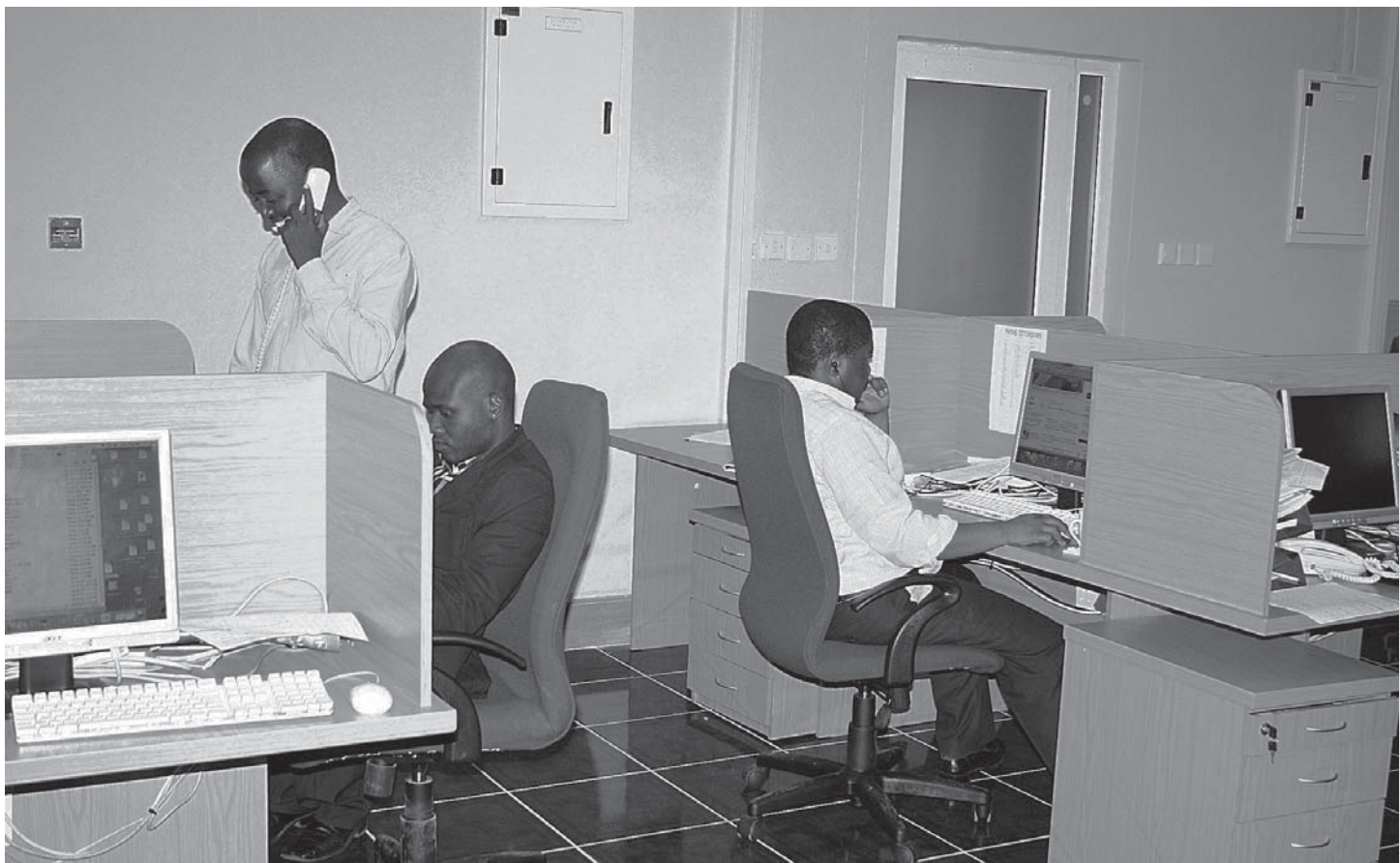

The fourth annual study by the Media Sustainability Index (MSI) of African countries expanded slightly in 2010, growing from 40 to 41 countries with the first inclusion of Angola.



I am pleased to introduce the 2010 Africa Media Sustainability Index (MSI), the fourth such study of the region. The MSI provides an analysis of the media environment in 41 countries of Sub-Saharan Africa during 2010 and also shows trends in the media sector since 2006/2007. The MSI was first conceived in 2000 and launched in Europe and Eurasia in 2001, in cooperation with the United States Agency for International Development (USAID). Since that time, it has become a universally recognized reference for benchmarking and assessing changes in media systems across Africa, Europe and Eurasia, and the Middle East.

The MSI allows policymakers and implementers to analyze media systems and determine the areas in which media development assistance can improve citizens' access to news and information. Armed with knowledge, citizens can help improve the quality of governance through participatory and democratic mechanisms, and help government and civil society actors devise solutions to pervasive issues such as poverty, healthcare, conflict, and education.

The MSI also provides important information for the media and media advocates in each country and region. The MSI reflects the expert opinions of media professionals in each country and its results inform the media community, civil society, and governments of the strengths and weaknesses of the sector. IREX continues to encourage professionals in their vital efforts at developing independent and sustainable media in their own countries or, in many cases, preserving alternative voices in the face of repressive governments.

IREX would like to thank all those who contributed to the publication of the Media Sustainability Index 2010. Participants, moderators, authors, and observers for each country, listed after each chapter, provided the primary analysis for this project. At IREX, Leon Morse managed the MSI with editorial assistance from Dayna Kerecman Myers and Evan Tachovsky. USAID has been a consistent supporter of the MSI, helping to develop the project and ensure its ongoing implementation.

We hope you will find this report useful, and we welcome any feedback.

Sincerely,



W. Robert Pearson
President, IREX

The news is strangled by lack of financing as much as by political intervention. Earlier MSI Africa studies underscored the imperative of shoring up sources of independent funds for the media, strengthening business management and developing a diverse advertising base.



The fourth annual study by the Media Sustainability Index (MSI) of African countries expanded slightly in 2010, growing from 40 to 41 countries with the first inclusion of Angola. The picture of the Angolan media sector painted by the panelists there stands in stark contrast to the oil wealth generated by the country. Years after the loosening of the media environment from the grip of a Marxist government, the government has licensed only a handful of private broadcasters and a wide gap exists between constitutional guarantees of media freedom and the day-to-day reality faced by working media professionals. Self-censorship prevails in newsrooms. Like so many of its neighbors, Angola's non-state media outlets suffer from anemic revenue streams, with a shallow advertising market and no tradition of market research. Also like many of its neighbors, Objective 5, supporting institutions, drew the highest scores from panelists, even if not quite breaking out of the "unsustainable, mixed system" score category.

Notable Country Developments

Elsewhere in Africa, many countries showed little change in overall score. Of the 40 countries studied last year, 26 moved up or down by less than a tenth of a point. The continental average remained 1.89, although Objective 2, professional journalism, edged up to 1.84 from 1.81 while Objective 4, business management, slid to 1.64 from 1.67.

It was a momentous year for Sudan, as South Sudan looked forward to a referendum in 2010 expected to ensure its independence. The panelist noted that all sharia laws are applicable only in the north; they no longer apply to the south. However, the SPLM government is busy drafting media laws likely to be similar to those used by the Khartoum government—a point of concern for some panelists.

Other countries, such as Senegal, reported progress. With thawing tensions between the media and the government in 2010, boosted by a new press code, violence against and intimidation of journalists decreased significantly. Although at the time the MSI was prepared, the Senegalese Parliament had not yet voted on the code, its provisions decriminalize libel, improve access to information, and are expected to stimulate the production of more local content. Interestingly, the new code also addresses the financial disadvantages that plague the independent media, steering at least 70 percent of the advertising from public companies to the private media.

Eritrea, which has no independent media presence at all, it is challenging to even obtain enough information to assess the media, requiring a modified approach for the MSI. Djibouti and Zimbabwe do not have any registered independent broadcast media.

Another West African country, Ghana, is also moving inexorably closer to sustainability on the MSI scale. The MSI panelists cited the strength of Ghana's media legislation and supporting regulations for creating the proper foundation for a pluralistic and sustainable media, for an overall progressive verdict on the MSI scale.

Kenya's panelists reported progress as well, noting that a new draft constitution, if endorsed, could correct the previous failure to include press freedom alongside the freedom of expression. However, as is the case in many other countries across the continent, other restrictive laws prohibit freedom of speech and of the press, giving the state security forces a tool to bypass the constitution and muzzle opposition voices. For example, the controversial Communications Amendment Bill of 2008, which was highly contested by journalists and media owners, remains in force, with no changes in the offending provisions. The government enacted the Communications Amendment Bill into law over strong objections by journalists and media owners, giving excessive powers to the Minister of Internal Security to raid media houses and seize equipment in "emergency" situations.

There are still countries with little independent media at all to assess. Eritrea, which has no independent media presence at all, it is challenging to even obtain enough information to assess the media, requiring a modified approach for the MSI. Djibouti and Zimbabwe do not have any registered independent broadcast media. On a positive note, the Zimbabwe Media Commission at last moved to register 15 new media outlets and independent newspapers, among them four dailies, bringing to an end a seven-year monopoly of the daily print media market by the state-controlled Zimpapers.

In other countries that allow a little more breathing room for the media, political turmoil nonetheless continues to hold back the media. For example, MSI scores for Madagascar, which has not recovered politically or economically from the violent protests and political crisis of 2009, sank in all objectives.

Some of the most striking changes came from three countries, and unfortunately these have been negative changes. Rwanda slid into the "unsustainable, mixed system" category; Zambia, which had once been in the "near sustainability" bracket, continued losing ground; and Burundi's freedom of speech score slid into the "unsustainable, mixed system" range for the first time.

Rwanda's political landscape is contentious and opposition media are vocal in their criticisms of the Kagame government. There is little doubt that in this atmosphere the media representing each side oversteps lines of professionalism and ethics. Objective journalism is clearly not the goal of most political reporting. Nonetheless, non-objective political content in the media is still worthy of protection under the umbrella of freedom of speech. The falling scores, particularly in Objective 1, freedom of speech, are commensurate with and directly related to actions taken by the government against its critics in the media. If the government is interested in improvements in journalism quality, it is in their interest to strengthen their commitment to the spirit of free speech and free media enshrined in their constitution. Oppressive measures—closing media outlets or barring their reporters from government press conferences—will not achieve better media content. Such measures, at best, rather serve to create an obedient media, not one able to independently create content that meets international standards of professionalism.

Rwanda's neighbor to the south, Burundi, also suffered lower scores as a result of animosity between the government and the media. After controversial municipal elections in May 2010, the head of the National Communications Council accused the media of "inflaming the country by their reporting and siding with the opposition by helping them to dispute the elections." A short time later a senior staffer at an online newspaper was charged with treason and jailed for several months. Like Rwanda, until this year Burundi had in all previous studies scored in the "near sustainability" range for freedom of speech, even if somewhat behind its northern neighbor. This year it slid to 1.85.

The deteriorating situation in Zambia, which has been reported by the MSI for a few years now, continued to become worse. Zambia's free speech score fell slightly, but kept the country on a downward trajectory from its opening high of 2.03 in 2006/2007. Likewise, its overall score has fallen to 1.77 from 2.25 in the initial study.

With elections in 2011 looming, the government of Zambia displayed a similar attitude toward the media as in Rwanda and Burundi. Politicians levied public condemnations of

both public and private media for favoring rivals. The government claims that media self-regulation has failed and uses that as grounds to consider legislation that would curb the media. A long-stagnant piece of legislation, the Independent Broadcasting Act, was passed in 2002 that promised to strengthen the independence of public media and protect private media; key provisions, however, were not implemented. In 2010 amendments were proposed that would severely weaken the ability of that law to achieve its stated aim; in fact it would do the opposite and entrench politicization of public media there. Coupled with a similar stagnation of freedom of information legislation, panelists' pessimism increased this year that relief for Zambia's media is in sight.

A Crisis in Funding and Business Management

In so many countries in Africa, financing and media management is the weak link, threatening sustainability and independence. With four years of tracking the business side of media health as well as the political and professional features, it is clear that business management and sources of funding for the media, measured by Objective 4 in the MSI, is the missing foundation for many other aspects of media health, such as professional standards (measured by Objective 2 of the MSI). The news is strangled by lack of financing as much as by political intervention. Earlier MSI Africa studies underscored the imperative of shoring up sources of independent funds for the media, strengthening business management and developing a diverse advertising base.

Even in the DRC, where panelists recalled several cases where journalists were assassinated, threatened, or arrested and discussed the difficulties foreign media face in a consistently tainted and unsafe environment, a look at the compiled scores from all panelists show that the weakest link in the Congolese media system is the financial instability of press companies. Most Congolese journalists are either badly paid or not paid at all due to the economic precariousness of their employers—making them sitting ducks for manipulation and corruption.

Examining the financial side of the media in Burundi reveals another common problem incompatible with sustainability: dependence on outside donors. In Burundi, MSI panelists reported that the overwhelming majority of radio stations could not survive without external financial support. Most were created using international funds, and some are entirely financed from abroad. They concluded that if the lack of a developed advertising industry is not addressed, the media has little hope of reversing this trend.

Oppressive measures—closing media outlets or barring their reporters from government press conferences—will not achieve better media content. Such measures, at best, rather serve to create an obedient media, not one able to independently create content that meets international standards of professionalism.

These warnings are particularly relevant to Senegal, which is on such a promising media sustainability trajectory in so many other aspects, anticipating significant legislative improvements. Yet poor management practices at many media businesses, coupled with the global economic crisis, have pushed many outlets to the brink of financial disaster. Many panelists blame poor management; one reported that Senegal has accountants and financial experts capable of managing media businesses effectively, but even if media companies employed experts, they would not have much room to do their jobs. Press owners treat media outlets as their personal pockets; they can just take out cash as they please, regardless of standard management rules. This problem has the potential to undo the positive strides Senegal has made; if the media are not well managed and financially secure then sustainability and editorial independence is not possible in the best political and legislative context.

Some countries did report progress on this front. Positive advertising trends were identified in Sudan, in the North. True advertising is well developed there, attracting many new companies to buy advertisements. Many media houses have full-fledged advertising departments that bring in revenue. There are signs that this effect could help South Sudan, where advertising remains low, but there are signs of a growing appreciation of the importance of advertising to a healthy media. Other countries, like Madagascar, have fairly well managed media, but not to the point of guaranteeing their editorial freedom.

On a related note, few countries offer training for media managers, but this is changing in DRC. The École Supérieure de Journalisme de Lille is offering a degree of Master of Management to a few media managers in Kinshasa.

Panelists in Nigeria argued that social networking sites and new media have brought a certain degree of independence to reporting that is unprecedented in the country, bringing to the public's attention issues that the traditional media cannot or do not cover through these platforms.

New Media Use Continues to Grow, but does Access?

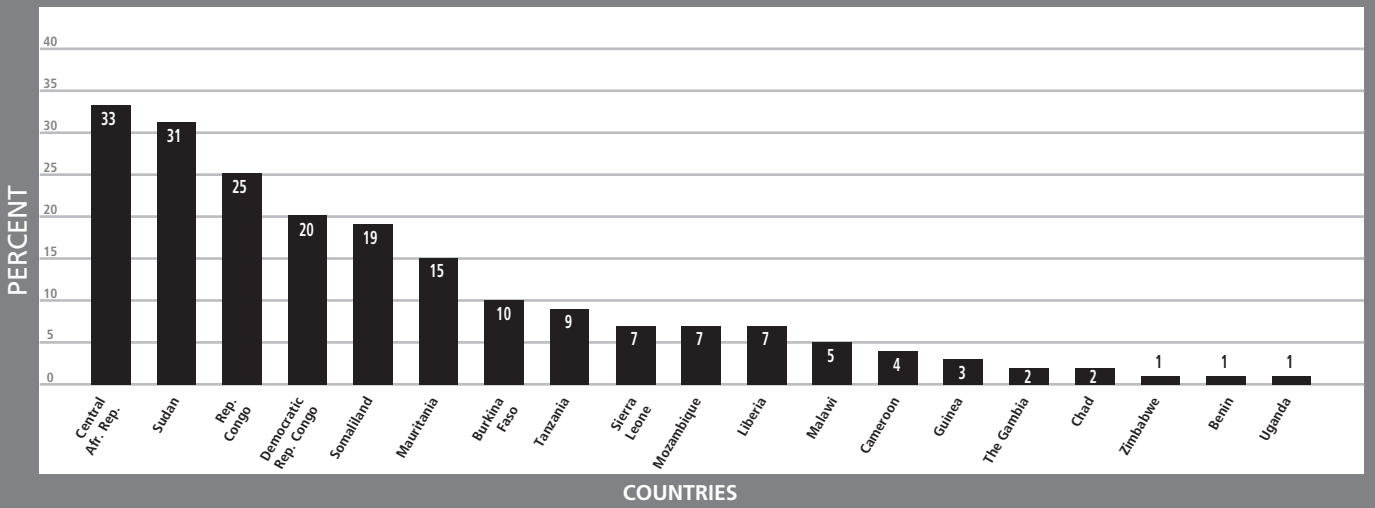
In many countries across the continent, from Kenya, where Internet facilities are spreading beyond the main cities, to Mauritania, where there is not a single press newsroom without access to the web, online media and news blogs continue to grow. Even in Ethiopia, where Internet access remains low and the government actively filters and blocks sites it deems threatening, bloggers and online journalists within and beyond Ethiopia's borders are providing alternative news sources and fueling political debate. A small but growing number of Ethiopians are tapping social media websites as a method to exchange information, as well.

In Sudan, MSI panelists revealed that Internet use for information has increased, especially in the North, where the rates are relatively low, although the government filters and blocks some sites. In the South, it is mainly available in the city and big towns, and the cost is prohibitive. Other news and information sources like blogs, SMS platforms for news alerts, Twitter, YouTube, Facebook exist in Sudan—and people depend on them.

Similarly, Nigerians now rely heavily on social networking tools for information sharing. Panelists in Nigeria argued that social networking sites and new media have brought a certain degree of independence to reporting that is unprecedented in the country, bringing to the public's attention issues that the traditional media cannot or do not cover through these platforms. Citizen journalists are also stepping in to fill in the gaps in reporting; as one panelist said, "pushing and stretching the elasticity of traditional media more than ever and challenging their status quo, offering the missing link and an informed eyewitness account."

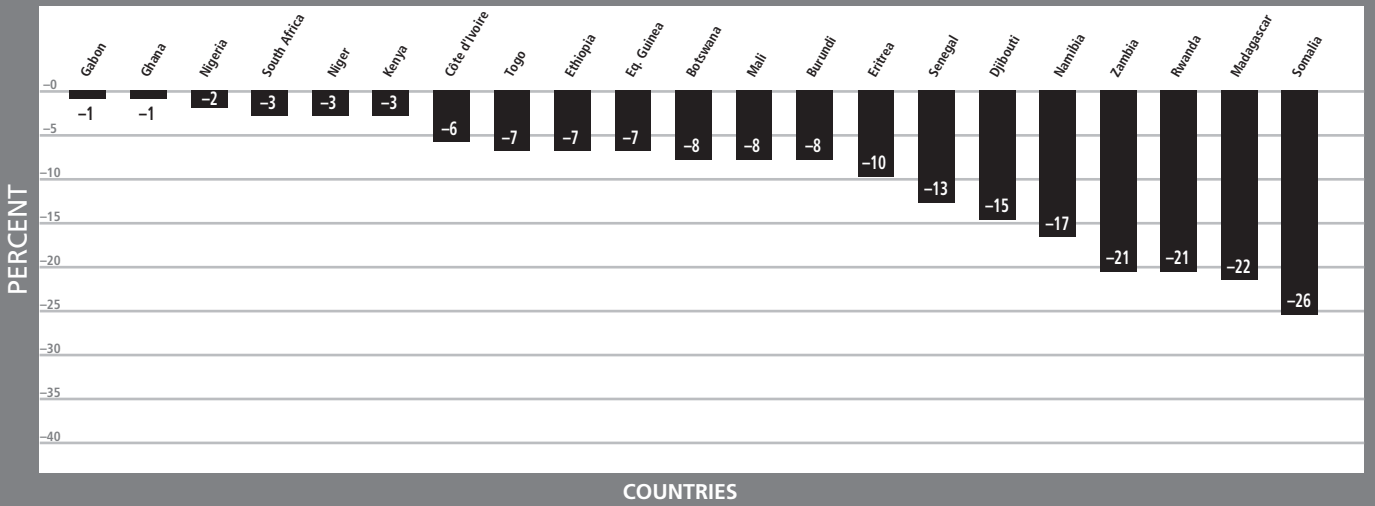
However, it is clear across the continent that access remains uneven, highlighting the gaps between rural and urban, literate and illiterate, and rich and poor consumers. Language is an obstacle for some, as well; for example, panelists from Namibia called for more localization of content on the Internet, especially translating content to local languages.

PERCENT CHANGE GAINS IN MSI 2006–2010: AFRICA



Data for Angola will be included in this chart in future editions once three years of data are available.

PERCENT CHANGE LOSSES IN MSI 2006–2010: AFRICA



Data for Angola will be included in this chart in future editions once three years of data are available.

MEDIA SUSTAINABILITY INDEX 2010: OVERALL AVERAGE SCORES

□ Eritrea (0.24)	□ Eq. Guinea (0.94)	□ Djibouti (1.21)	□ Ethiopia (1.15)	□ Somalia (1.25)	▲ Zimbabwe (1.29)	□ Angola (1.57)	▼ Burundi (1.97)	□ Cameroon (1.78)	□ Cent. Afr. Rep. (1.64)	□ Chad (1.89)	▲ D.R. Congo (1.80)	▲ Rep. Congo (1.77)	▼ Gabon (1.79)	□ The Gambia (1.66)	▼ Madagascar (1.68)	▼ Mali (1.99)	□ Mauritania (1.54)	□ Niger (1.92)	□ Rwanda (1.81)	□ Sudan (1.68)	□ Togo (1.62)	▼ Zambia (1.77)	□ Benin (2.30)	▲ Botswana (2.31)	▼ Burkina Faso (2.11)	□ Côte d'Ivoire (2.08)	▲ Guinea (2.32)	□ Kenya (2.31)	▲ Liberia (2.18)	□ Malawi (2.30)	□ Mozambique (2.36)	□ Namibia (2.40)	□ Nigeria (2.18)	□ Senegal (2.06)	□ Sierra Leone (2.09)	▲ Somaliland (2.18)	□ Tanzania (2.41)	□ Uganda (2.43)	▲ Ghana (2.55)	□ South Africa (3.01)	
0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00																																		
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM				NEAR SUSTAINABILITY				SUSTAINABLE																															

MEDIA SUSTAINABILITY INDEX 2010: FREE SPEECH

□ Eritrea (0.07)	▲ Zimbabwe (0.80)	▼ Djibouti (1.33)	□ Eq. Guinea (1.04)	□ Ethiopia (1.28)	□ Somalia (1.35)	□ Angola (1.53)	▼ Burundi (1.85)	□ Cameroon (1.92)	▼ Cent. Afr. Rep. (1.92)	▲ Chad (1.93)	▲ D.R. Congo (1.84)	▲ The Gambia (1.62)	▼ Madagascar (1.58)	▲ Mauritania (1.55)	▼ Nigeria (1.79)	▼ Rwanda (1.88)	□ Sudan (1.66)	□ Zambia (1.85)	▼ Benin (2.42)	▼ Botswana (2.08)	▼ Burkina Faso (2.34)	▲ Rep. Congo (2.09)	□ Côte d'Ivoire (2.21)	▲ Gabon (2.05)	□ Guinea (2.37)	▲ Kenya (2.24)	▲ Liberia (2.42)	□ Malawi (2.21)	□ Mali (2.30)	▲ Niger (2.11)	□ Senegal (2.02)	▲ Sierra Leone (2.25)	▲ Somaliland (2.29)	▲ Tanzania (2.38)	▲ Togo (2.10)	□ Uganda (2.27)	▲ Ghana (2.67)	▲ Mozambique (2.73)	▲ Namibia (2.53)	□ South Africa (2.99)
0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00																																	
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM				NEAR SUSTAINABILITY				SUSTAINABLE																														

CHANGE SINCE 2009

▲ (increase greater than .10) □ (little or no change) ▼ (decrease greater than .10)

Annual scores for 2006 through 2010 are available online at http://www.irex.org/system/files/Africa_msiscores.xls

MEDIA SUSTAINABILITY INDEX 2010: PROFESSIONAL JOURNALISM

▲ Eritrea (0.45)	□ Djibouti (1.35) ▲ Eq. Guinea (1.11) ▼ Ethiopia (1.12) ▼ Somalia (1.25) ▲ Zimbabwe (1.40)	□ Angola (1.70) ▼ Burkina Faso (1.93) □ Cameroon (1.84) ▼ Cent. Afr. Rep. (1.56) ▲ D.R. Congo (1.62) ▲ Rep. Congo (1.69) ▲ Côte d'Ivoire (1.85) ▼ Gabon (1.84) □ The Gambia (1.99) ▲ Liberia (1.96) □ Madagascar (1.68) ▼ Mali (1.81) □ Mauritania (1.51) ▼ Niger (1.73) ▼ Nigeria (2.00) ▼ Rwanda (1.70) □ Senegal (1.99) □ Sierra Leone (1.86) ▲ Sudan (1.75) ▲ Togo (1.57) ▼ Zambia (1.57)	▲ Benin (2.26) ▲ Botswana (2.37) ▼ Burundi (2.17) ▼ Chad (2.02) ▲ Ghana (2.17) □ Guinea (2.18) ▲ Kenya (2.28) □ Malawi (2.41) □ Mozambique (2.07) □ Namibia (2.20) ▲ Somaliland (2.02) □ Tanzania (2.25) ▲ Uganda (2.20)	□ South Africa (2.88)			
0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE	

MEDIA SUSTAINABILITY INDEX 2010: PLURALITY OF NEWS SOURCES

□ Eritrea (0.24)	□ Eq. Guinea (0.90)	▼ Burkina Faso (1.96) □ Cameroon (1.90) □ Cent. Afr. Rep. (1.85) ▲ Chad (1.98) ▼ Gabon (1.85) □ The Gambia (1.52) ▼ Madagascar (1.61) ▲ Mauritania (1.68) □ Niger (1.97) □ Angola (1.46) □ Djibouti (1.21) ▲ Ethiopia (1.29) ▲ Zimbabwe (1.03)	▼ Rwanda (1.99) ▲ Somalia (1.60) ▲ Sudan (1.89) ▼ Zambia (1.76)	▲ Botswana (2.44) ▼ Burundi (2.10) ▼ D.R. Congo (2.09) ▲ Rep. Congo (2.14) □ Côte d'Ivoire (2.23) ▲ Guinea (2.42) ▲ Kenya (2.35) ▲ Liberia (2.29) ▼ Malawi (2.15) ▼ Mali (2.22) □ Namibia (2.27) □ Nigeria (2.25) ▼ Senegal (2.11) □ Sierra Leone (2.27) ▲ Somaliland (2.31) □ Tanzania (2.38) ▲ Togo (2.05)	□ Benin (2.64) ▲ Ghana (2.80) □ Mozambique (2.63) ▲ South Africa (2.98) □ Uganda (2.58)		
0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE	

CHANGE SINCE 2009

▲ (increase greater than .10) □ (little or no change) ▼ (decrease greater than .10)

Annual scores for 2006 through 2010 are available online at http://www.irex.org/system/files/Africa_msiscores.xls

MEDIA SUSTAINABILITY INDEX 2010: BUSINESS MANAGEMENT

		<ul style="list-style-type: none"> □ Angola (1.24) ▼ Benin (1.49) ▲ Cameroon (1.37) □ Chad (1.45) ▲ D.R. Congo (1.32) ▲ Rep. Congo (1.12) □ Djibouti (1.01) ▼ Ethiopia (1.16) ▼ Gabon (1.46) □ The Gambia (1.37) □ Cent. Afr. Rep. (0.96) ▲ Eq. Guinea (0.91) □ Somalia (0.86) □ Eritrea (0.15) 	<ul style="list-style-type: none"> ▼ Burkina Faso (1.78) □ Burundi (1.57) ▼ Côte d'Ivoire (1.85) ▲ Liberia (1.73) ▼ Madagascar (1.73) □ Mali (1.59) ▼ Niger (1.55) ▼ Rwanda (1.60) ▼ Senegal (1.69) □ Sierra Leone (1.60) ▼ Mauritania (1.21) ▼ Sudan (1.47) ▼ Togo (1.09) ▲ Somaliland (2.00) ▼ Zambia (1.53) ▲ Zimbabwe (1.67) 	<ul style="list-style-type: none"> □ Botswana (2.17) ▲ Ghana (2.36) ▲ Guinea (2.20) ▼ Kenya (2.42) ▲ Malawi (2.23) ▼ Mozambique (2.11) □ Namibia (2.41) ▲ Nigeria (2.14) □ Tanzania (2.28) ▲ Uganda (2.49) □ South Africa (3.08) 			
0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE	

CHANGE SINCE 2009

▲ (increase greater than .10) □ (little or no change) ▼ (decrease greater than .10)

Annual scores for 2006 through 2010 are available online at http://www.irex.org/system/files/Africa_msiscores.xls

MEDIA SUSTAINABILITY INDEX 2010: SUPPORTING INSTITUTIONS

				▲ Botswana (2.49)			
				□ Burundi (2.17)			
				□ Chad (2.07)			
				▲ D.R. Congo (2.12)			
			□ Angola (1.91)	□ Côte d'Ivoire (2.26)			
			▼ Cameroon (1.86)	▲ Guinea (2.42)			
			□ Cent. Afr. Rep. (1.91)	▼ Kenya (2.27)			
			▲ Rep. Congo (1.79)	□ Malawi (2.49)	▼ Benin (2.69)		
			▼ Gabon (1.76)	▼ Mali (2.05)	▼ Burkina Faso (2.54)		
			□ The Gambia (1.80)	▼ Mozambique (2.28)	▲ Ghana (2.77)		
			▼ Madagascar (1.81)	□ Niger (2.23)	▲ Liberia (2.51)		
			□ Mauritania (1.72)	□ Senegal (2.48)	□ Namibia (2.59)		
		□ Djibouti (1.13)	▼ Rwanda (1.87)	▲ Sierra Leone (2.48)	□ Nigeria (2.70)		
	□ Eq. Guinea (0.72)	▼ Somalia (1.16)	▲ Sudan (1.61)	▲ Somaliland (2.26)	▲ Tanzania (2.75)		
▲ Eritrea (0.30)	□ Ethiopia (0.89)	▼ Togo (1.31)	▼ Zimbabwe (1.54)	▲ Zambia (2.15)	□ Uganda (2.62)		
						▼ South Africa (3.12)	
0 – 0.50	0.51 – 1.00	1.01 – 1.50	1.51 – 2.00	2.01 – 2.50	2.51 – 3.00	3.01 – 3.50	3.51 – 4.00
UNSUSTAINABLE ANTI-FREE PRESS		UNSUSTAINABLE MIXED SYSTEM		NEAR SUSTAINABILITY		SUSTAINABLE	

CHANGE SINCE 2009

▲ (increase greater than .10) □ (little or no change) ▼ (decrease greater than .10)

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Of the 40 countries studied last year, 26 moved up or down by less than a tenth of a point. The continental average remained 1.89, although Objective 2, professional journalism, edged up to 1.84 from 1.81 while Objective 4, business management, slid to 1.64 from 1.67.



IREX prepared the Media Sustainability Index (MSI) in cooperation with the United States Agency for International Development (USAID) as a tool to assess the development of media systems over time and across countries. IREX staff, USAID, and other media-development professionals contributed to the development of this assessment tool.

The MSI assesses five “objectives” in shaping a successful media system:

1. 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. Independent media are well-managed businesses, allowing editorial independence.
5. Supporting institutions function in the professional interests of independent media.

These objectives were judged to be the most important aspects of a sustainable and professional independent media system, and served as the criteria against which countries were rated. A score was attained for each objective by rating between seven and nine indicators, which determine how well a country meets that objective. The objectives, indicators, and scoring system are presented below.

The scoring is done in two parts. First, a panel of local experts is assembled in each country, drawn from the country’s media outlets, nongovernmental organizations (NGOs), professional associations, and academic institutions. Panelists may be editors, reporters, media managers or owners, advertising and marketing specialists, lawyers, professors or teachers, or human rights observers. Additionally, panels comprise the various types of media represented in a country. The panels also include representatives from the capital city and other geographic regions, and they reflect gender, ethnic, and religious diversity as appropriate. For consistency from year to year, at least half of the previous year’s participants are included on the following year’s panel. IREX identifies and works with a local or regional organization or individual to oversee the process.

Panel participants are provided with a questionnaire that explains the objectives, indicators, and scoring system. Each panelist individually reviews the questionnaire and scores each indicator. Descriptions of each indicator explain their meaning and help organize the panelist’s thoughts. For example, the questionnaire asks the panelist to consider not only the letter of the legal framework, but its practical implementation, too. A country without a formal freedom-of-information law that enjoys customary government openness may well outperform a country that has a strong law on the books that is frequently ignored. Furthermore, the questionnaire does not single out any one type of media as more important than another; rather it directs the panelist to consider the salient types of media and to determine if an underrepresentation, if applicable, of one media type impacts the sustainability of the media sector as a whole. In this way, we capture the influence of public, private, national, local, community, and new media.

The panelists then assemble to analyze and discuss the objectives and indicators. While panelists may choose to change their scores based upon discussions, IREX does not promote consensus on scores among panelists. The panel moderator, in most cases a representative of the host-country institutional partner or a local individual, prepares a written analysis of the discussion, which is subsequently edited by IREX editorial staff. Names of the individual panelists and the partner organization or individual appear at the end of each country chapter.

IREX editorial staff review the panelists' scores, and then score the country independently of the MSI panel. This score carries the same weight as an individual panelist. The average of individual indicator scores within each objective determines the objective score, and the average of the five objectives determines the overall country score.

In some cases where conditions on the ground are such that panelists might suffer legal retribution or physical threats as a result of their participation, IREX will opt to allow some or all of the panelists and the moderator/author to remain anonymous. In severe situations, IREX does not engage panelists as such; rather the study is conducted through research and interviews with those knowledgeable of the media situation in that country. Such cases are appropriately noted in relevant chapters.

I. Objectives and Indicators

LEGAL AND SOCIAL NORMS PROTECT AND PROMOTE FREE SPEECH AND ACCESS TO PUBLIC INFORMATION.

FREE-SPEECH INDICATORS:

- > Legal and social protections of free speech exist and are enforced.
- > Licensing of broadcast media is fair, competitive, and apolitical.
- > Market entry and tax structure for media are fair and comparable to other industries.
- > Crimes against journalists or media outlets are prosecuted vigorously, but occurrences of such crimes are rare.
- > State or public media do not receive preferential legal treatment, and law guarantees editorial independence.
- > Libel is a civil law issue; public officials are held to higher standards, and offended parties must prove falsity and malice.
- > Public information is easily accessible; right of access to information is equally enforced for all media and journalists.
- > Media outlets have unrestricted access to information; this is equally enforced for all media and journalists.
- > Entry into the journalism profession is free, and government imposes no licensing, restrictions, or special rights for journalists.

JOURNALISM MEETS PROFESSIONAL STANDARDS OF QUALITY.

PROFESSIONAL JOURNALISM INDICATORS:

- > Reporting is fair, objective, and well sourced.
- > Journalists follow recognized and accepted ethical standards.
- > Journalists and editors do not practice self-censorship.
- > Journalists cover key events and issues.
- > Pay levels for journalists and other media professionals are sufficiently high to discourage corruption.
- > Entertainment programming does not eclipse news and information programming.
- > Technical facilities and equipment for gathering, producing, and distributing news are modern and efficient.
- > Quality niche reporting and programming exists (investigative, economics/business, local, political).

MULTIPLE NEWS SOURCES PROVIDE CITIZENS WITH RELIABLE AND OBJECTIVE NEWS.

PLURALITY OF NEWS SOURCES INDICATORS:

- > A plurality of affordable public and private news sources (e.g., print, broadcast, Internet) exists.
- > Citizens' access to domestic or international media is not restricted.
- > State or public media reflect the views of the entire political spectrum, are nonpartisan, and serve the public interest.
- > Independent news agencies gather and distribute news for print and broadcast media.
- > Independent broadcast media produce their own news programs.
- > Transparency of media ownership allows consumers to judge objectivity of news; media ownership is not concentrated in a few conglomerates.
- > A broad spectrum of social interests are reflected and represented in the media, including minority-language information sources.

INDEPENDENT MEDIA ARE WELL-MANAGED BUSINESSES, ALLOWING EDITORIAL INDEPENDENCE.

BUSINESS MANAGEMENT INDICATORS:

- > Media outlets and supporting firms operate as efficient, professional, and profit-generating businesses.
- > Media receive revenue from a multitude of sources.
- > Advertising agencies and related industries support an advertising market.
- > Advertising revenue as a percentage of total revenue is in line with accepted standards at commercial outlets.
- > Independent media do not receive government subsidies.
- > Market research is used to formulate strategic plans, enhance advertising revenue, and tailor products to the needs and interests of audiences.
- > Broadcast ratings and circulation figures are reliably and independently produced.

SUPPORTING INSTITUTIONS FUNCTION IN THE PROFESSIONAL INTERESTS OF INDEPENDENT MEDIA.

SUPPORTING INSTITUTIONS INDICATORS:

- > Trade associations represent the interests of private media owners and provide member services.
- > Professional associations work to protect journalists' rights.
- > NGOs support free speech and independent media.
- > Quality journalism degree programs that provide substantial practical experience exist.
- > Short-term training and in-service training programs allow journalists to upgrade skills or acquire new skills.
- > Sources of newsprint and printing facilities are in private hands, apolitical, and unrestricted.
- > Channels of media distribution (kiosks, transmitters, Internet) are private, apolitical, and unrestricted.

II. Scoring System

A. Indicator Scoring

Each indicator is scored using the following system:

0 = Country does not meet the indicator; government or social forces may actively oppose its implementation.

1 = Country minimally meets aspects of the indicator; forces may not actively oppose its implementation, but business environment may not support it and government or profession do not fully and actively support change.

2 = Country has begun to meet many aspects of the indicator, but progress may be too recent to judge or still dependent on current government or political forces.

3 = Country meets most aspects of the indicator; implementation of the indicator has occurred over several years and/or through changes in government, indicating likely sustainability.

4 = Country meets the aspects of the indicator; implementation has remained intact over multiple changes in government, economic fluctuations, changes in public opinion, and/or changing social conventions.

B. Objective and Overall Scoring

The averages of all the indicators are then averaged to obtain a single, overall score for each objective. Objective scores are averaged to provide an overall score for the country. IREX interprets the overall scores as follows:

Unsustainable, Anti-Free Press (0–1): Country does not meet or only minimally meets objectives. Government and laws actively hinder free media development, professionalism is low, and media-industry activity is minimal.

Unsustainable Mixed System (1–2): Country minimally meets objectives, with segments of the legal system and government opposed to a free media system. Evident progress in free-press advocacy, increased professionalism, and new media businesses may be too recent to judge sustainability.

Near Sustainability (2–3): Country has progressed in meeting multiple objectives, with legal norms, professionalism, and the business environment supportive of independent media. Advances have survived changes in government and have been codified in law and practice. However, more time may be needed to ensure that change is enduring and that increased professionalism and the media business environment are sustainable.

Sustainable (3–4): Country has media that are considered generally professional, free, and sustainable, or to be approaching these objectives. Systems supporting independent media have survived multiple governments, economic fluctuations, and changes in public opinion or social conventions.