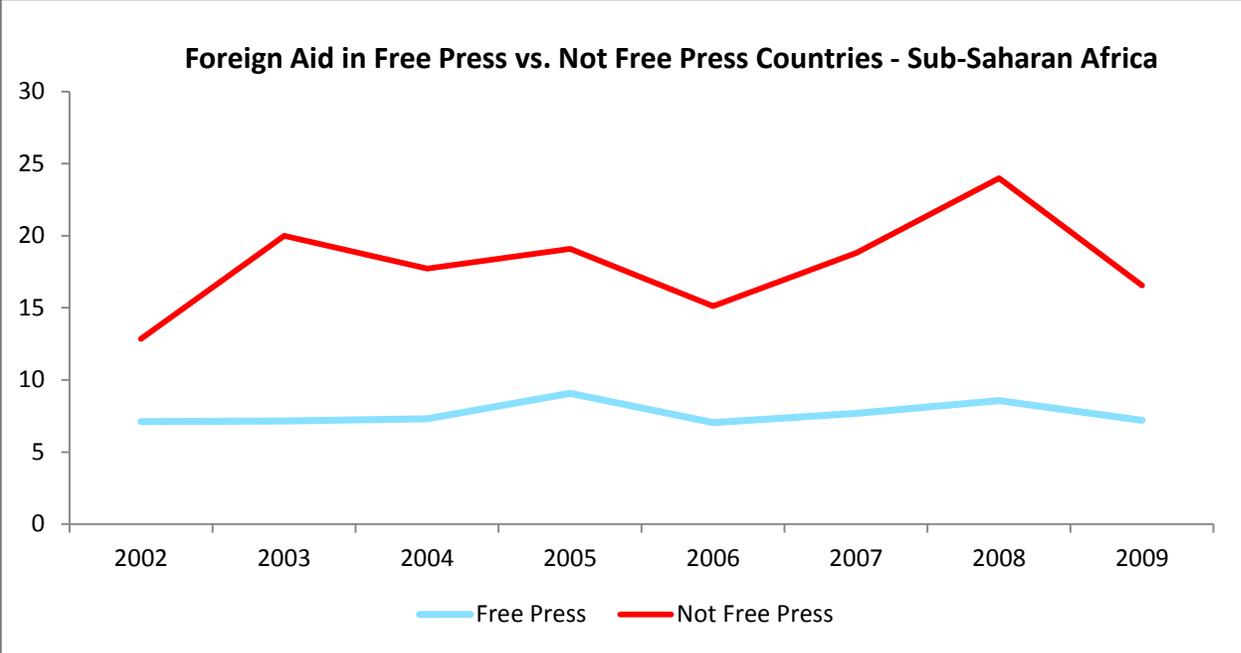


Figure 2

What a free press means for business

A business-friendly environment is another indicator of good prospects for further economic development. An analysis of various measures of the business environment in Africa reveals that free press countries are much more conducive to business than not free press countries. This is likely due, at least in part, to the fact that a free press can reveal detrimental government interference in business, and because free flows of information about business and business regulation support a strong market economy. The discouraging atmosphere for business is clearly visible in the not free press country of DRC. In DRC, many of the basic systems for business do not exist at all. While this applies to all types of businesses, it is evident in the media business itself. Most Congolese media cannot even be labeled “businesses” or “companies,” as they generally do not conform to accepted standards of administration, taxation requirements, or corporate organization.

Entrepreneurship is less financially risky in free press countries, both at the launch and in the event of a closedown of business. The cost of starting a business is significantly less in free press countries (similar to that of high-growth economies) than in not free press countries and in Sub-Saharan Africa as a whole. In addition, free press countries suffered much less impact on the cost of starting a

business from the global economic downturn than either not free press countries or the region as a whole (see Figure 3).¹²

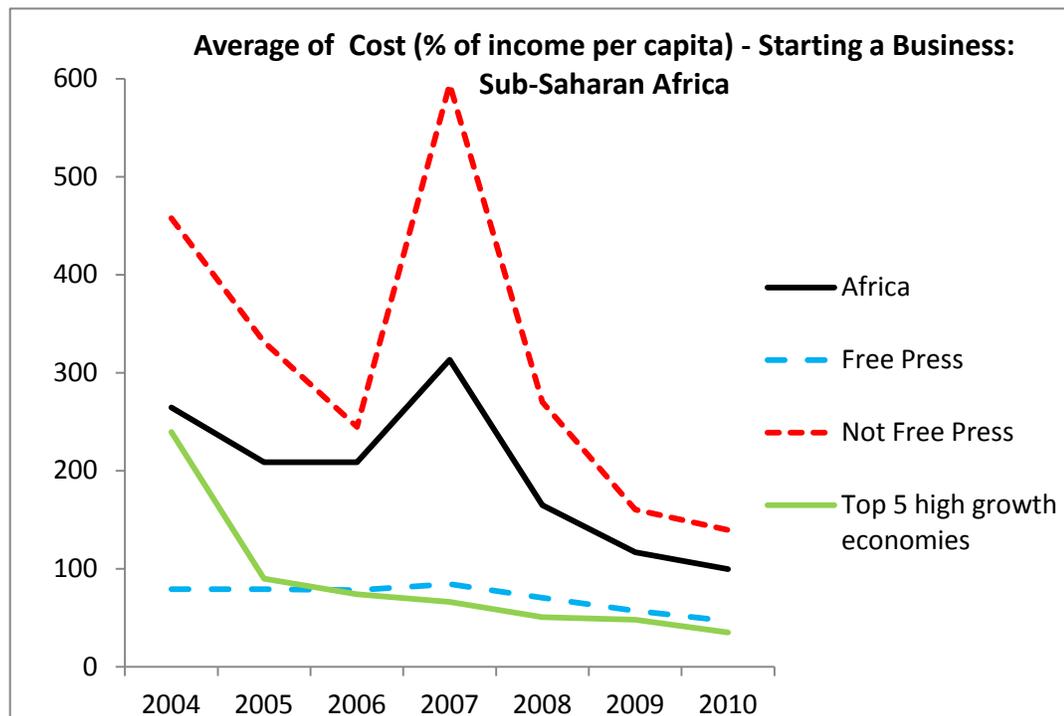


Figure 3

Not only is it cheaper, it is also less financially risky to start a business in countries with a free press, as losses after closing a business are lower. Recovery rates after closing a business (defined as cents on the dollar recouped by creditors through bankruptcy or insolvency proceedings) are highest in free press economies (even more than in high-growth economies, which also show more fluctuation). Whether because a more developed business sector has an impact on media freedom or vice versa, by contrast, recovery rates are the lowest in countries with a not free press (see Figure 4).¹³

¹² Press Freedom scores from Freedom House; data on cost of starting a business from the IFC/World Bank Doing Business report, available at <http://www.doingbusiness.org/>. Chart produced by Sanjukta Roy.

¹³ Press Freedom scores from Freedom House; data on recovery rate of closing a business from the IFC/World Bank Doing Business report, available at <http://www.doingbusiness.org/>. Chart produced by Sanjukta Roy.

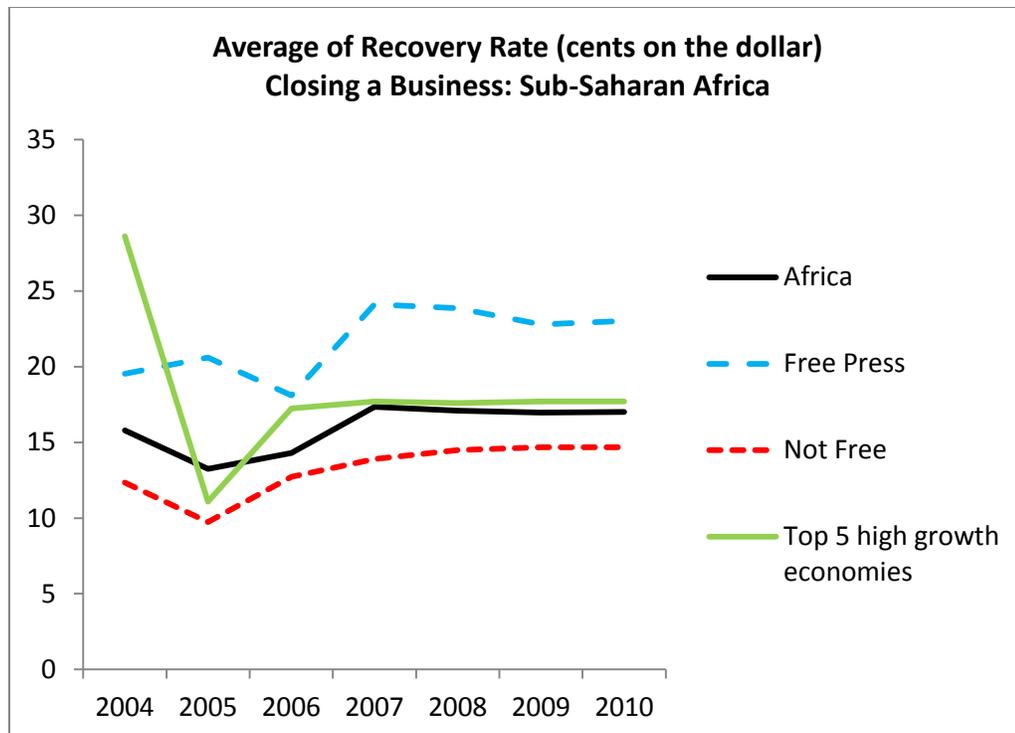


Figure 4

Further, labor and contractual regulations in countries with a free press create a more favorable business environment. Free press countries have stronger regulations than even high-growth economies, making it more difficult to hire workers. While this can be a burden to employers, it signifies that better legislation is in place to protect the employment system. Also, enforcing contracts in countries with a not free press is costlier. This makes contract enforcement less likely and business relationships overall more informal, leaving all parties' rights vulnerable in business relationships.¹⁴

In addition to providing an improved business environment within the country, free press countries participate more actively in international business. Capital moves more freely in free press countries than in not free press countries or in the region as a whole (see Figure 5).¹⁵ These data measure the extent of restrictions on cross-border financial transactions. Countries with freely moving capital are more integrated into world financial markets. Free press countries in Africa still impose more restrictions than the world overall, but are noticeably more globalized than not free press countries. Again, this analysis identifies interesting relationships, and points to free press countries as clearly indications of a more developed system, but does not account for the causes of these relationships.

¹⁴ Findings summarized from analysis by Sanjukta Roy of Freedom House Press Freedom scores; data on difficulty in hiring workers and cost of contract enforcement from the IFC/World Bank Doing Business report, available at <http://www.doingbusiness.org/>.

¹⁵ Press Freedom scores from Freedom House; data on capital account openness from the Chinn-Ito Index, available at http://web.pdx.edu/~ito/Chinn-Ito_website.htm. Scores for the Chinn-Ito index range from -1.84 to 2.48; higher numbers are better; see the website for information on how the index is constructed. Chart produced by Sanjukta Roy.

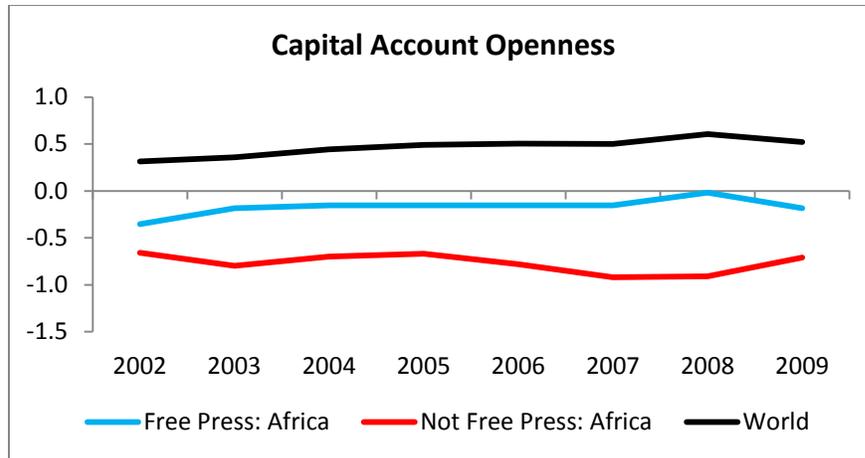


Figure 5

To summarize, a free press is associated with several critical measures of the economic development we have seen in recent years in Sub-Saharan Africa. Free press countries are less dependent on foreign aid, have a more supportive environment for businesses within the country, and are more integrated into world financial markets. While this kind of data and analysis does not reveal the causes of these economic trends, these positive findings may also be linked to the tendency of free press countries to have healthier political systems and become more politically stable, as we will see below. The next section reveals that a free press is also associated with a number of indicators that are critical to good governance.

Democracy and governance

Media and political systems: Global findings and their implications for Africa

While there has been less progress in governance than in economic growth, over the last two decades Sub-Saharan Africa has seen a steady decline in the number of autocracies and a steady increase in the number of democracies. There is also a growing number of countries with mixed systems, or anocracies¹⁶ (see Figure 6).

¹⁶ The third category, anocracies, is a catchall category that includes much variety. In theory, these countries are transitioning, but in fact they may sustain themselves as a mixed system for a long time, and may not necessarily be on the way to democracy. See <http://www.systemicpeace.org/polity/polity4.htm> for information on data, definitions, and the Polity IV database, which Michael Behrman used to produce Figures 6 and 7. Polity IV is a long-term research project that codes the country governance characteristics for comparative, quantitative analysis. Polity IV defines “durability” of a political system as one that maintains the same type of system over time.

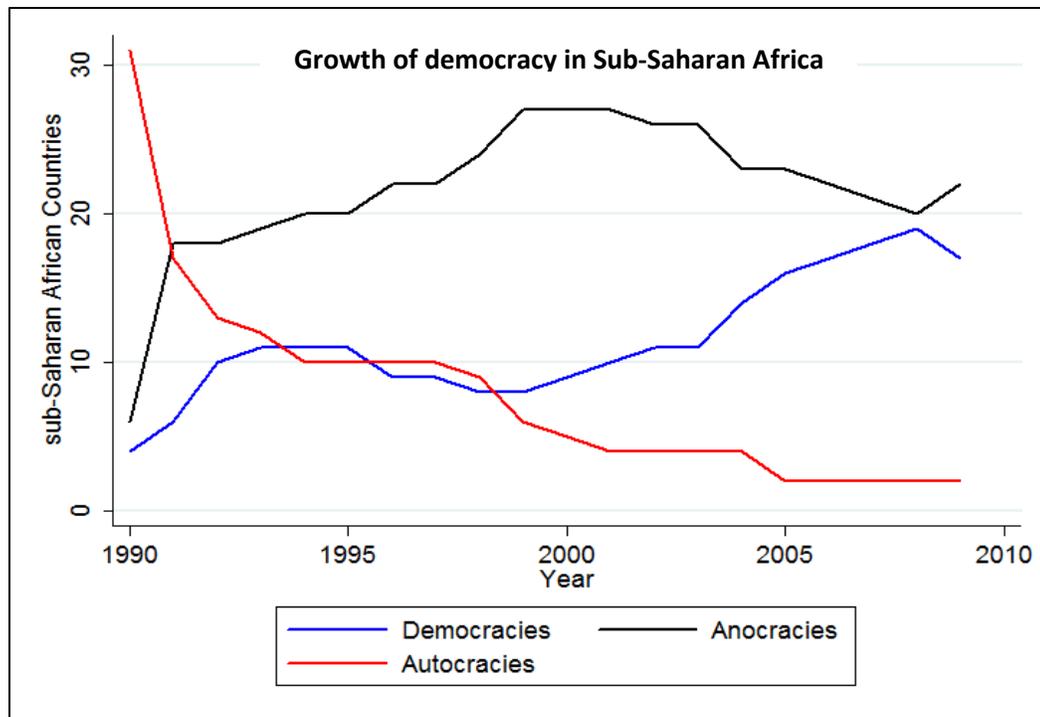


Figure 6

Countries in the region seem to be evolving toward democracy, which by definition means they have made significant progress in the realm of electoral politics. Having a democratic form of government does not necessarily mean that these countries are governing well, as we will see below. However, maintaining a democratic system over time (having a “durable” democracy) certainly increases the opportunities for improving governance. So the question is: Does a free press bear any relation to the durability of a democratic system?

Using Freedom House and Polity IV data, the scatter plot below demonstrates that worldwide, durable democracies have a free press; new democracies do not always have a free press; and autocracies do not have a free press (see Figure 7). While this analysis finds that stable democracies have a working free press, there is no predictive relationship between the two; in other words, a country can become a democracy without having a free press. However, results show that if a new democracy does not develop a free press, it will soon backslide away from a democratic system. Thus, one of the ways to ensure the durability of new democracies in Africa is to focus on freedom of the press.

In Mali, for example, wide-scale decentralization of social institutions occurred in the 1990s as the country underwent a transition to democracy. Devolution of governmental control of Mali’s media and communications networks occurred at the same time, and the 1992 constitution guarantees freedom of the press and freedom of speech. Mali’s commitment to press freedom and pluralism when the country was a young democracy was clearly important to Mali’s successful democratization and the durability of its democracy.

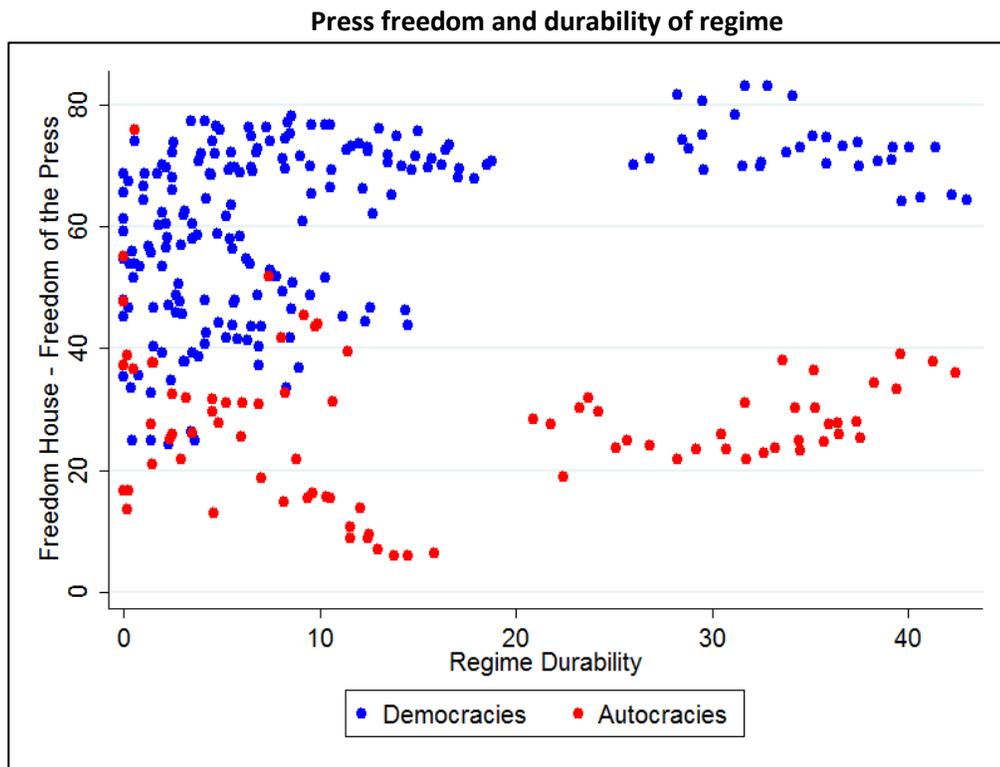


Figure 7

As might be expected, experienced governments tend to enjoy better governance: older democracies govern well, while young democracies do not. The analysis also reveals that literacy (including education) is an important factor, together with urbanization, in maintaining democracies over time.¹⁷ The finding about literacy’s relationship to democracy also parallels other evidence that a free press is associated with literacy: In free press countries, the literacy rate is higher than that in not free press countries, and the literacy rate for free press countries has grown significantly over the last decade.¹⁸

Thus, these findings suggest that literacy, a free press, and a democratic political system can create a virtuous cycle that lays the ground for improvements in governance, and thus development overall. It is important to be broadly inclusive when considering the “enabling environment” for media, which in turn supports good governance – a more literate public, which by implication is also better

¹⁷ Michael Behrman performed a panel fixed effect regression that controlled for government effectiveness, regulatory quality, rule of law, and corruption (all using World Bank Worldwide Governance Indicators as proxies), together with press freedom (Freedom House), urbanization (World Bank World Development Indicators), fuel exports as a per cent of merchandise exports (World Bank), and GDP.

¹⁸ Findings summarized from analysis by Sanjukta Roy. The literacy rate for free press countries was 60% in 2002; by 2009, it had risen to 77%. UNESCO Institute for Statistics, see: <http://stats.uis.unesco.org/unesco/TableViewer/tableView.aspx?ReportId=210>

equipped to make good decisions with the information that they get from the media, promotes more durable democracies. While literacy and a free press are not the only factors important to democracy, the correlation suggests that democracy initiatives focusing on freedom of the press should also seek to strengthen literacy, and vice versa.

Media and governance in Africa

Overall, governance indicators for the Sub-Saharan Africa region show dismal progress over the last decade. The rule of law, while marginally better than a decade ago, is still measured in the negative numbers and has seen unstable progress. Similarly, the measure for political stability and the absence of violence shows no improvement over the decade, with average scores for the region in the negative numbers. Comparing the free press countries to not free press countries, however, there is a notable difference. In contrast to not free press countries’ tendency towards autocracy (in line with the global findings, above), free press countries are not only more likely to be democratic, they have much stronger democracies overall. The measure of democratic strength¹⁹ is positive, significantly higher, and has improved over time for free press countries, whereas the score for not free press countries, while also improving, is still negative (see Figure 8).

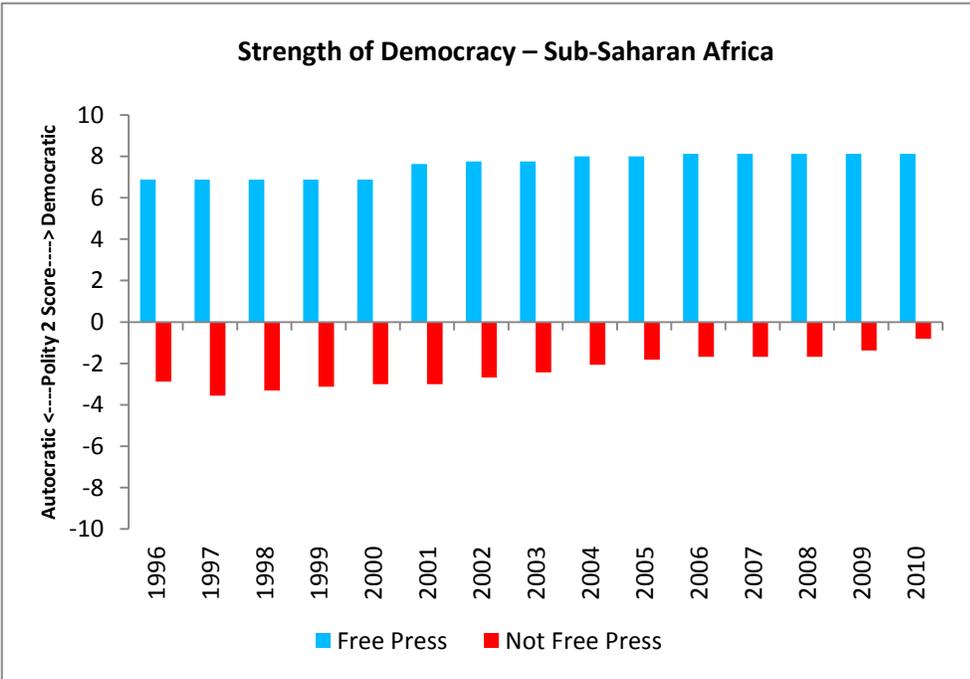


Figure 8

¹⁹ What we are calling “democratic strength” is the Polity 2 scores, which are composed of a country’s democracy score minus its autocracy score. The scores range from -10 to +10; the higher the score, the more democratic the country. Source: Polity IV database. Chart produced by Sanjukta Roy.

Even though the scores are only marginally positive, free press countries still have better rule of law than not free press countries, which have negative scores (see Figure 9).²⁰ DRC is again a relevant negative illustration, as there is no proper rule of law in that not free press country. Congo is very unstable, has no independent judiciary, and relies heavily on international NGOs to provide many of the basic functions that state institutions are usually expected to provide.

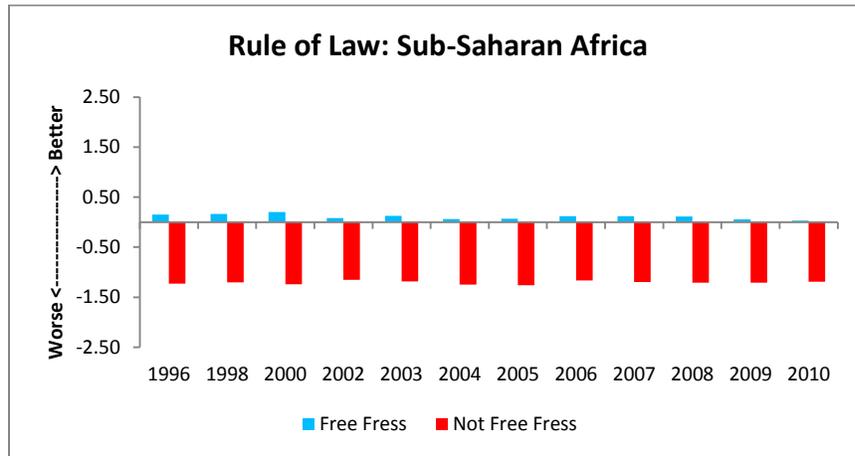


Figure 9

Similarly, and more strikingly, free press countries do notably better in the area of political stability and the absence of violence (Figure 10).²¹

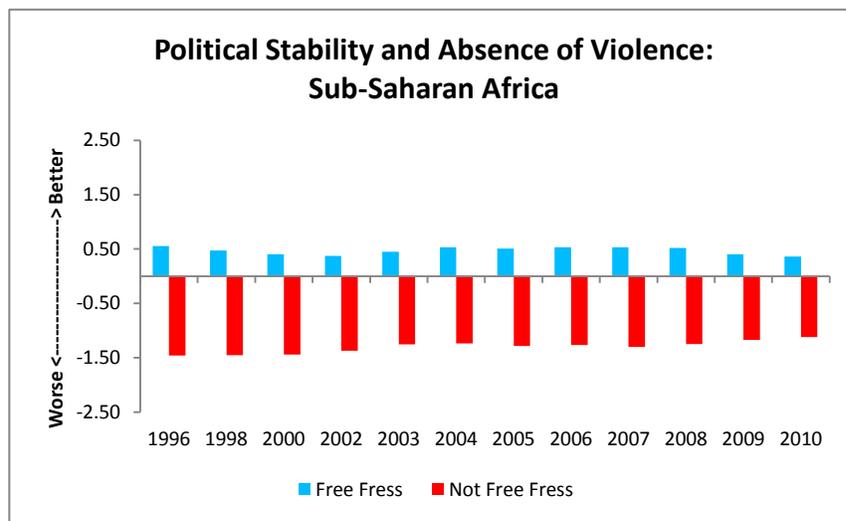


Figure 10

²⁰ Scores, from the World Bank Worldwide Governance Indicators, range from -2.5 to +2.5. Higher scores are better. See <http://info.worldbank.org/governance/wgi/index.asp>. Chart produced by Sanjukta Roy.

²¹ Scores, from the World Bank Worldwide Governance Indicators, range from -2.5 to +2.5. Higher scores mean more political stability and less violence. See <http://info.worldbank.org/governance/wgi/index.asp>. Chart produced by Sanjukta Roy.

Similarly, countries in Africa with a free press show significantly higher democratic accountability than countries with a not free press (Figure 11). Democratic accountability is defined here as how responsive government is to its people. In principle, the less responsive a government is, the more likely it is to fall—peacefully in a democratic society, but possibly violently in a non-democratic society.²² Countries with a free press are better able to provide the information about government activities and decisions that enable citizens to hold their governments to account. In one instance in Mali in early 2010, wide-scale reporting of the corruption and embezzlement of foreign funds by the then-Minister of Health led to his resignation and to international pressure for greater accountability.

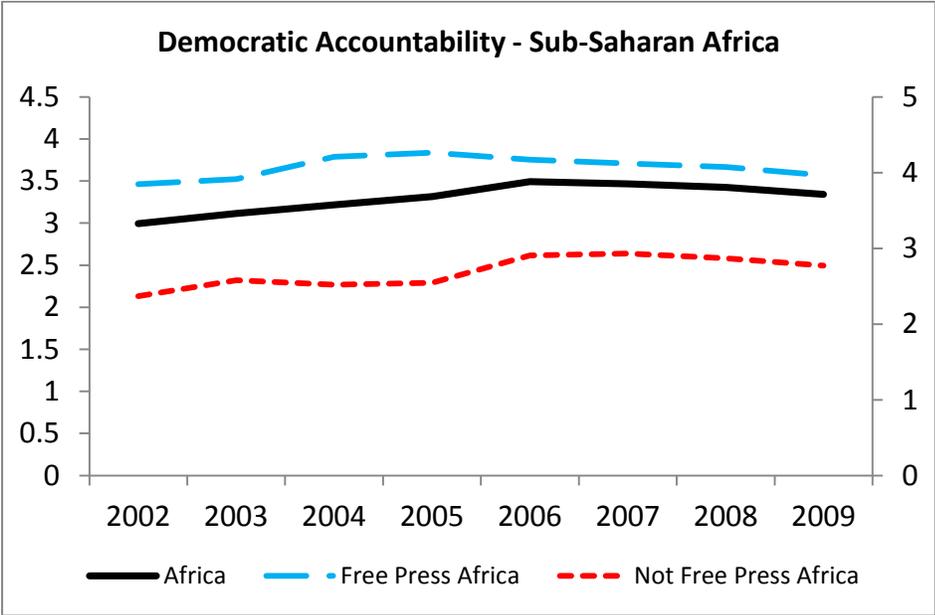


Figure 11

As one might expect when a country’s press is free to hold the government accountable for its actions, free press countries also experience less corruption. Not free press countries have markedly worse scores²³ (see Figure 12). In DRC, the overall context is one of widely reported corruption, bribery, and embezzlement of funds. Transparency International identifies DRC as is among the worst offenders worldwide; such endemic corruption has an impact on all sectors.²⁴

²² Data source: PRS International Country Risk Guide (ICRG) Database. Index runs from 0 to 6; higher scores are better. See <http://www.prsgroup.com/ICRG.aspx>. Chart produced by Sanjukta Roy.

²³ From the Worldwide Governance Indicators Corruption Index. Higher scores are better. See: <http://info.worldbank.org/governance/wgi/index.asp>

²⁴ See: http://www.transparency.org/policy_research/nis/nis_reports_by_country

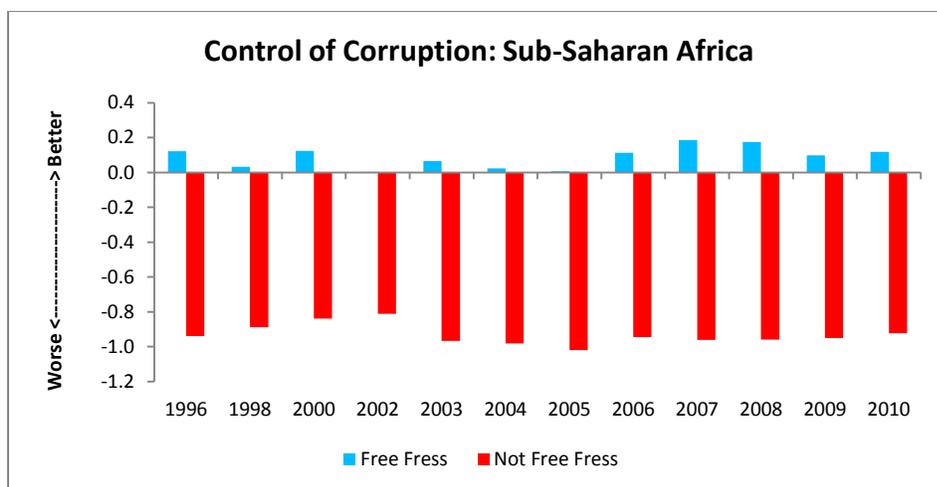


Figure 12

To summarize the last two sections, in general, African countries with a free press are more likely to have democratic political systems, enjoy better governance, are better integrated in global markets, offer better conditions for business within the country, and are less dependent on foreign aid than not free press countries. All of these factors are indications of better institutions²⁵.

Thus, despite the dismal picture when looking at Sub-Saharan Africa as a whole, **there is clear evidence that a free press, better development, and better governance are all linked**. This analysis takes a new look at Africa, and finds that in many ways, press freedom supports development. The data show general trends linking free press countries to stronger institutions, accountability, and overall governance. We can speculate that a free press and development reinforce each other, but more work needs to be done prove these relationships and more closely identify the sequencing. Further, it will be important to broaden the analysis to focus on relationships among other aspects of the health of the media system and development; we have been limited in our analysis in large part because of insufficient data. However, before turning to the question of what African media sectors need to help support the development of the region, we feature the findings of a promising study that shows how press freedom, together with access to information, appears to have a causal effect on political stability.

Press freedom, access to information, and political stability in Africa

As argued earlier, in order to assess the impact of a healthy media sector on aspects of development, it is important to examine more than just press freedom. In a rigorous econometric study, Sanjukta Roy examined the extent to which the interplay of a free media and greater access to information impacted on the political stability and the absence of violence in Sub-Saharan African countries between 1994-2009. Her work produced economically and statistically significant results that suggest that free media and greater access to information are associated with greater political

²⁵ The importance of institutions is widely accepted in the economic literature. North in his seminal paper "Institutions" (1991) emphasizes that institutions, formal and informal, are key to the performance of economies. Institutions define the functioning and the incentive structure in an economy, which in turn shapes the direction of economic change towards growth, stagnation, or decline.

stability.²⁶ In fact, free media and better access together are more closely associated with improving political stability for countries with high political risk factors than for more stable countries. Most importantly for understanding how best to support governance and development, the results suggest that a healthy media sector has a causal effect on political stability.

These findings, as they are based on an econometric analysis of the group of Sub-Saharan African countries together, using quantitative measurements of political situations and media, cannot account for *why* or *how* healthy media seems to have a causal effect on political stability. In Kenya, ethnically based local radio had a role in inciting the 2007-08 post-election violence. When we presented these results at a forum on media and governance in Nairobi in 2011, Kenyan stakeholders were both very interested and quite skeptical that a free press fosters political stability. The kind of content that the media produces is clearly critical to the issue of stability, and we must be careful not to equate a free press with being freely able to broadcast lies or incite violence. Further, the econometric research does not imply that every country with a free press will become more stable. Nonetheless, the findings strongly suggest that two important aspects of a healthy media sector – press freedom and information access – deserve special attention when countries are trying to become politically stable.

Part Two: What prevents the media in Africa from fulfilling its potential to support development?

The health of the media sector

After examining the considerable new evidence that healthier media sectors are contributing to both better economic development and better governance in Africa, we turn now to focus on the health of the media sector in Africa itself. What are the areas that, by their deficiencies, are potentially impeding development in Africa? How has the media sector across Africa developed over time? What are the key challenges that prevent it from fulfilling its potential to support development?

The key elements of a healthy media sector assessed in this section include: press freedom, the enabling environment, plurality of news sources, professionalization of the sector, business management, access to information, engagement with information, and quality of content.²⁷

A. Press Freedom

Progress towards freedom of the press in Africa, as in the world overall, appears to be a flat line (see Figure 13). From 1990 to 2011, there were some almost imperceptible improvements in the level of press freedom in Sub-Saharan Africa, with a greater proportion of countries shifting from not free to the

²⁶ This analysis employed ordinary least square method, two-way fixed effect model, quantile regression analysis and dynamic panel estimation (seeking to rule out reverse causality). For the full report, see Sanjukta Roy, “Media Development and Political Stability: An Analysis of Sub-Saharan Africa” at <http://www.mediamapresource.org/research-and-resources/>. A list of data sources for this research can be found in the References section.

²⁷ The IREX MSI, which does the most complete job of all of the data on media of evaluating media sectors as systems, and not by just one dimension, evaluates most of these areas, except for access to information and engagement with information. The MSI scores 37 Sub-Saharan African countries over three years. Its limited number of years meant that we could not use the MSI for the analysis in Part One of this paper.

partly free range. While this movement is in the right direction, it is not significant enough to strongly impact the overall picture. There is still much work to be done. Sub-Saharan Africa performs similarly to low- and low-middle-income countries as a whole, and both groups fare significantly worse than the world overall (Figure 13).²⁸ Recalling the analysis from the last section, African countries that have a free press are also generally associated with better economic development and governance. So it is important for Sub-Saharan African countries to move more strongly towards a free press.

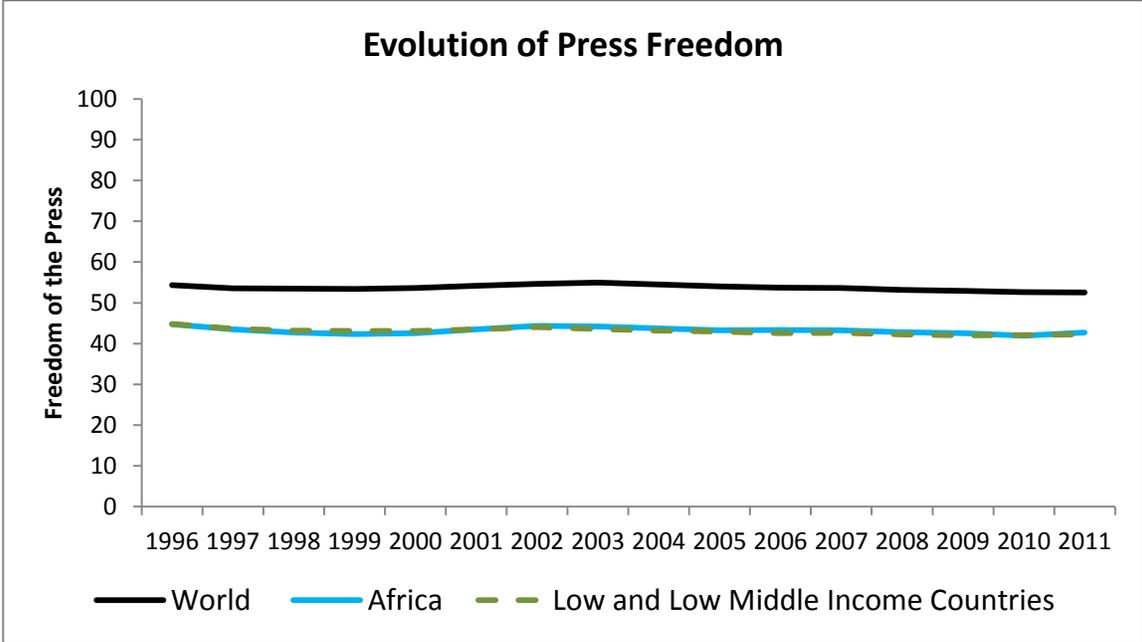


Figure 13

B. The media as a system: Supporting institutions, plurality of news sources, professionalization of the sector, business management, freedom of speech

To measure various components of the health of the media sector in Sub-Saharan Africa over time, we turn first to IREX’s Media Sustainability Index (MSI). This index looks at the media sector more holistically than Freedom House, and measures what it defines as five “pillars” of a sustainable and strong media sector: 1) Freedom of speech; 2) Professionalization; 3) Plurality of News Sources; 4) Business Management; and 5) Supporting Institutions. For this analysis, we look at all of the Sub-Saharan African countries as a group. The MSI has three years of data available for this region: 2006/7, 2008, and 2009. The average for Africa of the overall country scores starts at 1.92 in 2006/7, then dips slightly to 1.89 in 2008 and remains there for 2009, all in the high end of “unsustainable/anti-free press.” In all five

²⁸ Data from Freedom House Freedom of the Press Index. Freedom House scales its ratings from 0 (best) to 100 (worst). We have rescaled the scores for the graphs in this report so that 0 is worst and 100 is best, to make the graphs more intuitively understandable. Low and Low Middle income categories were created using World Bank classifications. For more information, see: <http://data.worldbank.org/about/country-classifications>. Chart produced by Sanjukta Roy.

subcategories, an insignificant percentage of the African countries reaches “sustainable, professional, and free” in any year.²⁹

So a first look reveals that media systems across Africa are, on average, rated as unsustainable. A closer look reveals more nuances regarding the particular points of weakness within the different areas that MSI measures. Close to or slightly more than half of the countries are at “near sustainability” in MSI’s 4-point scale for Freedom of Speech, Plurality of News Sources, and Supporting Institutions. Professional Journalism fares worse, hovering at 37.5% in 2009. Mali does not have even one university level journalism school. “The media [in Mali] has a low level of professionalization. Those who have a professional degree were trained in Dakar. We see lots of factually incorrect stories, made-up stories, and sensationalism This is true about all topics,”³⁰ says one development professional.

Even more dismal are the Business Management scores for Sub-Saharan Africa. In 2009, only 30% of Sub-Saharan African countries scored “near sustainability” in Business Management. So while all of MSI’s sub-scores are critical to a sustainable media sector, Business Management and Professional Journalism particularly cry out for attention (see Figure 14).³¹ It is worth noting that Business Management is the only category that made a slight gain in 2009, while scores in all other categories backslid. With low circulations and a limited advertising market, many newspapers in DRC survive thanks to “obscure” financing, which impacts seriously on their credibility. Very often, newspapers in the provinces publish an issue only when they have found a “sponsor” to support it. Many newspapers are in the hands of a single person, who seeks freelance journalists when the necessary resources to publish on a specific issue have been collected.

²⁹ In three categories for 2006/7, 5.4 per cent of the countries reach the highest score, “sustainable”; for other categories and years, not more than 2.5 per cent reach this desired level. The MSI methodology scores each pillar on a 4-point scale, and then gives a combined score for each country. 1 is unsustainable/anti-free press; 2 is unsustainable/mixed system; 3 is near sustainable; and 4 is sustainable. The full names of each of the sub-indicators are: Legal and social norms protect and promote free speech and access to public information; 2) Journalism meets professional standards of quality; 3) Multiple news sources provide citizens with reliable, objective news; 4) Media are well-managed enterprises, allowing editorial independence; 5) Supporting institutions function in the professional interests of independent media. See <http://www.irex.org/project/media-sustainability-index-msi-africa> for more information.

³⁰ Kate Kaetzer-Hodson, U.S. Embassy, Bamako, Personal Communication, February, 2011

³¹ See Media Sustainability Index, <http://www.irex.org/project/media-sustainability-index-msi>. Chart produced by Sanjukta Roy.

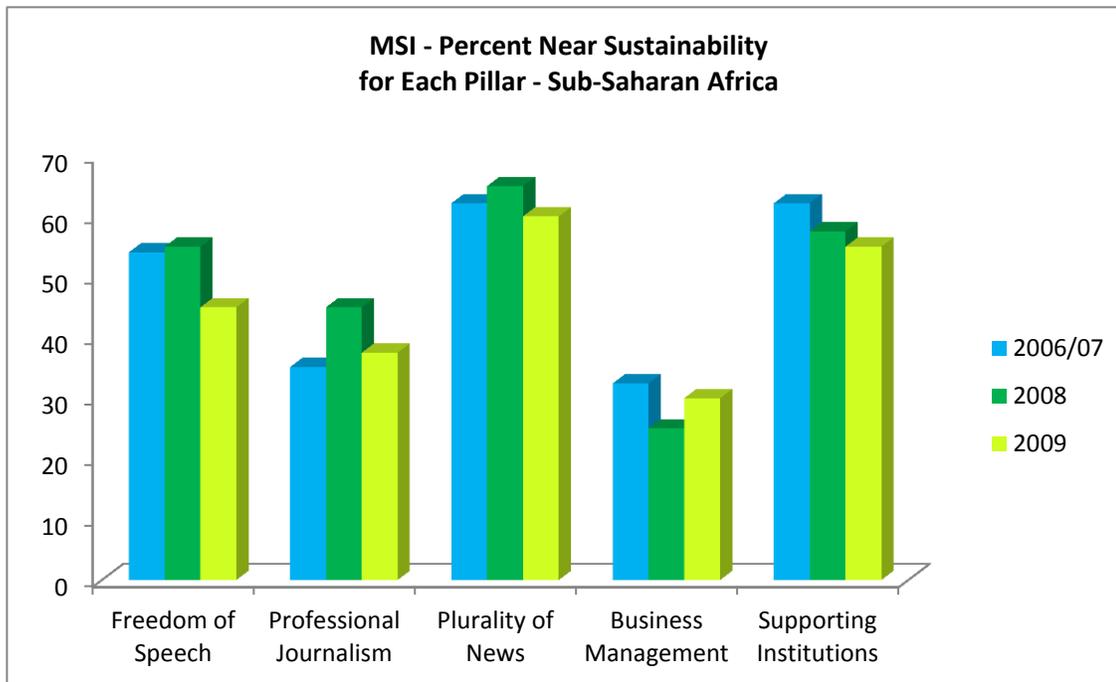


Figure 14

Despite minimal gains, Business Management still ranks far below all the other pillars of media in Sub-Saharan Africa. While increasing the health of the media sector will require strengthening each pillar of the MSI, based on this analysis, special attention should be paid to both professionalizing the sector and strengthening its business management.

In such a context, what does freedom of the media mean? It is the freedom for the managers and owners of media outlets to publish what will bring them some money or what suits them and their friends? There cannot be any press freedom in the DRC if we do not solve the problem of the economic sustainability of media companies.

— Tshivis Tshivuadi, executive secretary of Journalist in Danger, a local DRC NGO defending freedom of the press. From Marie-Soleil Frère, “Democratic Republic of the Congo Case Study,” 2011.

C. Focus on business management: The advertising market

In the long run, a financially sustainable media sector is essential so that media does not become either overly dependent on foreign aid, or beholden to government, political, or private interests. This requires not only that individual media companies are managed well as businesses, but also that the market system functions effectively.

What do other data tell us about the state of media markets in Africa? Business data on African media markets is hard to come by, as it is neither collected regularly over time, nor across all countries. The level of professionalism of market data collection in Africa also varies and is often lacking. However, we were able to obtain and analyze reliable data from 2006 and 2009 that paint a picture of the top 15 advertising markets in Sub-Saharan Africa. In classical business models for media, the shape of the advertising market is the best indicator of the overall sustainability of the market. While the U.S. and some other Western markets have been upended by the rise of new media, the state of advertising in media markets is still an important indicator of market strength.

We looked at average annual growth rates in advertising expenditure. South Africa (at 225.5%) and Nigeria (62.3%) experienced by far the highest average growth rates, completely out of scale with other countries' growth. Six countries of the top fifteen actually had negative growth rates between 2006 and 2009. Thus the data suggest that even the best African markets are unstable. (See Figure 15: dark green countries show exceptional growth, light green countries show good positive growth, red countries show negative growth).³² Liberalization in Africa seems to have a huge impact in growing the media in Africa, but as with the economy in general, growth alone does not mean that the sector is strong and balanced. Despite this apparent instability, "liberalization is an essential first step towards creating a more diverse media in terms of who has access to media, wider ownership and the generation of essential journalistic and business skills."³³

In terms of what businesses are most responsible for this expenditure, "In almost every country where advertising expenditure data is produced (based on rate card), the mobile operators are in the top 3-5 positions. Arguably, the mobile operator advertising has played a significant part in fueling media growth, particularly in broadcasting. The rest are fairly predictable including consumer goods, cars and financial services. In the more developed countries, the list of ad spenders is a long one, in other countries it peters out after the Top 10 or 15."³⁴ The advertising market in Mali (which is not one of the top markets) is more limited: it is dominated by the state and two large telecommunications companies and largely controlled by the Malian Agency of Press and Publicity. In most African media markets, because of underdeveloped audience research capacity, advertising rates are not based on audience measurement but rather on media managers' perceptions of the market, personal relationships, and other informal, subjective criteria. In Kenya, international audience research companies like Synovate and InterMedia conduct high quality research, but media companies – guided more often by political motivations than by business logic – still do not necessarily use it to guide business decisions.

³² Source: Balancing Act. See <http://www.balancingact-africa.com/>. Graphic produced by Sanjukta Roy.

³³ Russell Southwood, Balancing Act, personal communication, January 6, 2012.

³⁴ Russell Southwood, Balancing Act, personal communication, January 6, 2012.

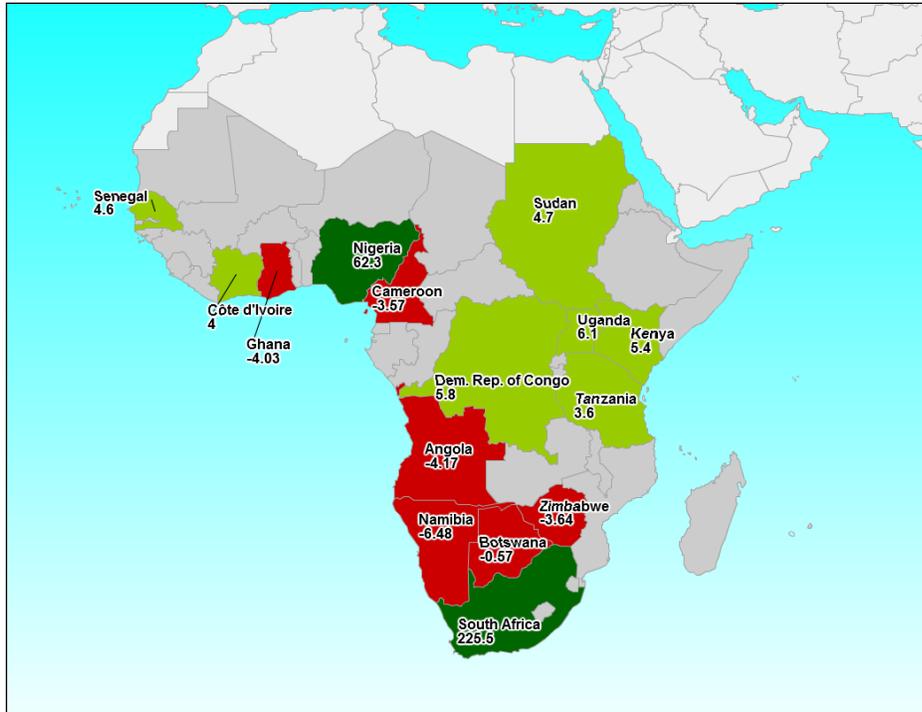


Figure 15: Top Media Markets in Sub-Saharan Africa
Colors show exceptional, positive, and negative growth.

D. Access to and use of media in Africa

Another critical aspect contributing to the health of the media sector is citizens' access to media. It does not matter if the media sector is free and if quality content is produced unless citizens have access to, and engage with, that content. There is some publicly available data on media access; however, it has limitations. For example, the World Bank World Development Indicators database provides data on percentage of households with a radio, Internet users (per 100 people), fixed Internet subscribers (per 100 people), and mobile subscribers (per 100 people). The lack of data on newspaper and television penetration means that it is possible to construct neither a meaningful description nor a comparison between the region and the world for these two media. Further, even with the existing data, much detail is missing that would help refine understanding of media use. There is no demographic information on users or subscribers, and no information about *how* they use the Internet. Information on households with a radio does not reveal who is listening, where, when, and to what. While commercial audience research should provide the answers to many of these questions, we were unable to find any research of this type for Africa that fulfilled the requirements of being reliable, consistent across multiple countries, and collected over time. Nonetheless, an analysis of these statistics does provide a proxy for the state of access to media in Sub-Saharan Africa.³⁵

³⁵ These first three measures were proxies used by Sanjukta Roy in her analysis of press freedom, media access, and political stability, highlighted above.

Radio is a medium of longstanding importance in Africa because of the strength of oral traditions, high illiteracy rates, and its relative inexpensiveness. A look at how radio ownership develops over time confirms this observation. The data show a fairly steady increase in households owning a radio, from 54% of homes in 1990 to over 68% in 2009 (see Figure 16).³⁶ Considering that radio is the most relevant media, the region still has a long way to go to achieve comprehensive coverage.

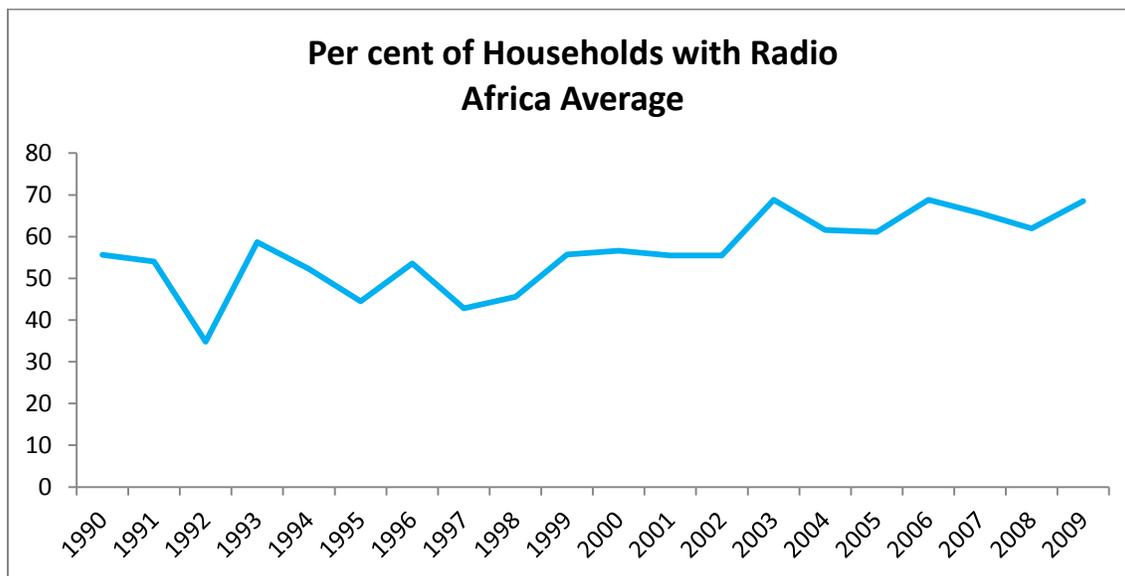


Figure 16

The data on Internet access show that Sub-Saharan African lags notably behind the rest of the world. In terms of number of people who use the Internet, the region showed stagnation until the early 2000s when the numbers began to increase, but as of 2009 the gap between Africa and the world overall was still extreme (Figure 17). Even more striking is the disparity between the number of fixed broadband subscribers in the world overall, which has been climbing steadily since the early 2000s, versus the number for Africa, which still hovers around zero for reasons of poverty and lack of infrastructure (Figure 18).³⁷ Clearly, access to the Internet is a vital area for improvement: it also presents greater challenges, given that Internet development requires infrastructure, literacy, and skills that will take a longer time to have an impact than radio.

³⁶ For households owning a radio, the data are quite spotty. Before 2000, most years only show data for about 5 countries; afterward, most years show data for about 10 countries. These data are not collected globally, and thus a comparison to how this develops in Africa to the rest of the world is not possible. Despite these challenges, an overall pattern of slow growth is clear.

Data source: World Bank Africa Development Indicators Database, see <http://data.worldbank.org/data-catalog/africa-development-indicators>. Chart produced by Sankalpa Dashrath.

³⁷ Data source for Figures 17 and 18 is World Bank World Development Indicators, see <http://data.worldbank.org/>. Charts produced by Sankalpa Dashrath.

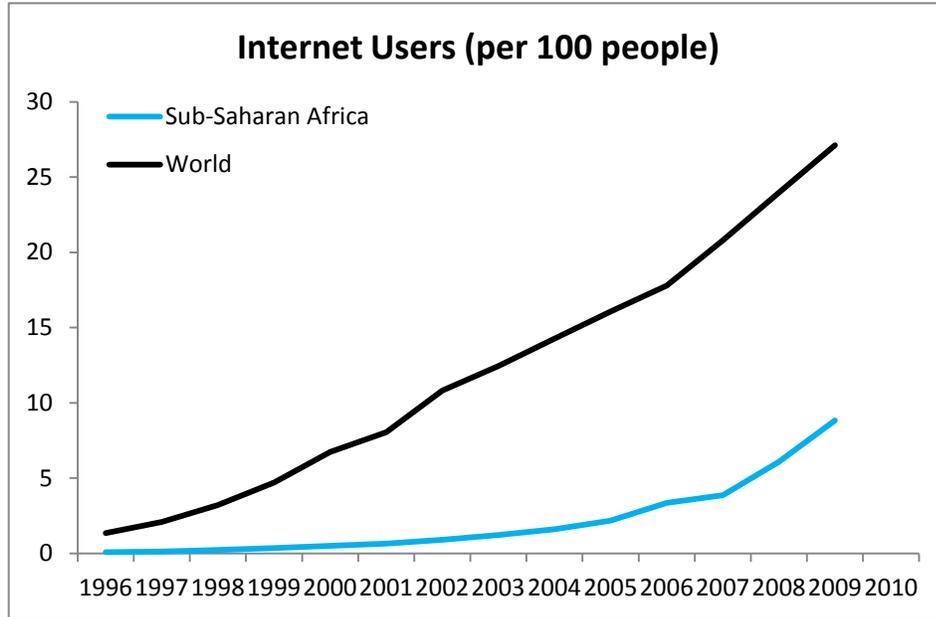


Figure 17

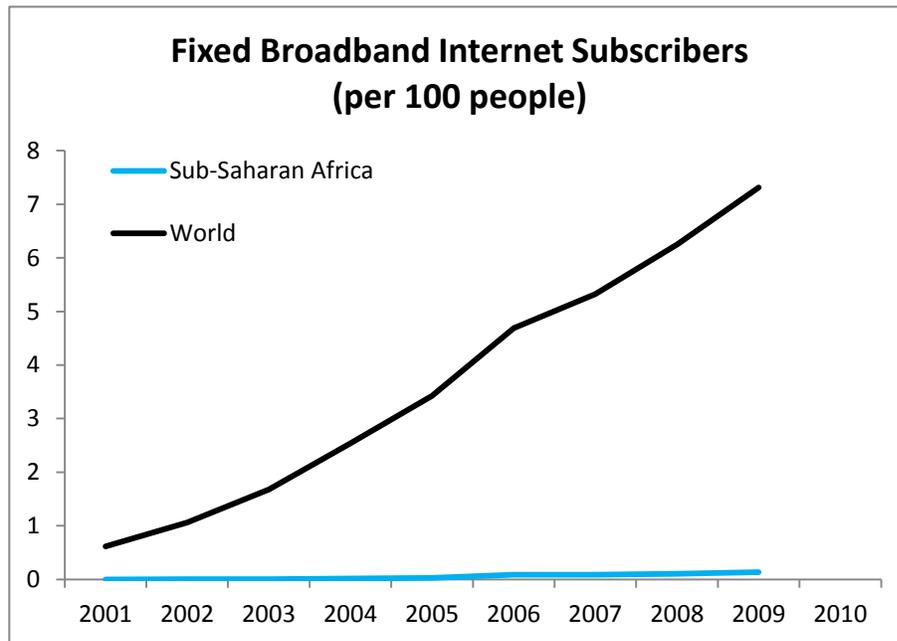


Figure 18

In recent years, more and more people are getting information by mobile phone, and the ways that this information flows is evolving rapidly, from word of mouth by voice, to text, to mobile software and platforms. Mobile access in Africa has consistently exceeded the world average since 2005. This is

clearly an area of great potential for development (see Figure 19).³⁸ In Kenya, even regions that are relatively isolated and disadvantaged show strong use of mobile phones. The widespread use of mobile phones and SMS had a significant effect on the 2007 elections, as citizens were able to message the outside world even in the face of a government-mandated media blackout, texting that the elections were fraudulent and violence was rampant.

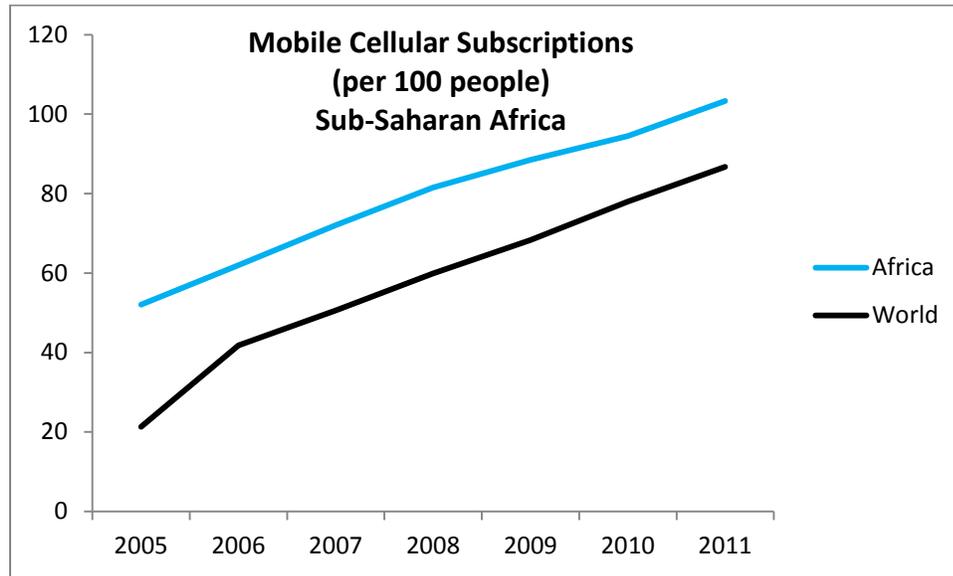


Figure 19

Another way to look at access to media beyond just infrastructure and subscriptions is audience behavior. Although access to audience research is minimal for the reasons described above, we are able to provide a partial snapshot that helps to illuminate current use and preferences. For over a decade, the Broadcasting Board of Governors (BBG) has conducted audience research through household surveys in developing countries to better understand how its programming (U.S. government-produced international broadcasting, such as Voice of America) impacts audiences around the world.³⁹ These surveys asked citizens to report their own media behavior and preferences, and thus give some perspective as to what is actually happening on the ground. Analysis of data from 2009/2010 shows some striking differences between Africa and the other regions of the world. Radio is king in Africa, with 61% of Africans reporting that they listen to the radio every day. This rate is more than double that of the next closest region, the Middle East and North Africa, at 29%.⁴⁰ Africans watch significantly less

³⁸ Data on mobile cellular subscriptions per 100 from the International Telecommunications Union, available at: <http://www.itu.int/en/pages/default.aspx>. The figures for 2011 are an estimate. Chart produced by the author.

³⁹ The BBG's surveys were conducted by InterMedia in 2009 and 2010; we combined the data into one dataset for a broader picture of the world.

⁴⁰ Eight countries were surveyed by the BBG and are included in this research (Angola, Burundi, Guinea, Rwanda, Somalia, Tanzania, Zambia, and Zimbabwe). Eight countries cannot be considered to be a necessarily representative sample of the region (and the entire sample of 48 countries cannot necessarily be considered to be representative of the developing world), yet the striking contrast in the importance in radio, reinforced by other qualitative research and scattered audience research provides a strong indication that the story of radio is in fact very distinct in the African context. In the concept paper, "Radio and Development" for the International Development Research Centre, Mary Myers identifies radio as the critical medium in Africa; "all the most recent and reliable surveys agree that radio is still the dominant mass-medium in Africa (see for instance

television than the rest of the world: with 33% of the population reporting that they watch TV every day, Africa trails far behind the next closest region, South Asia, at 50%. Only 8% of Africans say they read a newspaper every day, in line with low levels of literacy and the relatively high cost of newspapers (Figure 20).⁴¹

While not as striking a contrast as with radio, the use of SMS in the region is still significantly higher than for other regions. Nineteen percent of African survey respondents say they send or receive text messages every day, compared to 11% of Eurasian respondents, the next most active SMS users. Given the prominence of mobile in Africa seen above, this and other means of information exchange via mobile can be expected to rise significantly. Of those respondents who use SMS, Africans reported nearly the highest incidence of obtaining news by cell phone every day, at 35%, compared to other regions (Asia, at 36%, was also at the top)⁴². This includes but also goes beyond the use of SMS. These findings, together with the relatively high use of mobile phones in Africa in general, suggest an area of opportunity to improve information access.

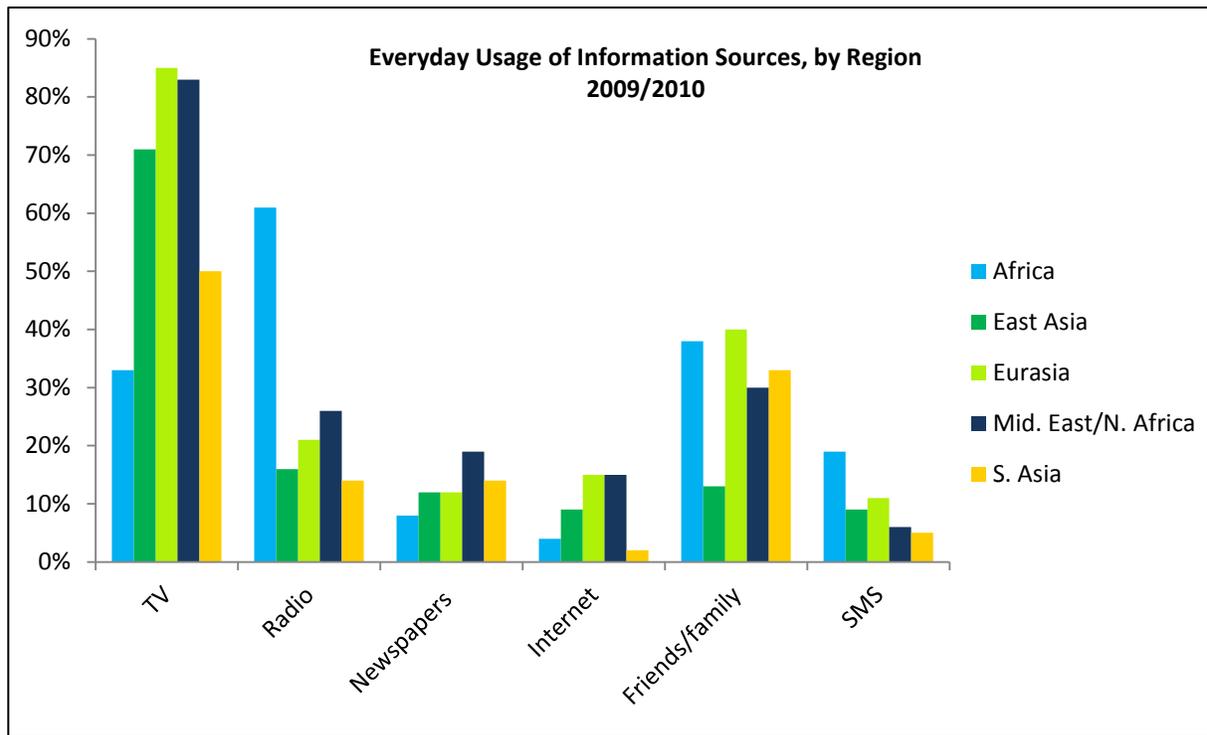


Figure 20

At this point, it is worth returning to the advertising data examine the extent to which ad spending impacts audience behavior, if at all. Looking at the breakdowns in advertising expenditure for

Balancing Act 2008; BBC WST, 2006; RIA, 2005), with the widest geographical reach and the highest audiences compared with TV, newspapers and other ICTs.” Myers 2009, p. 8. Media Map qualitative case study research also supports this evidence; see Frère, 2011; Gilberds, 2011, and Gagliardone, 2012.

⁴¹ Data from BBG/InterMedia. Chart produced by Aaron Horenstein.

⁴² Data from BBG/InterMedia. Summary of findings by Kimberly Johnson.

the top fifteen media markets in Sub-Saharan Africa, it is clear that advertising expenditure is not tied to patterns of media consumption, but other factors such as political influence. Total spending on television in these top markets is more than double the total spending for radio, and spending for print advertising is almost 1.5 times that for radio⁴³ (see Figure 21). This contrasts strongly with the audience behavior reported in Figure 20, where almost twice as many respondents report that they listen to the radio every day as those who watch television every day, and eight times more people listen to the radio daily as those who read newspapers every day. While these comparisons must be treated with caution,⁴⁴ the stark differences in spending vs. consumption are an indication that for media, the market is not functioning in a way that reflects audience habits or traditional advertising business models, in which advertisers would generally spend in line with audience behaviors and preferences. This emphasis does reflect that the elite in Africa are the best-educated people in the region. They are the most likely to consume newspapers and TV, and have the most economic and political power. Apart from political considerations, advertisers in Africa apparently prefer to attract a small but rich elite audience rather than a large but poor audience.

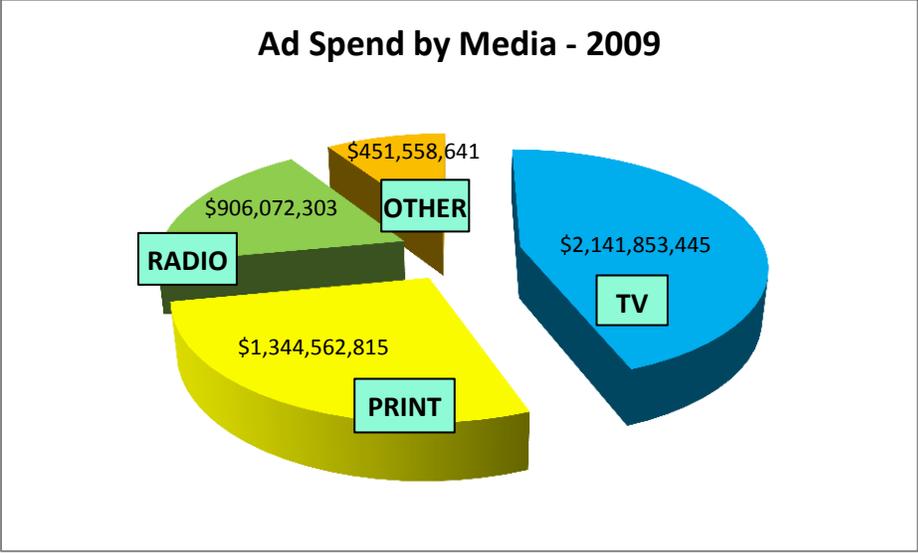


Figure 21

E. Citizen engagement with information

ICT Development

While access to media is unquestionably important, citizens need to be able to make sense of and engage with media in a meaningful way in order for access to grant any kind of benefit. Focusing on information and communications technology (ICT), the International Telecommunication Union created

⁴³ Data from Balancing Act. Chart produced by Sankalpa Dashrath. "Other" refers to Internet, outdoor, and cinema and thus is not useful for this type of broad comparison to what we know about audience preference.

⁴⁴ Again, neither group of countries can be said to necessarily represent Sub-Saharan Africa. Three countries are found in both the audience research data and in the advertising data: Angola, Tanzania, and Zimbabwe.

the ICT Development Index (ICTDI) to measure the concept of ICT development (a combination of access, use, and skills). The idea of ICT development integrates some concepts related to media development; note that ICTs and media overlap in part but are not equivalent. The ICTDI shows that, in the region over the last decade, ICT development has improved: this means increasing access, use, and user skills.⁴⁵ Interestingly, most of this improvement took place in the free press countries: between 2002 and 2008, those countries progressed more than twice as fast as the not free press countries (see Figure 22).

This analysis reveals that overall in Africa, while all elements of the index have risen, use and skills have not kept pace with access. (Use is defined here as fixed and mobile broadband penetration together with number of Internet users.) The ICTDI uses literacy and school enrollment as proxies for skills, which is a reminder of how information literacy is tied to literacy in general. All three elements – access, use, and skills – together with media literacy (the ability to critically assess the quality of any content) are necessary for the public to truly benefit from ICTs and media. For example, in Kenya, the most popular use of mobile phones is SMS messaging, however, more and more users are utilizing the technology to conduct financial transactions, access the Internet, and watch or listen to television and radio broadcasts. However, despite widespread access to phones for basic uses such as voice calls, some of the more innovative uses of mobile phones have been less widely adopted.⁴⁶

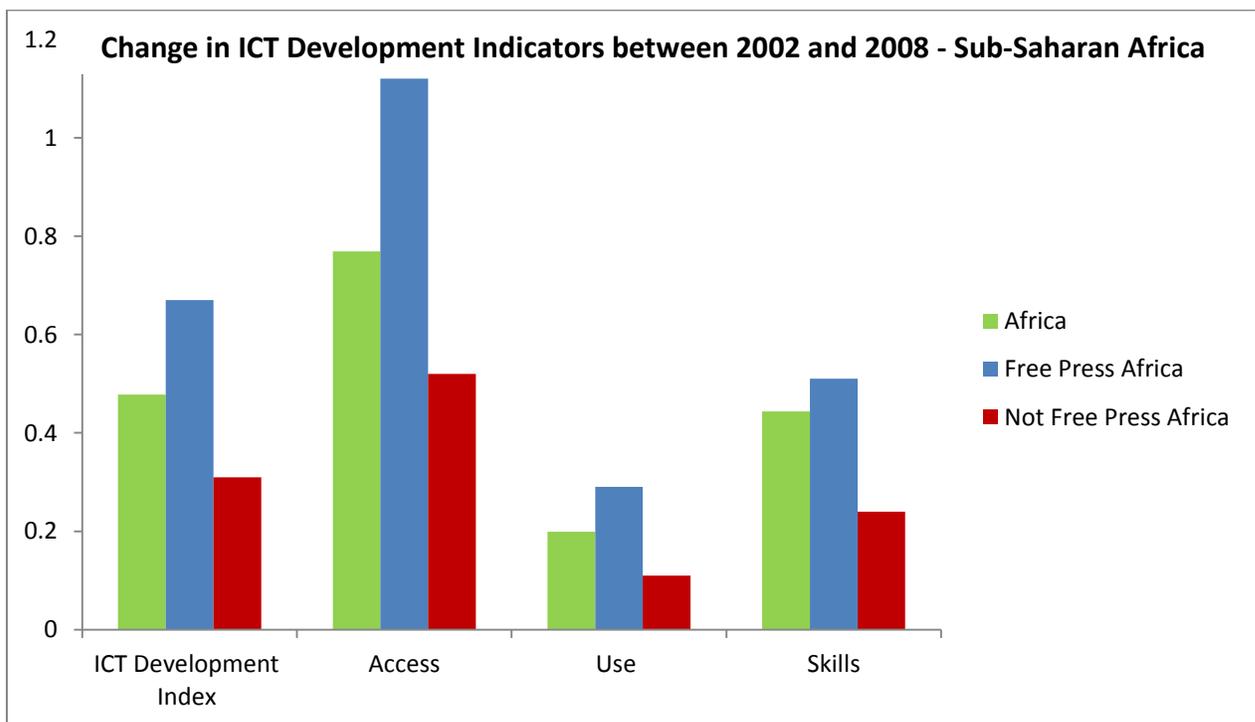


Figure 22

⁴⁵ The ICTDI has three relevant sub-scores: Access, Use, and Skills. For more information see: <http://www.itu.int/ITU-D/ict/>.

⁴⁶ See <http://www.audiencescapes.org/country-profiles/kenya/communication-profile-152>.

What do African audiences want?

To properly diagnose the health of any media sector, we need to measure in more detail how citizens interact with media on the ground. What are their information needs and preferences? What do they engage with? Which media do they trust? How do they make use of the information they gain through media? This is an area where audience research is again useful, to get the citizen perspective that is otherwise so difficult to capture. When we look at the snapshot created by BBG data on engagement with news, there is a remarkable contrast between Sub-Saharan Africa and the rest of the world. The percentage of respondents in African countries that were “very interested” in all news topics was substantially higher across the board than the average for the developing world.⁴⁷ A majority of respondents rated themselves as “very interested” in six of the topics offered. Overall, this research shows a striking picture of engagement with news among African citizens in eight countries (see Figure 23). Given the compelling evidence that media matters for development, and that the citizens of several African countries are keenly interested in news, these findings strongly suggest the need for more serious, strategic investment to support the news media in those countries, and indeed in the region.

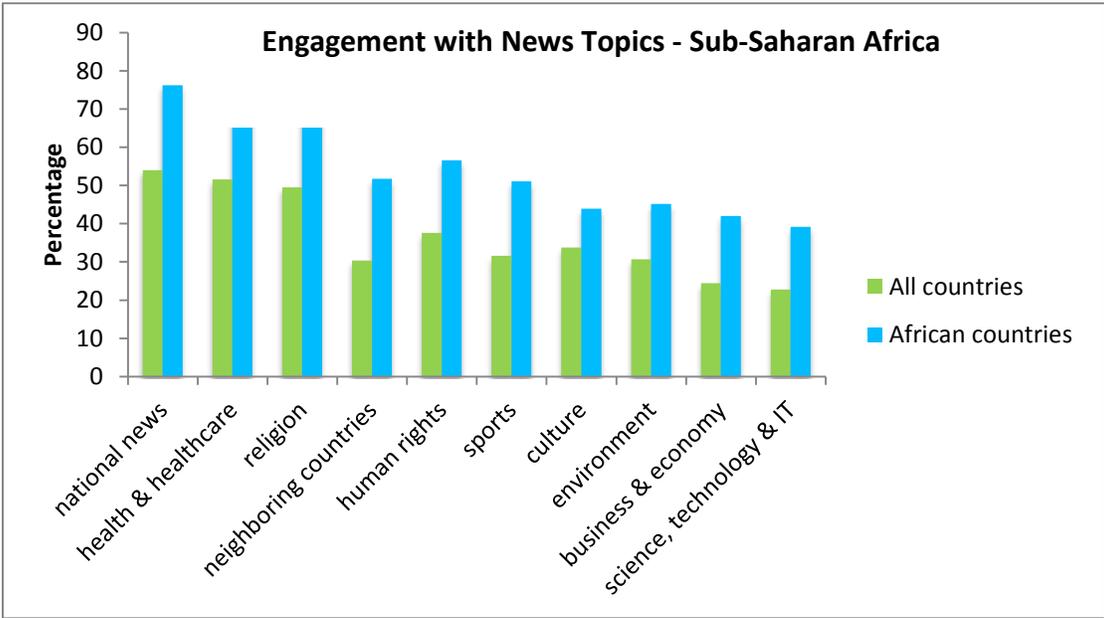


Figure 23

F. Quality of media content

Ideally, we need a measure of quality to be able to determine the health of the media sector. If the press is completely free but produces shoddy content, obviously the sector cannot be considered truly healthy. The MSI pillar that measures journalistic professionalism incorporates some sub-indicators that address content quality. As we saw, this was one of the lower MSI sub-scores across Africa. This is

⁴⁷ Respondents were given the choices of very interested, somewhat interested, not very interested, and not at all interested. Countries are the same as those represented in Figure 20. Data source: BBG/InterMedia. Chart produced by Audrey Ariss.

an area where more data are needed, both at the country level and at a micro level, to allow for a comparison of quality across different media producers within a country and over time. There is some patchwork micro data, mostly from individual project evaluations, but nothing appropriate to measuring the overall quality of any country's media. As critical as this area is to understanding media sectors, it may become harder and harder to measure as the line between professional and citizen media is blurring. Meanwhile, the idea of objective standards by which to assess the quality of media anywhere in the world will always be somewhat controversial.

Our case studies have assessed the overall quality of media in DRC, Kenya, and Mali as poor; other expert opinions have concurred. These countries and others throughout Africa suffer low levels of literacy, so that newspapers and the Internet are simply not viable source of news for large portions of the population. They also suffer from weak media literacy, meaning that people generally lack the ability to critically assess the quality of news. These factors limit the public's ability to demand and participate in the production of accurate, reliable, and well-produced information. In terms of the shoddiness of African media content, it is also important to raise the serious problem of paid-for news coverage which plagues the African media and is the main reason for poor quality journalism. As one media communications expert puts it, "The media in Africa is a topsy-turvy world in which content is paid for not by the readers/audience or advertisers, as in the West, but largely by those who wish to receive positive coverage and to promote themselves or their political party or cause through bribery of journalists and editors. This is done by everyone, from politicians, and local traditional chiefs to NGOs, churches, U.N. agencies and even diplomatic missions (embassies). 'He who pays the piper calls the tune' is the dominant pattern and largely the cause of the putrid state of the African media."⁴⁸

To summarize, we have identified here a number of critical areas in which the health of the African media sector could be improved: press freedom; business management (at the level of individual firms and of markets) and business models (both traditional and new models should be explored); professionalization of journalism; access to media including radio, but especially television, Internet, and fixed and mobile broadband; literacy in general and information literacy; and quality (both improving quality and ability to measure it). Africans' notable engagement with news and information, in addition to the growth of mobile, are potential areas of opportunity. Clearly, the problems are multi-faceted and interconnected; so too must be the solutions.

Additional research is needed into each of the elements to better understand the nuances of the challenges that prevent media from fulfilling its potential to support development. It is important to mention again here that this diagnosis is limited by a lack of sufficient data. Audience research data and market research data – when they exist and the quality is acceptable – are available only for purchase, creating obstacles for research. Beyond the dearth of audience and market research at the country level, our investigation into this area revealed a lack of coordinated, comparable, and longitudinal data across all of the countries of Sub-Saharan Africa. While some good data exists (particularly for more developed markets such as South Africa and Kenya), we were unable to find any data that would give us a broader

⁴⁸ Mary Myers, development communications consultant, personal communication, January 1, 2012.

picture of the region over time. This observation reveals another opportunity to strengthen the media sector: the collection of audience and market data.⁴⁹

Finally, we turn to the question of donor support to the media sector in Sub-Saharan Africa. To what extent have donors clearly diagnosed the different problems plaguing the media sector in different countries? To the extent that they have, how are they addressing them? Which interventions have made the greatest strides in supporting the health of the media sector, which in turn will support overall development? What are the areas of weakness and neglect?

Part Three: What have donors done to support the media? Has it helped?

What is media development support?

After considering the ways in which a healthier media sector contributes to development in Africa, and identifying several areas in which the health of the media sector across Africa is suffering, we turn to look at the work of international aid organizations trying to redress these challenges. Media development support is intended to improve the health of the media sector.⁵⁰ A healthy media sector is independent from both government and vested commercial interests, generates quality content that reaches citizens, and helps them to make informed decisions. A healthy media sector also means that people can access, engage with, and create their own content if they so desire, and gives citizens a voice in the governance of their country.

Donors and international NGOs have been working in the field of media development for at least 50 years, but mostly over the last two decades since the fall of the Soviet Union. Media development activities include journalism and management skills and ethics training, support for better press laws and licensing regulations, the creation of media centers, association and NGO-building, Internet security training, working with mobile phones and social media, teaching media literacy, and beyond. Our research has found that the overwhelming majority of international actors in media development fail to consider the research before they devise strategies, plan activities, or promote their work to the larger development community. Nonetheless, this paper has described a broad evidence base that could be marshaled to support or reevaluate the theories (whether articulated or not) that drive these actors.

⁴⁹ In fact, the countries that score the best in the MSI all have one thing in common, agreed-upon market ratings and relatively good audience research. Leon Morse of IREX / MSI observes: "South Africa, Croatia, Bulgaria and others that historically have the best scores all have institutionalized ratings and research. (These may not) be perfect, but they exist and are used by most media and, importantly, advertisers. The existence of this data helps to set realistic market rates, as opposed to reliance on either bad numbers or informal connections in advertising sales. But more broadly it presupposes some cooperation and organization in the market, which has broader implications (such as perhaps organized lobbying)." Thus, good research does not automatically guarantee a healthy media sector, but it is a critical part of the complex factors that do. Leon Morse, personal communication, August 9, 2011.

⁵⁰ Typically, practitioners consider media development to be distinct from what is called development communications, or media for development, which employs the media to deliver development-related messages (e.g. public service announcements about health practices).

Most international donors do not recognize media development as a development sector in its own right, at least in their official sectoral designations. In terms of funding structures, most of these media projects are rolled into governance or health initiatives. Media activities comprise a tiny portion of aid overall. A review of donor spending in media using OECD DAC figures for Media and Communications shows that as a percentage of overall spending on development, support to media does not seem to be increasing over time. Funding for media projects started at 0.5% of all aid in 2002 (the first year for which there are data), increasing only to 0.6% by 2006 and holding steady from 2007-2009.⁵¹ Despite the fact that media development is just a sliver of the overall aid pie, it is worth examining how effectively such programs have addressed the challenges of media in Africa, and considering how best to improve such interventions.

Case studies: DRC, Kenya, and Mali

We now dive into three case studies – Democratic Republic of the Congo, Kenya, and Mali – to illuminate further how some of these challenges to the health of media sectors in Africa play out on the ground. The case studies also reveal the extent to which donor interventions have met or failed to meet these challenges. The research questions for the case studies were focused on understanding donor-supported media projects over the last two decades, tracing major actors, activities, and impacts.⁵² This section will summarize how the media challenges and opportunities in each country have evolved over time, and will suggest ways to strengthen donor approaches to supporting the media in each context.⁵³ The choice of these three countries reflects the diversity of media scenarios to be found across Africa, from the example of not free press in the DRC, to partly free press in Kenya, to free press, represented by Mali. The following chart presents a snapshot of the most recent key indicators for each of the countries (Figure 24). Scores are color-coded green for countries that fall in the top third, yellow for the middle third, and red for the bottom third.⁵⁴

⁵¹ From Daniel Kaufmann's estimates in his presentation, "On Media Development & Freedoms in a Governance Context: An Outsider's Reflections, with Some Empirics," presented at OECD DAC GOVNET on June 7, 2011. The OECD DAC data that Kaufmann used is also just an estimate, but the best data available. These figures likely undercount spending on media development activities as defined above but may include spending on development communications (which at least in the U.S. is probably greater than spending on media development), public relations, and ICT infrastructure, none of which are included in Media Map's broad definition of media development.

⁵² The set of research questions for Kenya were slightly different, and focused more on questions of media convergence (especially radio and mobile) and where donor interventions are going in this area. Thus the snapshot of Kenya shown in this paper will also have this slightly narrower focus.

⁵³ For more detail, see the full reports: *Democratic Republic of the Congo*, by Marie-Soleil Frère, *Kenya*, by Katharine Reed Allen and Iginio Gagliardone, and *Mali*, by Heather Gilberts, at www.MediaMapResource.org.

⁵⁴ Chart produced by the author. All data except the Human Development Index is available for exploration and download on our website, www.MediaMapResource.org.

Snapshot of Media and Development in DRC, Kenya, and Mali			
	DRC (Congo)	Kenya	Mali
Freedom House Freedom of the Press, 2011	81 - Not Free	54 – Partly Free	24 - Free
Reporters Without Borders World Press Freedom Index, 2010	5183	1900	800
Media Sustainability Index, 2009	1.5 – Unsustainable mixed system	2.37 – Near sustainability	2.16 – Near sustainability
ICT Development Index, 2010	1.2	2.3	1.3
World Development Indicators - Internet Users per 100, 2009	0.6	10.1	1.7
World Governance Indicators Voice & Accountability Sub- Indicator, 2010	-1.4	-0.2	0.2
Human Development Index - Rank out of 187 Countries, 2011	187	143	175

Figure 24

Democratic Republic of the Congo⁵⁵

The media sector: overview and key challenges

The Democratic Republic of the Congo (DRC) is still recovering from major internal and regional conflict and suffers from extreme security challenges in some places, creating a difficult backdrop for media or any other type of development. Nonetheless, access to information has increased over the past twenty years, thanks to political liberalization at first and to technological developments later; of course, challenges still abound. In terms of sheer number of registered media outlets, the DRC tops the

⁵⁵ The section on DRC is adapted from Marie-Soleil Frère, “Democratic Republic of the Congo,” 2011.

African charts, whether print media, radio, or television. In 2008, 638 publications were registered countrywide, and there were 341 radio stations. While TV is still an essentially urban phenomenon due to very limited access to electricity around the country, there were 82 registered television stations. Despite the seemingly rich media landscape, citizens in the provinces are often deprived of access to information, as the media are concentrated in the capital city, Kinshasa. Poverty, low levels of literacy, and political instability also conspire to deny people access to information. It is almost impossible to obtain a complete picture of the Congolese media landscape, as media access in big cities, where most data is collected, is much greater than in the remote villages where most Congolese live.

The swath of red across the snapshot of indicators for DRC in Figure 24 gives a good indication of the deep problems plaguing this proliferating but unstable media sector. The expansion of Congolese media has been chaotic and largely uncontrolled, and the media content that is now abundantly available to Congolese citizens is typically inaccurate, sensationalistic, or takes the form of infomercials.⁵⁶ The vast majority of Congolese media houses face critical survival problems, and they suffer from a severe shortage of both material and technical capacity. Additionally, there is a high incidence of self-censorship, and journalists shy away from bold investigative reporting. These behaviors stem from a well-founded fear of persecution and a history of threats, violence, and killings by local and national authorities in the DRC as well as by the army and other armed groups.

The media sector is also highly distorted. Many private media outlets are the property of politicians who use them as instruments of personal promotion or support for their political allies; in Kinshasa there is a saying: “one minister, one newspaper.” Many media outlets that claim to be community-based actually belong to politicians and are devoted to serving their interests. The supposedly public broadcaster is the mouthpiece of the government, and the only “public service” broadcaster is a media development initiative: Radio Okapi, a U.N.-based station.

The legal and regulatory framework does not provide sufficient guarantees, controls, or even basic regulations to ensure that media outlets operate with any kind of formality. For example, many media outlets do not even have a bank account. They therefore operate informally, reflecting the economy of the DRC itself. The incomplete legal and regulatory framework results in constant violations both of freedom of the press, conducted with impunity, and of legal, regulatory and ethical norms by media professionals themselves.

The economic context in which media operate is eminently fragile. Congolese media outlets do not generate enough resources to sustain themselves financially, so they are dependent on external support from political and religious circles or from international assistance. Apart from Radio Okapi, the Congolese media operate on shoestring budgets and must survive in very difficult economic conditions. Community radio stations are especially fragile, both financially and in terms of their internal organization. Most do not have a real management department and survive day to day, with no budget plans.

⁵⁶ Observations about quality are made through the expert assessment of the original case study authors and other qualitative assessments that constitute their research. Again, no index on quality is available.

The advertising market is still undeveloped and disorganized, providing little financial backing to media companies. Many advertising contracts depend on personal contacts between the advertiser and the media owner. Audience data for the DRC is sparse and the information is often collected via questionable methods. Audience surveys commissioned and sponsored by the Congolese media themselves are nonexistent, due to lack of funds and a general disinterest on the part of media owners as to what their audiences need or want. Reliable data about budgets of private media—advertising revenue, media ownership and benefits for investors—are very difficult to collect and are never published. In all likelihood, the lack of transparency in the media business discourages this type of research.

The human resources for media are weak, whether in journalism, management and accounting, or technical matters. Working conditions are unstable. Salaries are low, irregular, and often nonexistent, which discourages quality work and often pushes journalists to find other resources to survive. Bribery of journalists, or *coupage*, is so endemic that rates are standardized: a newspaper story fetches \$10-20, a radio piece is worth \$20-30, and a television story nets \$50-200, to be shared among the TV team. Young journalists often regard their jobs as temporary, while waiting to find a better position elsewhere.

DRC scores the lowest of all countries on the Human Development Index. The low level of economic development overall, in addition to political instability, creates a difficult environment for media. Likewise, the impact of the media is limited by the fact that basic systems such as electricity, telephone and roads are unreliable at best and there is still no proper rule of law in the DRC.

Donor interventions

While there was a bit of support for Congolese media development in the 1990s, it only became a real priority for donors as part of the peace process following the brutal war that tore the country apart from 1997 to 2002. Donors' reasons for supporting the media sector have evolved depending on the country's political situation. Following is a summary of donor goals for media development over the past two decades:

- 1990 to 1997: to encourage new democratic media freedoms
- 2000 to 2004: to promote a return to peace and reconstruction during negotiations to solve the conflict
- 2004 to 2007: to enable the media to play a part during the electoral process, as the first democratic elections in forty years took place in 2006
- 2007 to 2011: to establish a solid and responsible press likely to take part in the consolidation of democracy

The DRC is among the world's most corrupt countries, and that has a corrosive effect on all aspects of society. The overall context in which donors and development NGOs operate is one of widespread corruption, bribery and embezzlement of funds. It is difficult to implement projects in any sector in a

country where the state, the rule of law, and the local institutions are so weak. International NGOs have to provide everything that the state should provide (but does not), while also coping with ongoing instability.

Totaling around \$80 million over the past ten years, media support by donors and operators has been quite varied. It has essentially covered five types of activities: 1) the creation of neutral and apolitical media and content, a common strategy in post-conflict countries; 2) direct support in the form of funds or equipment for media outlets; 3) media staff training; 4) strengthening of the sector's professional organizations and associations; and 5) consolidation of public institutions to organize the sector, including legal and regulatory reform.

In trying to tease out the causal factors in the media sector's development, it is difficult to separate the effects of donor-funded projects from the larger context. Those media companies or organizations that have received donor support have generally made the best progress. The support from donors seems to have increased media pluralism and promoted the professionalization of the sector in limited ways. However, not all media receiving aid have converted this support into qualitative progress, and certainly there are media entities, especially community radio stations in remote places, that play a useful role in their community without any donor support.

Created in 2002 as part of a partnership between the U.N. and the Swiss NGO Fondation Hirondelle (FH), Radio Okapi is currently the only radio station that covers practically the whole country. Congolese listeners deeply appreciate Radio Okapi, especially for its political neutrality and balanced reporting, as well as its national coverage. The station's ability to collect and disseminate information widely is unique in the DRC, and its professionalism has made Radio Okapi a model for other media. But the station faces a major sustainability challenge. Its substantial budget is disproportionate to the local economy; in fact, it is more than ten times the annual budget of any of the best performing private media outlets. Moreover, tensions have repeatedly arisen between the U.N. and FH that typify the aid community's sometimes-conflicting perspectives on the role of support to the media. The U.N. mission staff often does not understand why "its own" radio can criticize the U.N. mission. Meanwhile, FH believes that Radio Okapi, as a news outlet, should not be a tool for the U.N. to publicize itself, but a source of neutral, independent, and pluralistic journalism.

Since most donors do not recognize media support as an aid sector, formal donor coordination in the field of media development is rare. In Congo, however, there is a forum for information sharing, the Inter-Donor Media Group (known by its French acronym, GIBM), which started in 2005. GIBM allows all donors in the sector to present their media initiatives, in order to avoid overlap and encourage cooperation. This process has been helpful in reducing some duplication of efforts and allowing for an exchange of activities. However, donor agendas are still sometimes at odds with one another, and further, the group is based in Kinshasa, with limited perspective on activities in the provinces.

Journalism schools exist in DRC but have not received external support over the last two decades, and are not at all equal to the task of educating a professional sector of journalists. Support for

permanent training institutions has been limited, but short-term training projects proliferate, many of them focused on thematic areas such as elections or health. Unfortunately, the long-term impact of these brief, one-off trainings appears to be minimal to non-existent.

The largest portion of donor support in DRC has gone towards the creation of media outlets and content. In a country where most local media are heavily politicized and frequently spread rumors and biased information, these projects have encouraged the dissemination of some professional, neutral, and rigorously reported news and information. However, the presence of these media created by international NGOs, relying on outside funding from donors, distorts the market. Further, although they are often referred to as models for indigenous media to emulate, they do nothing directly to help strengthen the capacities of local media. In fact, international projects have lured skilled workers away from many local media outlets by offering higher salaries. These media are exogenous and, by their nature, relatively short-lived, closing down when funding ends. Unfortunately, they create expectations among their audience for a level of professionalism (e.g. balanced reporting) which no Congolese media are likely to be able to fulfill once they have gone.

Support to existing community radio stations, while of smaller scale, has had some positive impacts. This support makes it possible for independent local media outlets to survive in cases where they otherwise might not. It thus helps to support pluralism, including multiple perspectives and voices, and protect fragile initiatives such as community radio. However, such core funding can stifle the media's drive to innovate to remain competitive and generate resources locally, which can reinforce financial dependence on aid. The local station may also prove unable to absorb the amount of outside funding responsibly: injections of too much money at once can prove destabilizing, generating corruption and internal conflicts.

Donor support for legal and regulatory reform seems to have more positive than negative impacts, though the sector is still far from well-structured or well-defined. A new regulatory authority has been established, and the different actors in the sector at least now accept the principle of public regulation. New awareness of these issues is a critical first step.

Some beneficiaries are very critical of the development aid process, especially the distorted relationship between Northern NGOs and donors, and Congolese media actors. These critics say that the choices made by the different donors have often been guided by their own institutional strategy, sometimes even in order to compete with other donors, rather than out of a concern for effectiveness or usefulness in the local context or to complement what has already been achieved. Others see good intentions, but note that the transfer of skills to local workers within projects is neither sufficient nor clearly defined. Even those that recognize good intentions lament the tendency of aid recipients to become dependent on donors. Aid is typically channeled through international NGOs that are able to satisfy the tender requirements; these organizations can absorb up to 50% of project funding for their own operating expenses. Often, donors with experience elsewhere arrive in Congo with a pre-planned program that is not relevant to the DRC context.

Local beneficiaries also complain of a lack of transparency on the part of both donors and international NGOs. Without a clear understanding of what funds are spent on, DRC media aid recipients don't fully trust these international organizations. The donor coordination group has improved the sharing of information, but has not completely prevented duplication or halted the competitiveness in which local actors are sometimes exploited.

International organizations cite a number of issues that limit the effectiveness of donor interventions. These include Congolese organizations' unrealistic expectations of what can be accomplished with donor support, limited local capacity (particularly for administrative work), and high levels of competition and even polarization among DRC media organizations.

Improving the health of the media sector

The evidence points to several specific areas where donor interventions could be improved. Many of these are not unique to the media but should be addressed together with other development and governance initiatives. First, for the most part, Congolese public institutions have been more of a hindrance than a help to the media sector. There can be no long-term, sustainable impact without the political commitment of the government, respect for the rule of law, and tackling of endemic corruption. Secondly, as we have seen, a healthy media sector seems to develop alongside, and perhaps support, development and good governance: in the case of DRC, there is an additional nuance. At this point in the country's history, it needs the government's commitment to move the media sector forward. As media outlets gain in strength and professionalism, they in turn can help improve and reinforce good governance. Thirdly, freedom of the press and access to information may help promote political stability in DRC, as the general analysis at the end of Part One of this paper suggested. While evidence shows this is likely, the difficult context in DRC indicates that this process can only succeed if it takes place in concert with improvements in development and governance overall.

Donors should take the approach that media support in the DRC needs to focus on supporting access to information as a goal in and of itself rather than serve as a tool of peace-building, poverty reduction, promotion of good governance, or other development goals. Such instrumentalization of the media will do little to improve the health of the sector. When media support is focused on providing citizens with access to reliable news and information, the media sector becomes stronger and more balanced overall. Media support should also include improving genuine freedom of the press. Currently DRC's press is "free" to create sensationalistic, politically motivated content, and to accept payment for doing so. However, the sector is still a long way from enjoying the freedom to systematically produce the kind of information that citizens need, both for their own lives and to hold their government to account.

Critically, the media sector still lacks professionalism, but the short-term theme-based trainings that donors often employ do little to accomplish this. Professionalization of the media sector should be linked to efforts to improve literacy and education at all levels. DRC's media is also critically weak in

business terms. Advertisers do not make decisions on the normal basis of audiences and market shares, and most media companies do not fully operate as businesses and are not financially self-sustainable. Similar to the issue of improving journalistic professionalism, the problems of running media as a business and overcoming the chaos of the media market will never be fully resolved until the country's business regulations and practices overall are overhauled.

Further, interventions are needed to improve citizens' access to media. Although several projects have increased the broadcasting capacity or the circulation of certain media, very few projects have worked to increase access to receiving devices, such as by equipping community centers for collective listening or television viewing, or distributing windup or solar radio sets. While mobile phones have become widespread, so far no project has tried to use them in a systematic way to collect or disseminate news and information. This goes beyond just providing equipment, but also making sure that people know how to receive and respond to the information and to use and maintain the equipment. Access to information must include all demographics, throughout the country.

As such projects are undertaken, it is important to attend to the way it is conducted, specifically in terms of the balance of power between donors and beneficiaries. Donors and international NGOs will need to address the sense of dispossession that some elements of the DRC community feel, and the sense that they are being forced to submit to objectives and procedures imposed by foreigners. Redress should include giving real responsibility to local organizations, in addition to implementing better-coordinated and longer-term projects.

Kenya⁵⁷

The media sector: Overview and key challenges

The development of the media sector in Kenya is closely tied to its political history. In particular, Kenya's history of colonialism, post-independence political competitions, authoritarianism, and subsequent political and economic liberalization has hindered the pace and depth of media development. To put Kenya's media situation in context, the data in Figure 24 indicate better sustainability, a freer media, better development in ICTs, and a greater ability for citizens to hold their government to account than the DRC. These assessments were borne out in the case study research. Nonetheless, Kenya still has further to go for the media sector to become healthy; despite advances in media freedom and development and a new constitution, the mass media in Kenya remains hostage to many institutional and cultural pressures.

Economic liberalization spurred by the international donor community helped grow the media in Kenya to a certain extent. However, as with many nations following a neoliberal liberalization model, Kenya now faces a potential crisis in terms of the concentration of media ownership, as there have been no ownership regulations or restriction imposed (or proposed) on corporate or political interests. The media sector in Kenya has been moving towards monopoly, concentrating ownership in a few hands.

⁵⁷ This section is adapted from Katharine Reed Allen and Iginio Gagliardone, "Kenya," 2012.

Private broadcasters demonstrate a tendency toward bias. This is exacerbated by cross-media ownership, which has in many cases led to duplication of content across media and the dominance of a single orientation across various channels with a single owner. Media owners with strong political affiliations tend to be politically co-opted, and they influence editorial policy in line with their persuasions. Almost every channel can be identified with a political party or personality. Concentration of ownership, political bias, and corruption are the three major structural challenges to the health of the media sector in Kenya.

Though Kenya has more than seven daily newspapers, 100 radio stations, 17 television stations and 13 weekly and monthly papers, the market is dominated by four groups. These are the Nation Media Group, the Standard Media Group, The Royal Media Group, and Radio Africa, each combining print and broadcast media, distribution and publishing. This handful of players has raised the existing barriers to entry into the media market through methods ranging from interference with licensing procedures to monopolizing advertising and distribution networks.

Despite the trend toward monopoly and lack of legislation empowering community and alternative media, there has been a promising rise in community radio. Such stations are most often funded by development agencies and strive to provide small, rural and remote communities with reliable news and information in order to inform and stimulate public debate. Kenya now has over 11 radio stations owned and operated by various communities across the country. Community ownership is exceedingly difficult to maintain, which threatens the sustainability and quality of community radio. The stations depend on donor funding and many teeter on the edge of collapse for lack of money. Distinguishable from community radio are local, regional, and ethnically based radio stations. Like community radio, these stations have also experienced growth. Unlike community radio, which is seen as a reliable and calming force during times of political instability such as the aftermath of the 2007 elections, these local radio stations have been widely criticized for inciting ethnic tensions and violence.

Since 1998, Kenya has made progressive reforms in its mobile telephony and Internet services. The policy reforms coincide with Kenya's international commitments, initially under the General Agreement on Tariffs and Trade, now the World Trade Organization. The cost of communication via Internet, while still prohibitive for most Kenyans, has been dropping as Kenya has liberalized ICT policy.

Throughout the process of drafting and implementing media laws, the Kenyan government has resisted regulating media ownership or political interference in media freedom. But with the adoption of the new constitution in 2010, Kenyan media has reached its highest degree of independence and autonomy from state interference to date. The media was previously manipulated by individuals and frequently embroiled in political struggles, and thus could not speak for the general public. This constitutionally ensured independence is the greatest achievement in the Kenyan media sector in recent years. Notwithstanding these developments, there are still legal restraints to a free media.

Another significant challenge to the health of the sector is the state of the Kenyan economy. Many Kenyans are struggling to provide for themselves, given high food prices and widespread poverty. They thus cannot afford to buy a newspaper, let alone a television. The weak economy has indirectly

influenced the quality of news, as advertising dwindles and investigative journalism becomes too costly for media houses to undertake.

While the media in Kenya has developed into an independent, diverse and thriving sector, there are still important challenges to the profession of journalism and to the continued development of free and pluralistic media. On the one hand, the media play critical roles: as watchdogs of political abuse of the public trust; as disseminators of information to the wider public; and as mobilizers of political action. On the other hand, Kenyan media have frequently been politically co-opted, acting as channels of misinformation and propaganda, and have thereby undermined their position as credible sources of information for the public.

One of the greatest challenges to Kenyan media is its lack of journalistic professionalism. This is evident in widespread inaccurate reporting and lack of balance in media stories. Training in media ethics is either inadequate or totally lacking. More investment is required in journalism training, as professionals lack vital skills to conduct investigative journalism or find and analyze data. Although the number of journalism schools continues to increase, proper training is expensive, the schools lack modern equipment and facilities, and often the programs are too general and fail to provide journalist-specific skills.

Standards of professionalism vary from one organization to the next. Larger media organizations such as the Nation Media Group and the Standard Group tend to recruit and employ professionally trained journalists. However, the same is not the case with smaller organizations. Most journalists are poorly paid and this contributes to their vulnerability to bribery. Self-censorship is widely practiced; bias and corruption are common. Additionally, although journalists fare better in Kenya than in DRC where violence against journalists arises from internal conflict, journalists in Kenya are still vulnerable to violence.

Opportunities in the rise in ICTs and media convergence

Information and communication technologies (ICTs) have spread progressively across Kenya, facilitated by increasing competition among telecommunication operators, greater availability of bandwidth, and the emergence of a relatively large pool of IT professionals, entrepreneurs, and civil society operators. This is turning Kenya into one of the most significant hubs of innovation on the African continent. The country is becoming a space where different actors, including government, private operators, donor agencies, and national and international NGOs, are experimenting with new ways to use technologies to support development. According to Dr. Levi Obonyo, Director of the Media Council of Kenya, new ICT-enabled platforms “are not only offering new opportunities, they are shaping a new idea of the future.”⁵⁸

Together with the digital revolution, Kenya is currently undergoing a process of political transition. This transition is characterized by profound contradictions. Liberalization in politics and

⁵⁸ Personal communication, August 2011.

communication has helped create the terrain for new players to experiment with innovative forms of engagement and participation. However, it has also exacerbated existing divisions in Kenyan society, especially among different ethnic groups, often with dire consequences.

The increasing liberalization and independence of the media sector has in recent years led to intense competition for advertising revenue and audience share. This in turn has significantly reduced the costs of media use and information consumption. This development has greatly benefited the average Kenyan, as mobile phones in particular are now affordable for almost everyone; Internet usage prices are also declining.

With the increase in competition, price wars and the emergence of new platforms for consuming and distributing information, traditional media, especially print outlets, are finding it difficult to maintain their business model, while continuing to provide public information and critical journalism. Radio and mobile phones are currently the media most used to disseminate information.

Various innovative ICT and governance projects are encouraging young Kenyans to create a new image of their country, one where people can explore alternatives to the way the country is run, and test ways to keep leaders and powerbrokers accountable. Some of the most innovative projects are led by Kenyans who have created local versions of platforms that proved successful elsewhere, or have developed new platforms of their own. The case of www.mzalendo.com belongs to the first category, as it represents a Kenyan version of TheyWorkForYou.com, a British website that lets citizens follow the work of their elected officials, aimed at keeping MPs accountable for their performance. The second category accounts for radically new platforms such as Ushahidi, a site for crowdsourced crisis mapping, and similar projects that are largely the product of local entrepreneurs working with transnational activist networks. These projects have quickly captured the attention of international NGOs and donor agencies, which have started to invest in ICT-enabled programs that employ locally available platforms and media aimed, for example, at promoting accountability or guaranteeing peaceful elections. Bilateral donors such as USAID, DFID, Danida, CIDA, and the Dutch embassy, as well as multilateral donors such as the World Bank and UNDP, have been among the most active in sponsoring initiatives in these new areas, channeling funds through relatively large international NGOs such as Internews and HIVOS, but also sponsoring smaller initiatives at the local level. Smaller international NGOs and philanthropic organizations such as the Indigo Trust and the Omidyar Network have also helped strengthen this wave of Kenyan innovation.

As new technologies spread, opportunities to combine new and older media increase. Innovation is creating new tools and technologies, such as smartphones, for hosting forms of communication that were previously characteristic of distinct media. At the same time, the combination of different media is fashioning new hybrid forms of communication. For instance, mobile phones are offering new opportunities for audiences to participate in radio broadcasting and on-air debates. The combination of mobile phones and community radios is enhancing public participation in Kenya across divides such as income, gender, tribe, and age. The powerful ability of radio and mobile phones to both collect and disseminate news results in wider audience engagement, especially in rural or marginalized areas, such as city slums. Three phenomena in particular are significant in relation to the emergence of

hybrid media: the increased ability for ordinary Kenyans to participate in public debates; the possibility of translating opportunities emerging in one platform into other platforms; and the increased ability to collect and employ public opinion, often in problematic ways (for example, publicizing unscientific polls as representative of popular opinion). Overall, Kenya's media and ICT sectors show both great challenges and great promise for evolution and growth.

Improving the health of ICTs and the media sector

Most of the significant examples of media/ICT convergence and innovation in Kenya seem to be emerging from initiatives led by the media houses and the telecom operators themselves, rather than by donor agencies. Donors have supported innovation once they have identified initial successes, but they are not at the forefront, and they have not funded innovation themselves.

A few recommendations flow from these observations. First, in their support for traditional media, innovative ICTs, and converged media, donors should be careful not to harness such support to other specific goals (e.g. health, governance, or conflict mitigation), but rather foster development of a vibrant, free, and independent media in its own right that produces quality content. Second, while donors should certainly keep abreast of innovation in Kenya, the most appropriate role for donors may be in helping to create a better enabling environment, promoting freedom of the press and freedom of expression, and addressing corruption: all of these efforts will create an environment more conducive to innovation. Third, Kenya's innovation in ICTs and media suggests opportunities for donors to coordinate South-South and South-North learning exchanges to exchange lessons learned and improve aid effectiveness.

It is also important not to get carried away by the promise and excitement of innovation without attending to basic ICT development issues; recall from Figure 24 that Kenya's ICT development score, while higher than that of DRC and Mali, still falls among the lowest third of the countries rated. Most Kenyans still lack the access and skills that would enable them to participate fully in Kenya's ICT growth. In the same vein, donors should not assume that innovation will automatically trigger a kind of technological determinism wherein equitable growth and development will naturally arise.

To recap from earlier in this discussion, other key arenas in which to support traditional (and converged) media in Kenya include: fostering the professionalization of the media sector, particularly in smaller organizations like community radio stations (together with literacy and education initiatives), and improving the business side of media, which in Kenya means addressing the concentration of ownership and the political bias of owners that colors the content of the biggest media organizations.

Last, we must examine the extent to which increased access to information and freedom of the press can help lead to political stability in Kenya. Given the role that ethnically based local radio had in inciting the 2007-08 post-election violence, for example, a central question is clearly what *kind* of content is produced. Also, with expanded opportunities for citizens to enter into the public debate, it is important for different actors, from NGOs to government and donor agencies, not simply to facilitate

the opening of new spaces for citizens to express themselves, but also to ensure that those spaces are monitored. This will help ascertain that they are not simply benefiting from the aura of newness characterizing certain media, but are genuinely representing a diversity of public voices and enriching the democratic debate. Donor support for press freedom and access to information must go hand-in-hand with efforts to open up well-moderated public debate, promote pluralism, and reduce bias, while addressing corruption within the media sector and government.

Mali⁵⁹

The media sector: Overview and key challenges

In Mali, wide-scale decentralization of social institutions occurred in the 1990s as the country underwent a transition to democracy; devolution of governmental control of Mali's media and communications networks occurred at the same time. As a consequence, an explosion of private media providers (especially radio) erupted throughout the country. Perhaps the greatest success of Mali's media landscape lies in the development of its community radio sector, which provides citizens with accessible information in local languages, on a broad range of development issues, including health, agriculture and the environment. The development of this sector is widely recognized as one of the factors assisting a successful decentralization process, through its ability to provide citizens with a venue for public discussion and to facilitate interactions between citizens and local levels of government.

Mali's media sector is currently considered to be an exemplar on the African continent. Freedom of the press indices consistently highlight the media in Mali for its plurality, diversity, and freedom (as is evident in Figure 24). In fact, Mali has the highest level of press freedom in Africa, a region where a minority of countries has a free press at all. The legal framework for media, which was established with donor support, protects pluralism and freedom of expression. Constitutional and legal freedoms are indeed important, but Mali's media sector achieved these gains back in the 1990s. It could be argued that now, 20 years later, legal protection of press freedom is not enough. Real-life challenges, such as the absence of journalism schools, have meant that few Malian journalists have received the training necessary to perform their jobs professionally.

Despite the high level of press freedom, a rise in pluralism, and incremental improvements in journalistic practice and ethics, great challenges still remain in Mali. As is the case in DRC and Kenya, key issues include two critical deficiencies identified in Part Two of this paper: journalistic professionalism and the business side of media, meaning both the functioning of the media market and business management practices. In terms of challenges to professionalism, the media sector lacks adequate training opportunities, journalists suffer poor working conditions, and salaries tend to be close to minimum wage. This means that most journalists have the equivalent of a high school education, and

⁵⁹ The section on Mali is adapted from Heather Gilberds, "Mali," 2011.

further, that journalists are vulnerable to bribery simply to be able to survive. Libel is still punishable as a criminal offense, contributing to journalists' tendency to self-censor.

The business environment is affected by indiscriminate licensing, and related to this, the media market is saturated with private stations lacking in quality and unable to sustain themselves outside of donor funding. Business models are poorly developed. Further, the advertising market in Mali is not very diversified: it is dominated by the state and two large telecommunications companies. While the government does not directly influence editorial policy, reports suggest that shares of the advertising market are often dependent upon a favorable state-client relationship. One of the difficulties in expanding the advertising market is that audience research is extremely underdeveloped in the media sector. Most media organizations do not have any structures in place to measure their audiences. Many Malians enter into the media industry with insufficient resources, and establish enterprises that are unable to make ends meet each month, much less invest in market research. These challenges, together with poor business management practices, mean many media organizations are not sustainable over the long term and must continually struggle for survival.

There are important access issues as well: stations are clustered near urban centers, leaving the most rural and hostile areas of the north largely out of reach. There is a shortage of equipment, and an inability to repair and upgrade existing equipment. Economic roadblocks, such as a poor advertising base, low purchasing power due to poverty, and a poor distribution network, continue to inhibit the development of the media in Mali.

Access to the Internet is developing, in terms of infrastructure expansion, cost reduction, and users' familiarity with the technology. However, Mali's media has a very small Internet presence. More importantly, Internet access is expensive and, given that most Malians live on the equivalent of less than one U.S. dollar per day, paying for service at a community media center is a luxury they cannot afford. Mali has much lower Internet use than the rest of Sub-Saharan Africa, even as such use is increasing on the rest of the continent. As we saw in Figure 17, Africa still lags far behind the world in general, which puts Mali near the bottom of the heap when it comes to Internet use.

Improving the health of the media sector

There is a long history of donor-funded development programs in Mali, which mushroomed during the democratization period (1991-1998) as international organizations sought to strengthen the country's institutions. Donor funding to support the media reached its height during this period. Based on the idea that the media acts as the fourth estate, donors perceived the need to enhance democracy through increasing the diversity and plurality of media in Mali. The major donors to the media during this period were bilateral and multilateral development organizations, notably the French and German embassies, Panos, the U.N. and USAID. Important donor-funded initiatives have included the establishment of a press house (La Maison de la Presse du Mali) and a broadcast union (Union des radiodiffusions et télévisions libres du Mali, or URTEL).

Foreign donors originally funded a great deal of the infrastructure and the start-up of new media organizations, in addition to training new journalists to fill positions in the rapidly expanding sector. USAID was responsible for bringing the Internet to Mali. Donors no longer fund infrastructure or the establishment of new organizations, but are primarily involved in providing training and equipment, as well as supporting particular campaigns. Unfortunately, donor support to the media has significantly declined in recent years, and bilateral and multilateral agencies have shifted their aid agendas to support other sectors. Over the past 20 years, funding has shifted away from programs designed to strengthen independent media, and towards programs that see media as a tool to further other development priorities, such as health and livelihoods. It remains unclear what the impact of many of these foreign interventions are, and there is a distinct lack of coordinated efforts on the part of bilateral and multilateral organizations and NGOs.

Mali's media sector suffers from an over-reliance on donor-funded projects and is generally thought to be unsustainable. The saturation of the independent radio sector has created stiff competition among radio stations for donor funding. From one perspective, it appears that competition for funding has led stations to bend their missions and values in accordance with donor priorities, which now tend to focus on instrumentalizing the media to support other development areas. Most critics argue that improved business practices would go far to enable a more democratic and vibrant media sector to flourish in Mali.



This photograph, taken in the conference room in the Bamako office of the Union of Radio and Television (URTEL), illustrates the degree of the organization's dependence on international donors. URTEL is the most important community radio organization in the country, with over 200 member stations, and is often used by donors as a central organization through which to channel funding for media development. The large wall hanging, a batik cloth dated 1998, hangs over the central conference table. Photo by Tara Susman-Peña.

Donor funding has benefited the sector in terms of supporting the establishment of several key elements: a legal environment that supports the independence of journalists and enables freedom of expression, a diverse and robust network of professional journalism associations and advocacy groups, and a plural and diverse media system that reaches even the most remote parts of the country. However, the media sector still faces gaps that donors could help fill, and there are clear ways for donors to improve the work they are already doing.

These areas include the establishment and development of one or more professional journalism schools, and helping to institutionalize business training and good business practices amongst media professionals. The shift towards theme-based short-term trainings has not been beneficial to the health of the media sector. Donors have started to recognize the importance of the media's role in ensuring transparency and holding the government to account. This is an appropriate reason for donors to focus

on media, recalling the findings on media and governance in Africa discussed in Part One of this paper. But again, rather than trainings focusing on elections or health, overall transfer of skills and capacity building of the sector is more effective. A greater focus on building business skills, including the ability to collect and analyze media-related data, would strengthen the sector. Other problems in donors' approaches to their interventions include supply-driven implementation of projects, the over-centralization of funding through one local organization, and a lack of coordination among donors themselves. Continuing to build access to information and citizens' skills to engage with what does exist are other important issues. All these areas could be improved through an approach that uses better diagnostics to help design a country-driven development agenda.

Donor interventions and media development in Africa

These three brief portraits reveal some consistent needs across all three countries (with the devil in the details of making interventions appropriate to each context) and some stark differences as well. One striking similarity is worth highlighting: in these three countries in Africa, the cultural concept of *what the media is for* is quite different from the Western ideal that donor interventions are trying to achieve. The Western ideal is a media sector that is independent, unbiased, and informative on topics that people both need and want to know about. In DRC, Kenya, and Mali, the news media is generally a means to a political end, not a business that produces information and tries to levy the market value for this information from its audience. This does not mean that donors should shy away from supporting the media, though some have done so because of perceived political sensitivities. But it does mean considering what it would take to fundamentally transform the culture of news in each country.

Following are key areas from all three countries' media sectors where donors could be most effective:

- Confronting the overwhelming use of the news media by different actors for political purposes
- Reducing corruption, both within the media and in the government
- Remediating lack of freedom of the press in DRC and Kenya (and a problematic libel law in Mali)
- Strengthening business management of individual media outlets
- Improving the functioning of the media as a market within the economy of the country overall
- Building capacity to perform audience research and market research, and developing understanding within the media sector of the value of using such research
- Increasing professionalism for the sector as a whole, not to improve individuals' skills, including support for journalism schools (tying such efforts to literacy and education work), skills transfer, and ethics training
- Fostering access to information for citizens, especially in remote and unstable areas, including addressing infrastructure, the ability to maintain that infrastructure, equitable distribution, ICT skills, and media literacy
- Tying areas all these efforts to other existing development work

Additionally, some donor practices that have proven ineffective across all countries are worth highlighting:

- Letting political considerations, rather than need and country-identified, country-driven issues, drive where aid goes
- Rather than conducting diagnostics together with beneficiary-identified priorities, working from supply-driven, pre-conceived models and implementation plans
- Not trying to build the government's will and commitment to: 1) accept and support a media sector that may criticize them, 2) respect the rule of law, and 3) tackling the problem of corruption
- Ignoring donor-beneficiary power dynamics, whether by helping to create a system of dependency, not modeling the behavior that donors demand of local organizations (especially transparency), or denying local organizations the ability to control their own development
- Falling short in coordinating with other donors
- Failing to maintain institutional memory for their own support to the media sector, and in most cases, not even keeping basic records about what was supported, how much spent, for how long, etc.
- Supporting thematically based, short-term trainings

Conclusion

Donor support to media should facilitate the media's independence from the government and other outside influences, promote its freedom to disseminate information to the public and to represent the public's needs to decision-makers, and improve the quality of the news produced. In turn, such an improved news media, by maintaining a free flow of information, should keep the government transparent, vitalize the market economy, and provide citizens with critical information to hold their governments to account. Further, such a media should be considered a public good in and of itself, and access to information and freedom of expression should be recognized as basic human rights.

Despite compelling evidence that validates the process just described, support for developing the media sector has not been incorporated into international policy at a level commensurate with media's importance. The lack of a strong bridge between research and policy has meant that media development is neither recognized as a sector by most donors, nor well integrated into development principles, policy, or practice at the strategic level. Without access to research that supports the case for media development, donors shy away from such efforts, often because intervening in the media sector is perceived as too political. This paper has attempted to help build this bridge. We believe that the evidence should compel action, and are trying to expand understanding and improve interventions, pushing the frontier of current research and practice.

Recommendations

1. **Strengthen the link between research and aid policy.** It's time to put into policy, at a strategic level, what research has found about media, governance, and development. The research presented in this paper is new, but it stands on the shoulders of a whole body of work that has been long unknown or ignored in the policy realm. The degree of media's importance in development and governance should be appropriately reflected in the policy of aid agencies and organizations.
2. **Donors should invest in learning from what they do.** This research points to gaps in our understanding of how to put the principles in place as policy and adequately diagnose and treat the situation on the ground. Donor organizations and international NGOs need to improve diagnostics, analysis, information-sharing in multiple directions, and learning as a community of practice. For example, research shows that the sector needs professionalization. But how? Despite years of policy papers decrying the ineffectiveness of short-term trainings, they are still being funded on a large scale. Even long-term training by itself does not professionalize the media sector, because of a host of contextual factors at play. With better processes of reflection and feedback, this lesson could have truly been learned a long time ago.
3. **Support the health of the media sector overall,** not along thematic lines, and in the end a healthy media sector will in turn support the thematic areas donors care about anyway (health, elections, etc.). This means improving both journalistic practices and the context in which journalists practice.
4. **Let countries drive media development.** There is plenty of evidence that local actors adapt their missions to suit donor priorities and goals, plenty of resentment stemming from feelings of not being treated as partners in the development process, and plenty of examples of organizations gaming the system and in fact, becoming dependent on donor funds. African countries have not taken ownership of the process of media development, perhaps because of the strong focus on thematic areas that are priorities for the donors, rather than support for the media as a good unto itself. The trick is, how to encourage governments to support aid to a sector that may criticize them?
5. **Donors need to work directly with governments** on improving the health of the media sector and improving their development and governance. "Donors should exert 'soft pressure' on aid recipient governments to uphold rights to freedom of information and expression and respect for the rule of law through diplomatic channels and, where possible, impose conditionality on aid. The strongest point from the DRC report is that beneficiaries of media support in Africa can't help but notice the hypocrisy of donors who, on the one hand support and lobby for human rights of journalists and on the other, prop up corrupt, kleptocratic and repressive regimes (such as the DRC) because it is geo-politically expedient to do so."⁶⁰
6. **Country-specific processes of implementation are essential.** Letting processes be driven by recipient countries also means sharing research and identified areas of need in order to come to agreement on where to focus. Business practices and professionalization were among the key themes identified as areas for attention both in the macro analysis and at the country level. But

⁶⁰ Mary Myers, personal communication, January 1, 2012.

how these challenges play out in each country is different, as is the host of other problems in the media surrounding them, such as political capture of the media. Even within each country, approaches will need to be adapted, particularly given differences in urban and rural areas.

7. **Improve donor coordination for media development**, taking a cue from the GIBM group in DRC and donor coordination in other sectors that are formally recognized as such.
8. **Focus on improving business practices and professionalization of the media sector in Sub-Saharan Africa.**
 - a. Liberalization in Africa seems to have a huge impact in growing the media, but unregulated growth can bring concentrations of ownership. More difficult, but equally important, are issues of non-transparency of ownership and the use of media for political purposes.
 - b. The needs on the business side are diverse, from management skills transfer, to the democratic regulation, formalization, and structure of the industry itself, to improving the collection and use of market and audience data. Sustainability must focus on the sector as a whole, not just on individual businesses.
 - c. The management capacities of media organizations can be improved if donors cultivate and require administrative and financial capacity. “Thanks to the demands made by donors and partners, we have really learned how to manage a media outlet,” says Godefroid Bwiti, the director of InterCongo Media press agency, in DRC.⁶¹ Once media operate as better businesses, they in theory should be able to pay salaries that enable journalists to resist bribery, and thus help support the professionalization of journalism as well.
 - d. On the question of sustainability, some organizations (particularly community radio) may be worth supporting even if they will never be self-sustaining because of the critical role that they fulfill in their communities. Public radio and community radio in the developed world are not self-sustaining either, yet are still considered of value as a public good.
 - e. Short-term trainings, thematically based trainings, and trainings without a focus on the broader enabling environment may improve the practice of some individuals, but do not professionalize the sector. Africa needs support for its journalism schools, and long-term training, together with improvements in the enabling environment.
9. **All media development initiatives should be linked to other, related development initiatives**, and to the country context. For example, to support the professionalization of journalism, the development community needs to consider literacy, education, and problems that threaten the livelihood of journalists and other media professionals – like low wages, poor working conditions, and violence.
10. **Africans are more engaged in news than the rest of the world, and they are very engaged with radio and mobile.** Consider how to leverage these traits in improving the media.
11. **Improve media data collection** in Africa. Currently it is challenging to get a holistic perspective of the media sector. Market and audience research is particularly scarce, even for purchase.

⁶¹ Personal communication, March 2011.

Donors could fund data collection, not just of their own projects, but to further the business of media overall. This would support the media industry, add to the information about the media sector, and enable donors to track their own progress.

12. **Freedom of the press matters** but can't be isolated from or solely responsible for other development improvements. Literacy, a free press, and democracy can create a virtuous cycle that lays the ground for improvements in governance, and thus development overall.
13. **Improving access to information will improve development outcomes**, the research has shown. There is also an **ethical argument for supporting the media (which is at the heart of development arguments as well) – the human right to information and self-determination**. These things are harder to measure but are clearly linked to a healthy media sector, and thus, to development.
14. New democracies without a free press should pay particular attention early on to **supporting press freedom**, in order to increase the durability of democracy.
15. The finding that media independence and reach together apparently have a greater impact on the political risk level of a country means that **a holistic approach to media sector development is critically important**, both in terms of research and practice. Because countries that have higher political risk are likely to become more stable by making their media sector more effective, strengthening the media sector is an important strategy for politically unstable countries. In terms of policy, **establishing a healthy media sector can be seen as a starting point for achieving political stability in a country**. Given what we have seen in the case studies, this must be done through building the political commitment of governments to free press, better access to information, the rule of law, and elimination of corruption.

Further research

This synthesis report suggests several directions for further research. We need a better understanding of the dynamics within individual countries regarding access to information, freedom of the media, and political stability. We also need case studies of effective donor pressure on governments to transform the media sector, and how the culture of a media system does (or does not) transform from politically driven to independent and neutral. Better and more data on African media sectors would by itself trigger many rich areas of research. The question of quality content, from a cross-cultural perspective, should be examined, and the creation of a quality index should be considered. Lastly, it would be useful to gain an understanding of how citizens in different context interact with information ecosystems, what information means to them, what they trust and how they use it. All of these paths for research would help us to better unlock media's potential to play a key role in strengthening development and governance in Sub-Saharan Africa.

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Data sources

Table 1. Data sources	
Measure	Data Source
Freedom of Press	Freedom House
Net Official Development Assistance	World Bank World Development Indicators (WDI), 2010
Cost of starting a business	IFC/World Bank Doing Business report
Average of recovery rate (cents on the dollar), closing a business	IFC/World Bank Doing Business report
Difficulty of hiring index	IFC/World Bank Doing Business report
Cost (% of claim), enforcing contracts	IFC/World Bank Doing Business report
Capital account openness	Chinn-Ito Index
Adult literacy rate	UNESCO
Government effectiveness	World Bank Worldwide Governance Indicators (WGI), 2009
Polity 2	Polity IV Database
Regulatory quality	WGI, 2009
Rule of law	WGI, 2009
Control of corruption	WGI, 2009
Political stability and the absence of violence	WGI, 2010
Democratic accountability	PRS International Country Risk Guide database
Media sustainability	Media Sustainability Index, IREX
Advertising expenditure, top 15 Sub-Saharan	Balancing Act

African markets	
Audience research	Broadcasting Board of Governors / InterMedia
ICT Development Index	International Telecommunications Union
Households with radio (%)	WDI, 2010
Fixed Internet subscribers (per 100 people)	WDI, 2010
Telecom investment (as % of revenue)	WDI, 2010
Mobile subscribers (per 100 people)	WDI, 2010
GDP per capita (US \$ constant)	WDI, 2010
Population density	WDI, 2010
Trade openness	WDI, 2010
Urbanization	WDI, 2009
Fuel exports as a per cent of merchandise exports	WDI, 2009
Road density (km of road per 100 sq. km of land)	WDI, 2010
Electric power consumption (kwh) per capita	WDI, 2010

Table 2. Data used in S. Roy, “Media Development and Political Stability in Sub-Saharan Africa”	
Measure	Data Source
Political Risk Index	International Country Risk Guide database
Freedom of Press	Freedom House
Household with radio (%)	World Bank World Development Indicators (WDI), 2010
Fixed internet subscribers (per 100 people)	WDI, 2010
Telecom inv. (as % of revenue)	WDI, 2010
Mobile subscribers (per 100 people)	WDI, 2010
GDP per capita (US \$ constant)	WDI, 2010

Population density	WDI, 2010
Trade openness	WDI, 2010
Adult literacy rate	WDI, 2010
Road density (km of road per 100 sq. km of land)	WDI, 2010
Electric power consumption (kwh) per capita	WDI, 2010
Polity 2	Polity IV Database
Share of primary exports to GNP (1980 value)	Sachs and Warner database

Appendix I

Methodology overview

This paper draws on various strands of statistical and econometric research for several public presentations related to the Media Map Project, and an econometric study. Sanjukta Roy performed the majority of the quantitative research referenced here. This analysis was performed with already existing quantitative data. With the exception of two data sources, all of the data we used is publically available. A full list of data sources can be found in the References section. We have converted that data into a more accessible format for exploration and analysis, provided descriptions of how each dataset was produced, and linked to the original sources on the project website, www.MediaMapResource.org.⁶² Roy's original econometric study, with a detailed description of methodology and results, is also available on the site.

In addition to this quantitative research, this paper also incorporates key findings from the three Media Map country cases studies in African countries: Democratic Republic of the Congo (DRC) by Marie Soleil Frère, Kenya by Katharine Reed Allen and Iginio Gagliardone, and Mali by Heather Gilberts. The country case studies employed mainly qualitative research, based on a desk study and fieldwork. The case studies examine the impact of donor interventions supporting the media in these countries. The key questions focus on the last two decades: who were the major actors? What were the major activities? Which approaches have had a positive impact? Which failed? Why? The studies offer evidence for donors on how to improve the effectiveness and relevance of their media support. The full reports from these and the other four case studies (Cambodia, Indonesia, Peru, and Ukraine), including a discussion of methodology, are also available on the project website.

⁶² The philosophy driving this project adheres to the principles of collaboration and open data, but any data on the media sector that it is possible to monetize is more difficult to make public. One proprietary dataset that we used is Top 15 Advertising Markets in Africa, which we purchased from Balancing Act to use for analysis. The other dataset we synthesized from approximately 50 different audience research studies from the Broadcasting Board of Governors (BBG), conducted by InterMedia. The BBG kindly gave Media Map access to its most recent surveys for analysis in our work. It is unclear at this juncture whether or not we will be able to make the raw data available to the public.

Appendix II

Economic growth in Africa

Economic growth rates are one conventional measure to assess the development of countries. However, the middle-income countries in Africa have the most sluggish growth rates, and countries with high growth rates do not necessarily have equivalent growth in development; for example, in Sudan, oil production and exports have driven growth, but political instability and development challenges abound.

It is important to note, however, that just looking at growth rates does not tell the whole story of economic development. The region has experienced, and is projected to continue to experience, some of the highest growth rates worldwide (see Figure A).⁶³ While this is encouraging, growth by itself does not automatically ensure equal distribution of wealth, or broader human development.



Figure A

While GDP per capita growth rate has shown overall growth in Africa since 1990, there has been no significant improvement in human development (represented in Figure B by the Human Development Index), supporting the argument that growth alone does not ensure development in Sub-Saharan Africa

⁶³ Chart sourced on January 6, 2011 from http://www.economist.com/blogs/dailychart/2011/01/daily_chart.

(see Figure B).⁶⁴ The graph also illustrates the steady, if marginal improvement in human development, which does not appear to be subject to the same fluctuations as economic growth.

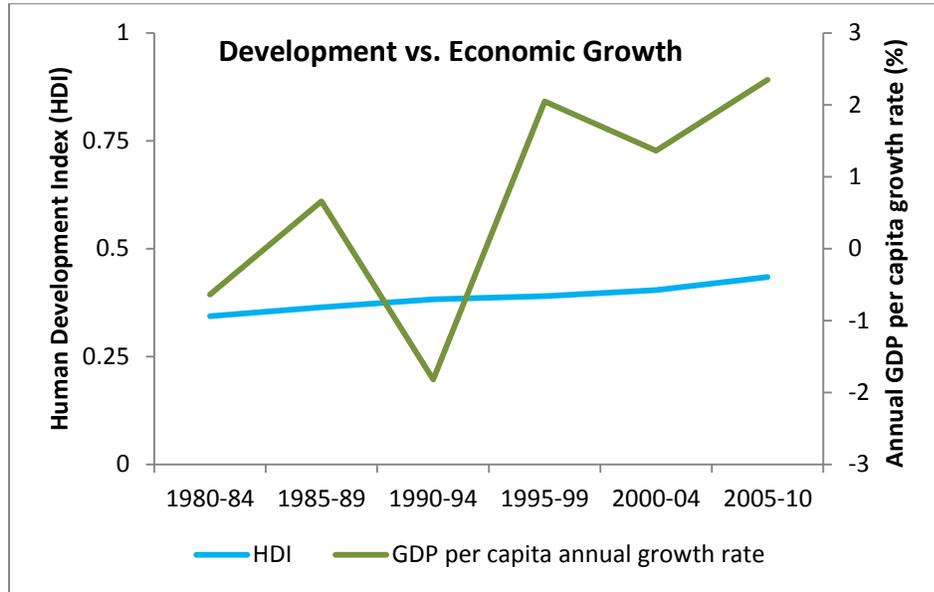


Figure B

⁶⁴ Data used for the chart GDP per capita annual growth rate, available at <http://data.worldbank.org/>; UNDP's Human Development Index, available at <http://hdr.undp.org/en/statistics/>; chart produced by Sanjukta Roy.