



# The Political Economy of Media Capture

What influences media capture in Less Developed Countries (LDCs) and how does this present opportunities and challenges for progress in achieving key components of SDG 16?

LSE Master of Public Administration (MPA) Capstone Report  
March 9<sup>th</sup> 2017

Clients: DFID, World Bank

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## Acknowledgements

*This report was produced for DFID and the World Bank as part of the Master of Public Administration (MPA) programme Capstone project. The authors are indebted to Professor Patrick Dunleavy and Dr. Brett Meyer for their guidance and academic support as well as to Dr. Alexander Hamilton (DFID) and Mr. Craig Hammer (World Bank) for their time, continued support, and guidance for this report. Thank you also to the MPA Team for always being supportive of any requests.*

*Lastly, the research contained in this report draws heavily on interviews with academic experts, local journalists, and members of civil society to whom the authors are greatly indebted. In particular, the authors would like to thank Ayaa Irene (Lead Media Development Officer for the Association for Media Development In South Sudan (AMDISS)), Deus Valentine (Advisor for the Dar es Salaam-based Foundation for Civil Society), Chris Roper (Knight Fellow with the International Center for Journalists), and Amanda Strydom (Managing Editor and Program Manager for the African Network of Centres for Investigative Reporting (ANCIR)).*

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## List of Abbreviations

ANC	African National Congress
AL	Awami League
BNP	Bangladesh Nationalist Party
BTRC	Bangladesh Telecommunication Regulatory Commission
BTV	Bangladesh Television
CA	Cybercrimes Act, 2015 (Tanzania)
CCM	Chama Cha Mapinduzi (Tanzania Party of the Revolution)
DFID	Department for International Development
FH	Freedom House
ICASA	Independent Communications Authority of South Africa
GoSS	Government of South Sudan
LDCs	Less Developed Countries
LSE	London School of Economics and Political Science
LSM	Living Standards Measure
MDDA	Media Development and Diversity Agency
MDGs	Millennium Development Goals
MSA	Media Services Act, 2016 (Tanzania)
NGO	Non-Governmental Organisation
PEA	Political Economy Analysis
RWB	Reporters Without Borders
SABC	South African Broadcasting Corporation
SSBC	South Sudan Broadcasting Corporation
SDGs	Sustainable Development Goals
SDG16	Sustainable Development Goal 16 (Good Governance)
UN	United Nations
UNMISS	United Nations Mission in South Sudan
WB	World Bank

## Executive Summary

1. This report investigates the relationship between media capture, media development, and “good governance” (SDG16) through the lens of political economy analysis specifically in four case-study countries: South Sudan, Tanzania, Bangladesh, and South Africa.
2. The authors highlight that the circulation of information in the public interest (and associated good governance outcomes) is impacted by historical and developmental factors, including country-specific socioeconomic, political and institutional circumstances. The report highlights the importance of considering that good governance is affected not only by a *captured* media but also by an *underdeveloped* media.
3. In exploring how socioeconomic, political and institutional factors impact media development and media capture, this report suggests that the availability and quality of public interest information is driven by supply- and demand-side factors that affect both the production and dissemination of news, and the ability and willingness to consume news.
4. In South Sudan, media capture, media market and audience segmentation are driven by: the ongoing civil conflict (since 2013), ethnic and linguistic divisions, a lack of rule of law, the legacy of clientelistic networks in the media and the government, a stark urban-rural divide, and a lack of infrastructure and funding that could support sustainable media development.
5. In Tanzania, media capture, and media market and audience segmentation are driven by: the dominance of the CCM that enables the government to establish a legal framework to restrict freedom of the press, stark rural-urban and Zanzibar-Mainland divides, and a lack of local and community media in rural areas due to poor infrastructure and a lack of managerial skills.
6. In Bangladesh, media capture, media market and audience segmentation are driven by: the political polarisation of the media and journalists’ unions between the dominant AL and BNP political parties, the combination of political polarisation and low journalistic professionalism preventing politically unbiased

reporting, and connections between corporate media owners and political elites that lead to politically-motivated corporate media strategies.

7. In South Africa, media capture, media market and audience segregations are driven by: the lack of sustainable funding available to independent media outlets, prohibitive costs limiting their readership to the economic elite, and the dominance of the (politically controlled) SABC as the only source of media catering to lower-income segments of the population,
8. The authors' analysis and desk research is complemented by qualitative evidence from interviews that supports the authors' proposal that good governance is determined by media underdevelopment as much as media capture through a set of interrelated factors.
9. The framework developed throughout this report motivates the authors to propose a set of policy interventions for facilitating good governance outcomes, such as: infrastructural development to improve the capacity of media outlets to disseminate news; literacy and education programs to improve socioeconomic outcomes and the ability of citizens to access media; support for local media in rural areas to bridge rural-urban demographic divisions; and civic participation programs to address politically polarised institutions.
10. The authors also propose approaches to quantitative analysis of data and indicators for media capture, media development, and good governance. Specifically, the endogeneity of the relationship between media development and good governance outcomes calls for the application of an instrumental variables approach. Further, given the framework developed in this report, the authors propose the use of country-specific supply- and demand-side indicators for DFID and the World Bank's PEA survey of media segmentation and capture.



### Chapter 1 Introduction

The Sustainable Development Goals (SDGs) came into effect in January 2016 building on the progress made by the Millennium Development Goals (MDGs). They are “a universal call to action to end poverty, protect the planet and ensure that all people enjoy peace and prosperity” (UNDP, 2017a). SDG16: Peace, Justice and Strong Institutions aims to “promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels” (UNDP, 2017) and is broadly concerned with the notion of “good governance.” This Capstone report more specifically focusses on the following subsections:

- Substantially reduce corruption and bribery in all their forms
- Develop effective, accountable, and transparent institutions at all levels
- Ensure responsive, inclusive, participatory, and representative decision-making at all levels

Literature on good governance is wide and varied. Key to this project is the role of media in promoting good governance and the relationship between media development and efforts against corruption, to promote transparency, and to facilitate sustainable institutions that demonstrate *capability*, *accountability*, and *responsiveness* (DFID, 2008). The media is a critical sector in shaping relationships between the state and citizens and key global trends in the media are already leading to change in country-level governance. Incentives and disincentives driving the media sector can lead the media to play either a positive or negative role in facilitating good governance. This report pays particular attention to the role of such incentives driving media capture in fragile and less developed countries (LDCs) (DFID, 2008).

This report focuses on the role of economic, political, and other contextual factors in shaping media freedom and facilitating public discussion in the context of promoting progress on SDG16. A key reason why good governance is undermined is that national or local media cannot report on topics that may threaten or displease the government. However, the development of effective citizen vigilance against bad governance does not depend solely on the existence of a relatively free media, even in authoritarian regimes or semi-democracies. Many political parties, underground or

## Chapter 1 - Introduction

autonomous social movements, and civic-oriented NGO's are widely active and partly effective even in conditions of limited media freedom. These organisations often derive significant support from foreign media coverage, diasporas, or expatriate media. Nevertheless, the potential for effective citizen vigilance and civil society pressure for good governance is greater when they can secure domestic media coverage (DFID, 2001).

The relationship between media development and governance is complex – the relative importance of different types of media (radio, print, television, Internet) depends on specific economic and political contexts at both national and sub-national levels. Development funders should therefore ask:

- Which *media* is being captured?
- At what *level*?
- For what *audiences*?
- And *why*?

Currently, national-level aggregate indices provided by Freedom House (FH) and Reporters Without Borders (RWB) attempt to track media freedom. Yet these scores do not provide a detailed understanding of local media censorship; relying on them inhibits the impact of media development funding and also obscures the effect of blanket-funding of “the media” in LDCs. Because media market failures and media capture respond rapidly to economic and political contestation, studies of media markets and capture in LDCs rely on expensive surveys that quickly become outdated. Moreover, the ability of the media to effect good governance outcomes is influenced not only by media *capture* but also by developmental trends in the media more generally. Thus, this project seeks to define a set of *drivers* that influence how the interests and incentives faced by different groups in society (i.e. governments, citizens, and the media) shape the opportunities and challenges for improving progress on SDG16's good governance components through the media. In so doing, this report derives four broad categories of “costs” of media capture and development: media capacity, socioeconomic factors, demographic factors, and institutional factors. These categories interact with each other and inform the country case-study analysis, policy recommendations, and conclusions.

## Chapter 1 - Introduction

SDG16 is defined to avoid any reference to the kind of political system in question. This report therefore employs a neutral political economy analysis (PEA) framework (DFID, 2009) of media capture to answer if and why there is variation in media censorship across different countries given how the media market has been shaped historically. This framework seeks to address the dual aims of the report:

1. *Specifically*: to inform quantitative analysis of media censorship data; and,
2. *Broadly*: to explore the relationship between SDG16 and media capture, that is, to investigate the effects of media on good governance outcomes.

The report is structured as follows: Chapter 2 defines the dimensions of media capture, media development, and good governance. Chapter 3 then proposes an analytical framework for understanding media capture through a review of existing academic and empirical literature on the subject. Chapter 4 will provide an analysis of media capture in the four case-study countries of South Sudan, Tanzania, Bangladesh, and South Africa using the framework of the four key drivers and informed by qualitative interviews with various stakeholders within each country. Lastly, Chapter 5 proposes recommendations for DFID and the World Bank to move forward in:

1. Assessing media censorship and media market segmentation at the sub-national level in terms of analytical approaches to a global media metrics dataset; and,
2. Facilitating good governance outcomes through media development and assistance.

## Chapter 2 Definitions

In this chapter media capture, media development, good governance, and the media market and their dimensions are defined by borrowing from relevant academic and development literature.

### 2.1 Media Capture

Media capture is understood to occur when the government or public officials influence the gathering, dissemination, and reporting of news content. This report discusses both *coercive* and *non-coercive* forms of media capture. Coercive media capture occurs when a government or public official directly intervenes in news production, for example by threatening or using violence to shut down a newspaper outlet. Non-coercive media capture is understood as occurring when media outlets do not report news or information in the public interest even without direct government intervention. Leeson (2008) finds that media capture can be “direct, such as when states monopolise media ownership in their nations, or indirect, such as when they exert financial pressure on private media outlets to cover news in a certain way” (Leeson, 2008: 155). This may also be called “soft censorship,” occurring through the withholding of public funds or the monopolisation of media funding and ownership by government officials (Lansner, 2013). For example, Di Tella and Franceschelli (2009) find that increases in government advertising funding in Argentina are associated with reduced coverage of corruption issues. However, non-coercive media capture can also occur through private interests, for example when politically-motivated advertisers deny advertising revenue to media outlets that seek to report news that runs counter to their political motivations (Lam, 2017).

### 2.2 Media Development

When analysing media capture in the context of achieving good governance outcomes, media capture should be broadly defined. Beyond non-coercive media capture as discussed above, this report also refers to “media development,” i.e. strengthening independent media, which is defined as supporting and promoting “a pluralistic, editorially independent, and financially sustainable media sector” (Kalathil, 2011: 3). This report focuses equally on media development and media capture because often (and especially in LDCs) the lack of information or news circulated in the public interest is *not*

due to media capture but rather to an underdeveloped media market. A weak market may exist due to economic instability, inadequate infrastructure (e.g. roads, electricity provision, telecommunications infrastructure), or a lack of managerial or administrative capacity to run media outlets professionally or sustainably.

### 2.3 Good Governance



Figure 2.1- Good Governance (UNESCAP, 2010)

Good governance is ambiguously defined in development literature. This report borrows from several “definitions” of good governance. According to the United Nations, decision-making processes (broadly understood as “governance”) are “good” if they are “participatory, consensus oriented, accountable, transparent, responsive, effective and efficient, equitable and inclusive and follow[...] the rule of law” (UNESCAP, 2010.: 1). DFID (2006: 22) suggests good governance “is not just about government. It is also about political parties, parliament, the judiciary, *the media*, and civil society” (emphasis not in the original). SDG16, the good governance goal, relates to the promotion and development of “inclusive societies for sustainable development” with “effective, accountable and inclusive institutions at all levels” and uses a set of indicators to track good governance in development, including indicators focusing on corruption and bribery, demographic representation in public institutions, illicit financial flows, and incidence of violence and death. This report therefore notes that:

- Good governance can be a general outcome;
- Media can influence good governance outcomes, and that an independent media itself is a good governance outcome;

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- There are specific and measurable indicators that can be assessed as good governance outcomes on which media development and capture can have an impact.

### 2.4 Media Market

A media market is defined as a geographical region where a defined population can access content provided by media outlets. This report discusses country-specific media markets in four case-study countries. Different media have different shares of the total “media market” in a country; for example, radio outlets may serve a larger proportion of the population than television, and thus radio would have a larger share of the media market.

This report segments the media market with dual and overlapping categorisations:

- **Medium:** the media market can be segmented by medium. This report discusses radio, television, print, and online media as separate segments of the media market.
- **Ownership:** the media market can be segmented by type of ownership. This report discusses public ownership (controlled by the state or government), private ownership (controlled by private individuals or corporations with a profit-motive), and community ownership (collectively owned media or ownership through a representative mechanism).

## Chapter 3 Analytical Approach

This chapter presents a political economy analysis approach for understanding what drives media market segmentation, media development, and media capture in four case-study countries. It suggests the relationship between media capture and good governance outcomes is best understood in terms of supply- and demand-side factors that drive the production and consumption of news content. It therefore proposes four categories of such factors: capacity-related, socioeconomic, demographic, and institutional.

### 3.1 Theoretical Framework

In order to investigate how media censorship is related to good governance outcomes, this report begins with Besley and Pratt's (2006) model, which describes media capture in terms of whether media institutions are likely to derive larger benefits from audience-related revenues or from government bribes and transfers. According to Besley and Pratt, because media capture is influenced by the relative transaction costs of said capture:

- Media pluralism prevents media capture;
- Independent ownership prevents capture;
- Media capture affects political outcomes.

However, Besley and Pratt model the media as one unitary actor, i.e. for media capture to occur, all media must be captured. Corduneanu-Huci and Hamilton (n.d.) provides an expansion to this baseline model that disaggregates media capture and suggests that there may be equilibria in media capture in which only one segment of the media (e.g. radio) is captured. This suggests some audiences (e.g. English-speakers, urban residents, or members of a specific ethnic group) may be more important targets for media capture than others. According to Corduneanu-Huci and Hamilton, audiences can be either "elite" or "non-elite" and they can receive their information from elite-oriented or non-elite oriented ("mass media") media outlets. In this disaggregated model, "tight control of one type of media outlet (elite/non-elite) may coexist with less control of the other subset of the media (non-elite/elite)" (Corduneanu-Huci and Hamilton, n.d.).

This report further explores the division between “elite” and “non-elite” audiences by investigating the factors that determine whether one subset of a country’s population is “elite” or “non-elite,” and also further explores the division between elite-oriented and mass media outlets by investigating what factors contribute to media market segmentation in a country. From a review of the literature on the political economy of media capture *and* on the political economy of media market segmentation, this report finds that several “factors” or “drivers” influence which types of media are more prevalent in a given market, and also influence whether or not those types of media are important sources of information for elite or non-elite citizens. Drawing from Besley and Pratt’s model --in which media capture is largely shaped by transaction costs of bribery and in which media pluralism and independence increases these costs-- this report proposes four categories of drivers structuring the “cost” of media capture in order to ask:

- What media capacity related or material factors (such as the availability of equipment) help secure an independent media?
- What demographic factors contribute to audience and media segmentation and how can these be addressed to contribute a plural and diverse media in terms of medium, content, and audiences?
- What socioeconomic factors influence the capability of media outlets to secure funding and revenues that allow them to produce quality content?
- What institutional factors, such as the legal environment, clientelistic networks, or ownership structures affect the “cost” of censorship?

### 3.2 Methodology: Case-studies and Interviews

The anecdotal evidence for this report’s case-studies is sourced from 36 interviews with a wide range of stakeholders, including: academics that served to inform the general theories of media capture and the link between media and development; practitioners (journalists, editors, etc.) in the case-study countries that shared their impressions of censorship and the state of the media in their country; and civil society members that work in close proximity with media highlighted the connections between media freedom and good governance. The practitioners interviewed covered the spectrum of media addressed in this report (print media, radio, television, and Internet based media (including mobile Internet)). It should be noted that several interviewees wished to remain



anonymous. These interviews complemented the literature review which examined the state of the media within each country within the framework of four broad drivers structuring the “costs” of media capture and development. Each case-study is accompanied by a “spider-map” representing the difference within each country between the audience reach of each medium (market share) and its importance for capture (e.g. because of its agenda-setting power or broad audience reach). These graphs are the authors’ representations of the relative (ordinal) importance for medium-specific capture based on qualitative insights derived from the interviews.

	<b>Total</b>	<b>South Sudan</b>	<b>Tanzania</b>	<b>Bangladesh</b>	<b>South Africa</b>
<b>Academics</b>	8 ( <i>incl. one generalist</i> )	-	1	2	4
<b>Media Practitioners</b>	20	5	9	1	4
<b>Civil Society</b>	8	2	3	1	3

Figure 3.1 - Number of Interviews Conducted in Each Case-Study Country

### 3.2.1 Methodology and Data Limitations

The authors recognise that the sample size of interviewees in each country is small (especially in Bangladesh) and note the time-constraint for completing this report. The interviews conducted for this report serve primarily to highlight the salience of evaluating media capture and market segmentation along supply- and demand-side driven factors as well as to provide anecdotal evidence of the dynamics underlying the production and consumption of news in each case-study country. The authors therefore emphasise that the findings for each case-study country are not generalizable for other countries (even LDCs), and hence stress the development of a more generic framework through political economy analysis.

### 3.3 Drivers

The theoretical and empirical literature, complemented by insights from qualitative interviews lead the authors to derive the following as major “drivers” of media segmentation and capture.

#### 3.3.1 Media Capacity

These are a set of factors that materially affect the in-country supply of media, including the extent and sources of media outlets’ funding, the existing degree of both journalistic and managerial professionalism, and the quality and extent of infrastructural development. In general, materially wealthier media outlets (or a materially wealthier media market) are less susceptible to capture because this increased capacity also increases their relative costs of capture. Financial sustainability is a critical factor for the independence of the media; if media outlets are unable to secure revenues from audiences or from commercial advertising, the likelihood is higher that those outlets will accept financial inputs from the government or other politically-motivated interests (Foster, 2012). It is important to note that advertising revenues do not facilitate media independence if those advertising budgets are distributed by government agencies or by politically biased corporate interests (Lam, 2017). Further, potential audience revenues are largely structured by in-country socioeconomic factors such as levels of literacy and demographic factors such as audience location.

A lack of managerial capacity (for example in the case of community-owned radio stations in LDCs) can also be understood as decreasing the relative costs of media capture because inability to manage a media outlet’s budget or financial inputs and outputs jeopardises that outlet’s financial sustainability. Especially in LDCs, a lack of managerial capacity makes the establishment of strong independent media associations or other civil society groups representing the interests of a free and independent media more challenging. When the media is unable to represent its interests collectively it is easier for the government to capture individual media outlets. Similarly, increasing journalistic professionalism (for example, journalists who receive training in universities and who uphold media freedom or who do not engage in highly politicised reporting) can prevent journalists from being paid off to produce stories for politicians or government agencies.

A lack of journalistic professionalism in LDCs is particularly problematic when there exist patterns of clientelism that lead journalists to incline towards politicised reporting in favour of or against other ethnic groups (Skjerdal, 2011), or where media outlets simply do not have the financial resources to provide adequate salaries, leading trained journalists to leave the country for work or to change professions. Finally, infrastructural development can structure the cost of capturing media and have a direct impact on media development. For example, poor road infrastructure constrains print news distribution, and poor electricity infrastructure constraints broadcast media, limiting potential audience revenues. This report also considers the impact of media equipment (or lack thereof) for structuring the costs of media capture; for example, in countries where there are fewer operational printing presses it is easier for the government to influence news content because there exist fewer points of production. Insufficient or prohibitively expensive equipment thus leads to lower costs of media capture.

### 3.3.2 Socioeconomic Factors

These are a set of factors that influence demand for information and media content more generally, including the purchasing power of the audience, economic instability in a country, the level of education, and other economic markers such as food security. At the simplest level, an audience's purchasing power determines the potential audience revenues media outlets can reap; low audience purchasing power means that media outlets in general will be easier for the government to capture because media outlets will seek other sources of revenue. Moreover, audience purchasing power has a significant impact on media development, regardless of capture. Without potential audience revenues, it is more likely that media outlets will derive their revenues from advertisements, which (as discussed) can bias reporting (Rhodes, n.d.). Highly correlated with purchasing power and income levels is the general level of education in the population. This report argues that low literacy and education levels in a country structures media development such that non-print media will take a higher market share. Low literacy therefore lowers the relative costs of print media capture because print media will be constrained by the lack of audience. Economic instability problematizes media outlets' financial sustainability (for example, their ability to forecast budgets); economic instability can make it difficult for print media to set market costs, can make it difficult for radio or television broadcasters

to purchase fuel to generate the electricity needed for broadcasting, and can raise the costs of data so that the Internet becomes prohibitively expensive. Issues such as famine have a clear effect on media development –if a population is generally food insecure it is unlikely that resources will be directed towards media, lowering the cost of media capture generally. Finally, it is worth noting that socioeconomic status can have an effect on the audience’s willingness to accept or support media censorship; for example, Rodríguez (2013) finds that ideological stances, age, and support for the incumbent government all influence approval of government censorship.

### 3.3.3 Demographic Factors

These are a set of factors that contribute to divisions of the population into segments, for example by ethnicity, language, religion, or geographic location. A more segmented audience or population naturally constrains the potential audience revenues of any media outlet because it is more costly for media outlets to produce content serving, for example, a diversity of languages (Benjamin, 1995; Gandy Jr., 2000). These audience segmentations directly interact with media supply; a country with a stark urban-rural divide that is associated with income disparities will likely see, for example, the use of televisions as a source of information restricted to urban elites who can afford a television and the associated electricity costs. Audience segmentation further interacts with a country’s bureaucratic structure of government; for example, countries with difficult-to-reach rural areas may see an increased dependence of local media on local government funding. Or, where ethnic tensions exist and patterns of clientelism are ingrained in employment practices, ethnic divisions may become mirrored in media segmentation where outlets specifically target information for a particular ethnic group (or against a particular ethnic group). In general, a more segmented audience lowers the costs of targeted capture of any particular media segment that exists to serve a particular audience. By the same logic, a more segmented audience (and more segmented media market) is more difficult to capture in totality because there will exist more points of distribution to control. However, it is noted that while greater audience segmentation lowers the costs of media capture, a segmented audience (depending on the political salience of these segmentations) may also lead to a more politicised media market overall (Gonzalez, 1988). Moreover, where a country’s population is relatively homogenous, it is likely the

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media market itself will be less segmented; less sources of media will serve larger proportions of the population, and thus capturing fewer media outlets has a greater impact on the flow of information.

### 3.3.4 Institutional Factors

These are a set of factors that largely determine the independence of the media in a country, including media ownership structures, the legal environment, relationships between the media and the government (including polarisation), and patterns of clientelism in both government and the media. As Besley and Pratt (2006) argue, concentrated media ownership leads to lower costs of media capture, especially where, for example, corporate owners also operate in other industries that can benefit from favourable government contracts, or owners are themselves also public officials (IREX, 2017). That is, the higher the concentration of media ownership, the more information becomes underreported (Germano and Meier, 2013). This is also true for concentrated ownership of businesses that disburse advertising revenues to media outlets, where advertisers may seek to prevent the publication or broadcasting of news by withholding advertising contracts. Moreover, a highly concentrated ownership structure in media markets produces less points-of-control for capture; that is, the government can make transactions to fewer parties, and this is less costly in models of contingent direct exchange (see Kitschelt and Wilkinson, 2007). The Center for International Media Assistance (CIMA) similarly points out that unbiased reporting is more likely where there is a diversity of owners and investors (Foster, 2012).

A country's legal environment can be either conducive or disruptive to media capture; for example, non-democratic regimes may have a set of legislation that grants broad powers to censure or close down media outlets under vague definitions of "national security". Counterintuitively, underdeveloped legal infrastructures (for example, a lack of options for legal recourse or a lack of regard for due process) can also be beneficial for media outlets in the context of capture, because the proximity between media outlet directors and public officials may be greater, and the possibility of informal bargaining and negotiation processes decreases the likelihood of unilateral capture of a media outlet by governments. Thus, legal environments can be both enabling and constraining. Egorov

### Chapter 3 – Analytical Approach

et al. (2009) point out that the extent to which governments will allow media freedom can also depend on the extent to which the media allows governments to provide incentives to bureaucrats or elites, and that the extent to which these incentives are provided is influenced by how resource-rich a country is. Finally, patterns of clientelism in government and in media can severely politicise news reporting and increase or decrease the costs of capture depending on the incumbent and the media outlet in question (Adler, 1993; Smith, 1980). For example, in ethnically-driven clientelism, one may find that media owned or operated by those from a specific ethnic group is “instrumentalised” by incumbents from that same ethnic group (Hallin and Papathanassopoulos, 2002). Essentially clientelistic practices entrench demographic divisions such that the cost of media capture either becomes higher if the media outlet in question does not benefit from client-patron exchanges with the incumbent government or lower if not.

## Chapter 4 Country Case-Studies

This section applies the political economic analysis framework outlined above to four case-study countries: South Sudan, Tanzania, Bangladesh and South Africa. Each case-study begins with an overview of the domestic media market and then explores the impact of media capacity, socioeconomic, demographic, and institutional factors on media capture and media development in each country.

4.1 South Sudan



Figure 4.1- South Sudan (Source: CIA World Factbook)

*The world’s youngest country, South Sudan became independent from Sudan in July 2011. It is governed by an ethnically-diverse coalition government, that draws the vast majority of its revenues from extracting the country’s natural resources (especially oil), and that has governed in the context of civil war since 2013. Of particular relevance to the segmentation of the South Sudanese media market (and, in turn, to how it is censored) are: an extremely high illiteracy rate (about 74%), a diverse set of ethnic and overlapping linguistic groups (60+) who are geographically spread around the country, and a sharp divide between the relatively developed capital city, Juba, where residents are wealthier than in rural areas and speak mainly Juba Arabic and English, and rural areas which are underserved by infrastructure including roads and electricity. According to FH, media freedom in South Sudan has steadily decreased since 2012, with the country receiving an overall press freedom label of “not free”.*

**“In South Sudan anything is possible. It’s because in every institution we have our brothers. We know them by name.” – Interviewee 1**



### 4.1.1 Media Market

The dominant form of media in South Sudan is radio. It is the main source of news for most citizens, a 2008 survey found that radio was a source of information for 98% of respondents (with 78% stating it was their most important source of information) (Consumer Options Ltd., n.d.). However, FM radio broadcasting still does not reach some remote rural areas. FM radio broadcasting is complicated by the fact that signal is weak even in urban areas and that radio ownership is not widespread (Leigh and Tesar, 2008) (the national average of radio ownership being around 60% (Consumer Options Ltd., 2007)). Moreover, in 2007 only 32% of the population owned an FM radio, while shortwave (SW) and medium wave (MW) radio ownership is at 34% and 41% respectively. Satellite radio ownership (by which any station can be received worldwide) is lowest, at 2% of the population (Consumer Options Ltd., 2007). Nevertheless, as TV and mobile penetration are even lower and four out of five South Sudanese live in rural areas (Powell, 2012), radio remains the most viable medium by which to transmit information.

The largest radio provider is the United Nations Mission in South Sudan (UNMISS) channel, *Radio Miraya*, established in 2005, which broadcasts in English and Arabic. Many radio stations are organised by NGOs and may serve particular rural and/or ethnic communities. Fondation Hirondelle's 2007 survey found that 51% of respondents were aware of *Radio Miraya*'s broadcasting (Powell, 2012).

Print media is concentrated in Juba and is printed in English and in Arabic. While newspapers are circulated in some smaller South Sudanese cities, such as Wau and Torit (Gachie, Mogga and Maika, 2009), they are less common outside of the capital and only a source of information for 14% of South Sudanese (Powell, 2012). Fondation Hirondelle's 2007 survey of media consumption patterns found that while newspapers are largely not considered a daily news source, they do tend to be consumed "2-3 times a week" (Consumer Options Ltd., 2007); this suggests a low frequency of distribution, a point which was confirmed by interviews (Irene, 2017).

Television exists but is underdeveloped. The primary TV broadcaster is the state-run South Sudan Broadcasting Corporation (SSBC). TV is consumed by about 18% of the South Sudanese population (BBC Media Action, 2012a). Penetration is highest in urban areas like Juba; many remote areas simply do not have the electrical power to run TVs in households and ownership rates outside of Juba are extremely low.

Finally, while Internet penetration rates are low, the use of the Internet is significant in Juba and subscriptions exist in smaller urban areas such as Wau. It is used primarily by elites in urban areas who are able to read and speak English and Arabic. Additionally, it serves an important role for communication and information exchange between those in South Sudan and the diaspora; for example, the Sudan Tribune (a newspaper based in Paris whose existence predates South Sudanese independence) serves an important aggregating role for official information such as diplomatic statements and is widely used by foreign organisations in South Sudan for information.

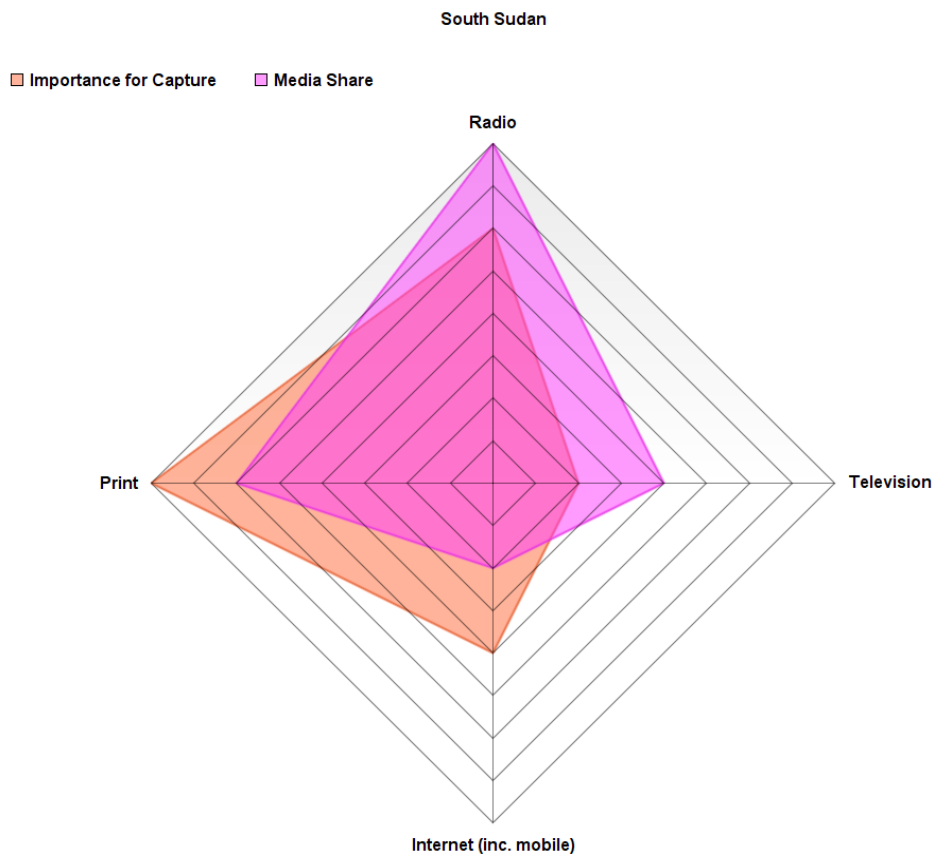


Figure 4.2- Media Capture vs Market Share, South Sudan

### 4.1.2 Media Capacity

All individuals interviewed for this report discussed economic and capacity-related issues as major obstacles to editorial independence and financial sustainability. A lack of infrastructure connecting Juba to rural townships severely constrains the ability of print media to deliver newspapers outside of the capital. The infrastructure problem is exacerbated by the fact that the dirt roads linking rural towns in the country become largely inaccessible during the rainy season between May and September (Powell, 2012). The print media market in South Sudan faces several challenges including: a lack of trained journalists to conduct investigative journalism and a lack of resources to print large numbers of newspapers (more established newspapers only circulate several thousand issues per week; sometimes, a printing press may simply run out of ink and be unable to print a week's issue) (Interviewee 1, 2017). Only one operational printing press currently exists in South Sudan (the Universal Printing Press) which increases printing costs and is also partially owned by former public officials (Taban, 2017). The same factors that cause the majority of the county's population to consume radio (lack of infrastructure and literacy), make the print media market susceptible to shut down; limited audience revenues make print media expensive and a small government imposed fine can shut down a newspaper outlet or eliminate a print run. As recently as September 2016, the English-language *Juba Monitor* increased its price, citing costs of printing as the main justification (UNDP, 2016). The cost of printing is also often cited as a reason for unsustainable media development; newspapers that previously printed daily have now opted to discontinue printing on Saturdays and Sundays to save costs (Simon, 2017).

A lack of media capacity has also led to information accuracy becoming a problem in South Sudan. As elsewhere, “fake news” has become a problem; messages on social media have been used to incite inter-ethnic violence primarily between the dominant Dinka and Nuer tribes (Taban, 2017; Patinkin, 2017). For example, a recent “fake news” article suggests a Dinka coordinated attack on Nuers in South Sudan (Africans Press, 2017). Those interviewed also discussed “fake news” as hate speech and suggest that tribal divisions cause friction in media outlets where media outlets incite inter-ethnic or inter-tribal violence. The issue of “fake news” and hate speech is tied to journalistic professionalism and capacity; those interviewed suggest that, without professional

degrees, many journalists are essentially “activists” promoting an ethnic or political cause.

### 4.1.3 Socioeconomic Factors

Highly related to a lack of media capacity is general socioeconomic underdevelopment. With ongoing civil war since 2013, South Sudan is grappling with a major refugee crisis. Frequently mentioned in interviews was the fact that the majority of the land is arable yet the country faces famine. Media investment is therefore a low priority for the government and media consumption is not a priority for the poorer segments of the population. Furthermore, the majority of the population is illiterate; while Arabic is the second-most spoken language not all people can read classical Arabic. Media outlets therefore do not target news towards these segments of the population. Economic factors are also often cited as constraints to media development; while South Sudan is an oil-rich country, it largely does not have the infrastructure to refine oil. This means that, on the one hand, the Government of South Sudan (GoSS) can profit from oil revenues where it sells crude oil abroad, yet, on the other hand, media outlets that rely on fuel to run electricity generators (especially radio stations) are especially restricted. According to radio operators interviewed for this report, fuel in Juba is prohibitively expensive - and even if radio stations have the resources to pay for fuel, its purchase requires government permission which is not guaranteed. This forces stations to purchase fuel on the black market, which increases the risk of their closure for non-political reasons. Exacerbating the need for resources is the inflation of the South Sudanese Pound (itself related to falling oil prices globally (Francis, 2016). This has increased the costs of commodities and food, forced businesses to close, and decreased foreign investment.

### 4.1.4 Demographic Factors

South Sudan is demographically divided. This contributes to media segmentation in the country and lowers the cost of targeted media capture. While English and Arabic are not spoken by the majority of the population, they are the languages used by urban elites and in which most print news is published. Interviewees noted that newspapers serve a narrow base that is primarily English-speaking (Taban, 2017; Interviewee 1, 2017). Most radio

stations do not produce local language programs; this is especially true for radio stations based in Juba. The GoSS is therefore particularly concerned with censorship for English-language print media, which, being largely based in Juba and closer to political developments, is the media format with the most “agenda-setting” influence. One interviewee expressed that Bari is a widely-spoken, important language in Juba, but that content on radio broadcasts and print media is not produced for Bari speakers, suggesting that the government would view this as “tribalism” and that it fears that use of local languages may result in more people being informed, especially in non-urban areas (Stephen, 2017).

Ethnic division also structures the costs of media capture. This is especially true in the context of hostilities between the dominant Dinka and Nuer tribes, where media outlets may be biased and politically support one of these tribes and not the other. Finally, a strong rural/urban divide (due in part to poor infrastructure connecting urban and rural areas) and the concentration of potential audience revenues in urban areas means that community media outlets (such as local radio stations) are particularly constrained in their independence and capacity to report news. For example, one interviewee described how community radio stations may be forced to broadcast for only two hours per day because of a lack of electricity and that these local radio stations tend to restrict the content of their broadcasts to cultural issues and to entertainment, such as music (Interviewee 1, 2017). Thus infrastructural, socioeconomic, and demographic factors interact creating an extremely information-poor rural population and a small urban elite that independent media outlets rely on for revenues. This means that the government is:

- Able to spend fewer resources on capturing non-elite media because these media outlets do not report content that is political or sensitive in nature;
- Able to spend fewer resources on capturing elite media because these media outlets are already highly constrained by a lack of audience revenues.

### 4.1.5 Institutional Factors

In South Sudan there is little legal clarity or due process in government interactions with the media and patterns of ethnic clientelism persist in both government and media hiring practices. According to all interviewees, media capture is almost always justified by the

GoSS in terms of national security (Taban, 2017; Interviewee 1, 2017; Stephen, 2017). Those interviewed by this report frame the national security argument as “inciting the people against the government”. For example, in November 2016, *Eye Radio* was briefly shut down because it played an interview featuring the voice of the former Vice President Machar (who was ousted by current President Kiir upon accusation of a coup in 2011 – which ignited the South Sudan Civil War). An example of the GoSS censoring corruption-related information is the shutdown of the nationwide print publication, *The Nation Mirror*, in September 2016 (Lynch, 2016) because it had published a story about a U.S.-produced investigative report on the “assets and wealth of top South Sudanese officials in the government and opposition,” (The Sentry, 2016). Regarding economic issues, it appears the GoSS is unwilling to allow information suggesting economic crisis to be broadcast; for example, when journalists attempt to report on long queues at petrol stations, their identification may be confiscated or their recording equipment destroyed or confiscated (Radiotamazuj.org, 2016).

However, a relatively underdeveloped legal environment is also cited as a benefit by media outlets, especially in terms of their ability to negotiate terms of censorship with officials. For example, the temporary closure of *Eye Radio* was ordered unilaterally by a few public officials and was not a consensus decision within the GoSS; as a result, the administration of *Eye Radio* was able to negotiate for its reopening within three days. Those interviewed suggested that informal negotiations were in fact critical to sustainable media operations in South Sudan, and that it was important for media operators to have personal contacts within the GoSS (Interviewee 1, 2017). Another interviewee noted this same dynamic at work when *Bakhita Radio* (run by the Catholic church) was shut-down; a bishop asked to speak personally with President Kiir, who then instructed government security to allow the station to reopen (Interviewee 1, 2017; VOA, 2014). At the same time, a weak legal environment only reinforces entrenched patterns of clientelism. For example, one interviewee pointed to family or tribal connections between media owners and government officials where media owners disregard media ethics and even go as far as refusing to pay taxes to the government (Interviewee 1, 2017).

4.2 Tanzania



Figure 4.3- Map of Tanzania (Source: CIA World Factbook)

*Tanzania gained its independence from the UK in 1971 but remained a one-party state under the CCM party until 1992, when it transitioned to a multiparty system. Of interest to the segmentation of the media market are: the absence of political turnover and the dominance of the CCM (Clancy, 2017) the strong urban-rural divide (68.4% of the population lives in rural areas with poor infrastructure) (World Bank, 2015) and the ethnic and linguistic divide between Zanzibar and the Mainland (Arab vs Bantu ethnicities, Arabic vs. Kiswahili) (CIA, 2015). Literacy levels in Tanzania are high at 80%, while 46.6% of the population living below \$1.90 a day (World Bank, 2015). FH characterise the press in Tanzania as “partially free”, this score has been increasing steadily since 2012, but suffered a setback in 2015 (Freedom House, 2016).*

**“Zanzibar is an entity in and of itself, almost a foreign country, and that is how the media sees it.” – Clare Clancy**

4.2.1 Media Market

Within this context, the major source of news for Tanzanians is radio (used by 96% of Tanzanians), followed, in urban centres, by TV and newspapers (Tanzania Media Foundation, 2015). Newspapers in English and Swahili continue to have important agenda-setting power as they are often the first to break important stories that are relayed through other mediums (Kibanda, 2017). This is particularly true of English language newspapers, which, due to limited readership, have tended to be less censored than the Kiswahili press (Kalunga, 2017). This reflects the fact that the market share of a medium does not necessarily equate to its importance for capture (see figure 4.5). There is a growing role for mobile Internet sources, with penetration at about 20% of the population (Africa Media Barometer, 2015). Tanzanians have taken to using platforms such as WhatsApp to distribute news (Interviewee 2, 2016), and blogs are gaining in popularity (Tripp, 2012).

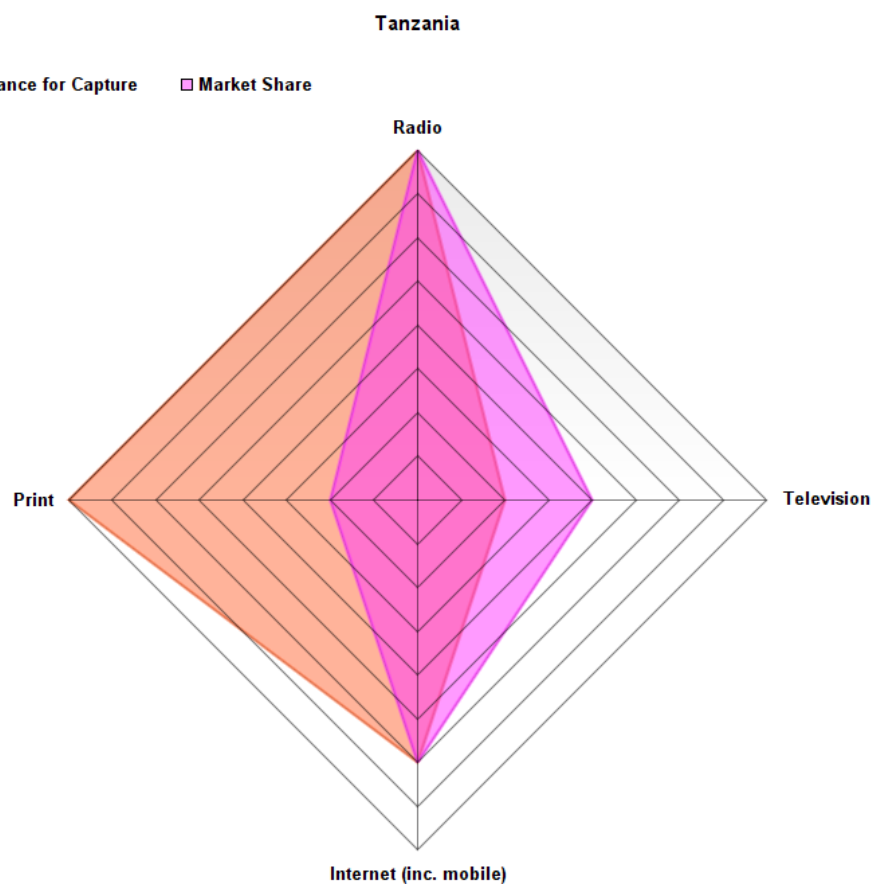


Figure 4.4- Media Capture vs Market Share, Tanzania



### 4.2.2 Media Capacity

In Tanzania information quality is an issue especially in newspaper and television reporting (Tanzania Media Foundation, 2015). Professionalism and diversity of content is frequently perceived to be poor along with accuracy and independence of reporting (Tanzania Media Foundation, 2015). News has so far depended on or reprinted releases from government sources rather than from investigative reporting (Kalyango Jr., 2010). The state-owned media also acts as a government mouthpiece (Kalyango Jr., 2010). Nevertheless, private media, especially radio stations, have tended to be better platforms for discussion and perform an important watchdog function, helping hold elites accountable by exposing corruption and embezzlement scandals (Kalyango Jr., 2010). Despite the influence of state-owned media, almost all corruption scandals in Tanzania have been exposed by private newspapers (Manara, 2011). This is unsurprising, given the newspapers with the largest audiences, *Uhuru* and *Mzalendo*, are owned by the CCM (Ngonyani, 2000). The newspapers mislead public perceptions by portraying civic institutions as subversive and isolated (Ngonyani, 2000).

Illustrative that these “costs” do not exist in isolation, professionalism and quality of information are linked to institutional factors. Journalists, rather than truly investigating tend to be simply embedded within campaign teams, becoming public relations (PR) mouthpieces (Media Council of Tanzania, 2015). Requirements of objectivity, balancing stories, multiple sourcing and providing various perspectives are often disregarded. Consequently, there are few attempts to publish the voices of marginalised voters (Media Council of Tanzania, 2015). As journalists tend to be underpaid and poorly educated it is relatively easy for the government or political parties to bribe them with PR jobs (Tripp, 2012; Africa Media Barometer, 2015). This is compounded by the fact that some 80% of Tanzanian journalists work as freelancers and will only produce stories if they are paid to do so (Africa Media Barometer, 2015). Additionally, the majority of journalist training available is concentrated in Dar es Salaam (Dar) (Media Council of Tanzania, 2015; Manara, 2011). Tying legal factors into media capacity, licensing requirements under the new Media Services Act 2016 (MSA) do not reflect the fact that many Tanzanian journalists operate with no qualifications and nothing more than a smartphone camera (Valentine, 2017).

There is also a financial component to media capture in Tanzania. Especially in the case of newspapers, the government is a major source of revenue. As the biggest advertiser in a country with a relatively small media market the government can exert financial pressure on media companies (Africa Media Barometer, 2015). Government media is also the most economically sustainable form of media, with the CCM using the resources of government to channel advertising revenue to state-owned media, leaving private and independent media reliant on corporate funding (Kibanda, 2017). However, interviews suggest that the influence of the government through revenue may be waning as advertising income from private firms becomes more reliable with economic development (Thomson, 2017). Nevertheless, funding community radios and other small outlets remains a challenge as rural leaders often lack managerial skills and, unless they form associations such as the *Community Radio Network of Tanzania* to present unified audiences, lack attractiveness for private advertisers (Kalunga, 2017).

### 4.2.3 Socioeconomic Factors

Despite high levels of literacy and good access to education, low quality in English education still pose challenges to media freedom. Interviews highlighted that many quality newspapers in Tanzania are published in English and therefore have very limited distribution, curtailing population access to less censored forms of information (Interviewee 2, 2016; Interviewee 3, 2017). This is compounded by the government's 2015 decision to change the language of secondary education from English to Kiswahili (Mohammed, 2015).

### 4.2.4 Demographic Factors

The major audience divisions in Tanzania are the rural-urban and Mainland-Zanzibar divides. The rural-urban division is significant as an underdeveloped transport network prevents the timely circulation of newspapers to rural communities (Mwainyekule, 2017). Thus, they are reliant on community radios that often lack independence due to the factors explained in “media capacity”, or have access only to the heavily-censored national broadcaster (Mushi, 2017) as it reaches the broadest audiences (Ramaprasad, 2001).

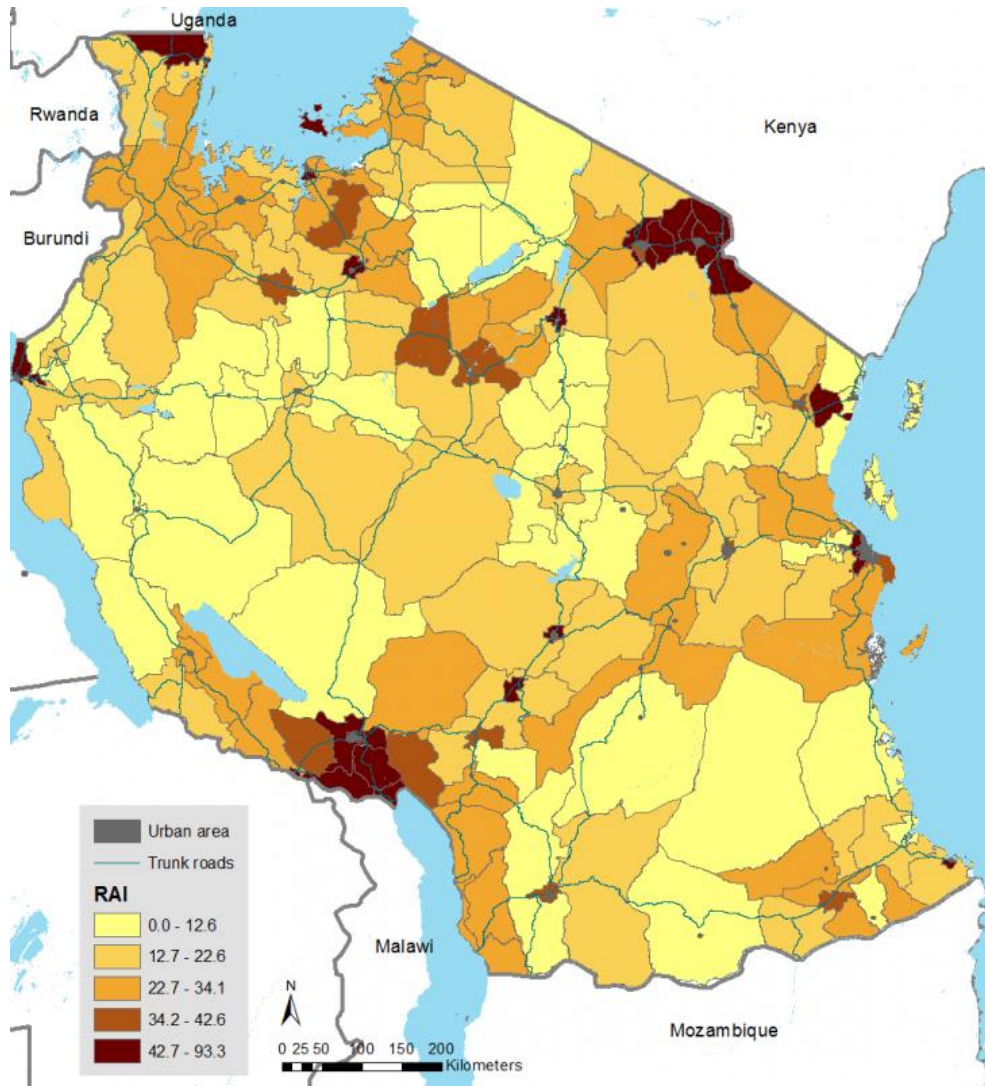


Figure 4.5- Rural Access Index Tanzania (Purdie, 2016)

The Zanzibar-Mainland division manifests itself through the comparative lack of independent media on the island, where it is dominated by the government’s *Zanzibari Leo* (Interviewee 3, 2017). There is also a lack of coverage of the island in Mainland news outlets. Interviews highlighted that “Zanzibar is an entity in and of itself, almost a foreign country, and that is how the media sees it” (Clare Clancy, 2017). The paucity of media on Zanzibar is partially due to factors including a strong independence movement (Interviewee 3, 2017), and the “self-reinforcing mechanism whereby less exposure leads to less outcry about violations of freedom of the press” (Thomson, 2017).

Journalism remains a risky profession in Tanzania. Journalists and civil society activists are regularly intimidated, threatened or even physically attacked (Africa Media

Barometer, 2015). This is particularly true for journalists in private, community media and state-owned media, who are openly critical of the government, the President or the CCM (Africa Media Barometer, 2015). Despite RWB reporting zero deaths of journalists, media assistants or netizens in 2015, there is a history of violence against them and one newspaper was closed in 2016 (Reporters Without Borders, 2016). The map below shows that attacks are concentrated in Dar, as most media houses and journalists are located in Dar and because urbanites have tended to be much more critical of the government (Tanzania Media Foundation, 2015).

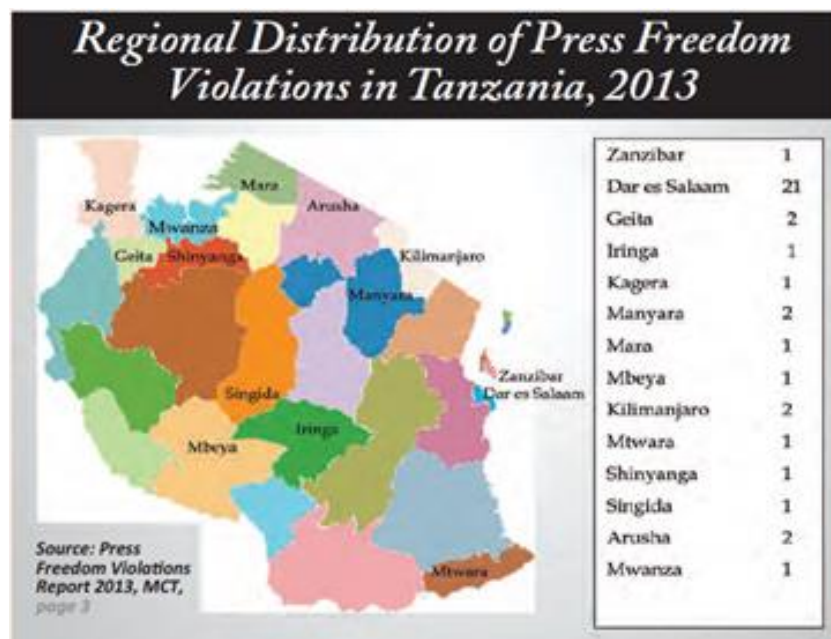


Figure 4.6- Violations (Media Council of Tanzania, 2013)

#### 4.2.5 Institutional Factors

Since its electoral majority in 2015, the ruling CCM party has reinforced its dominance and control over the apparatus of the State, including the media (BBC Media Action, 2012b).

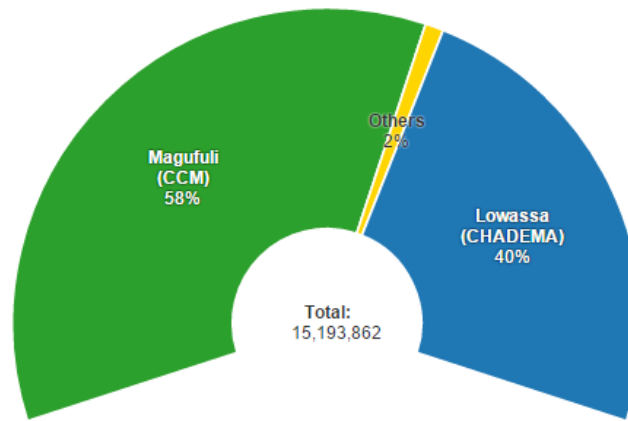


Figure 4.7- 2015 Presidential Election Results (Taylor, 2017)

Evidence of this dominance can be found in cases such as the termination of the partnership between the BBC Media Action and the Tanzania Broadcasting Corporation due to increased coverage of the opposition Chadema party (BBC Media Action, 2012b). This dynamic has been confirmed in interviews suggesting that the CCM views the media as partly responsible for the electoral gains of the opposition in 2015 and 2010 (Kibanda, 2017). The rise of political opposition has incentivised the State (the CCM) to capture the media in order to maintain power. In order to address its concerns, the CCM has constructed a legal framework for censorship through the judiciary. “The existing legal structure, interpreters of that legal tradition in the courts and parliaments, and the political culture contradicts the existing constitutional framework of freedom of expression” (Matumaini, 2011: 242). As the media has become more plural and has tried to play a more of a watchdog role there is growing evidence of bribery in the media (Matumaini, 2011). Nevertheless, this may overestimate the centralisation of power within the CCM. Despite the lack of political turnover there is strong internal competition between different factions of the CCM (Gray, 2015). There is also evidence that the timing and exposure of corruption cases within the ruling party and elites has been linked to the rise of a more vocal and plural media (Gray, 2015).

Despite the switch to a multiparty system in 1992 increasing the number of media outlets available (Summer, 2008), the CCM’s continued dominance has allowed it to pass laws restricting entry to the media market. Nominally, freedom of expression is guaranteed with provisions in the Constitutions of Tanzania and Zanzibar (The United

Republic of Tanzania, 1977). However, The Broadcasting Act 1993 created the Tanzania Broadcasting Commission, putting the delivery of broadcasting licenses under presidential control (The United Republic of Tanzania, 1993), and the Newspapers Act 1976 requires newspapers to register with the government (The United Republic of Tanzania, 1976). This requirement is even more stringent in Zanzibar, as news reports must be “accurate and truthful” under tough libel laws. The law established State oversight over newspaper publishing and distribution while penalising “offences against the State” (The Government of Zanzibar, 1998). Moreover, journalists desiring access to State information require press cards issued by the Information Service Department, available only to those with adequate proof of qualification (Africa Media Barometer, 2015). The MSA has complicated the procedures for journalists and media houses in obtaining accreditation, by increasing the burden of proof of qualification (Valentine, 2017). The opposition and civil society are challenging the Act, deemed contrary to the constitutional guarantee of freedom of expression. However, this challenge is dependent on the external East African Court of Justice (Ngurumo, 2017). Thus, despite increased pressure, there exists few options for recourse available to challenge censorship. The passage of these laws, and the arrest of the founder of one of the biggest local forums (*Jami Forums*) under the Cybercrimes Act 2016 (CA) have made journalists more inclined to self-censor (Mwainyekule, 2017). There is, furthermore, no legally guaranteed access to information. The Public Service Act 1962 restricts the information that public servants can reveal (Africa Media Barometer, 2015) and the Public Leadership Code of Conduct 1995 does not allow the media to report on the property holdings of public leaders (Matumaini, 2011). Nevertheless, in 2016, alongside the MSA, the government did pass a limited Access to Information Act, but with the provision that information can be withheld if deemed to affect “the defence, national security and international relations” of Tanzania (United Republic of Tanzania, 2016). “The government [. . .] has used whatever legislation is useful to build a wall preventing access to any form of information which would reveal the repression, corruption and arbitrary power of the CCM leadership” (Matumaini, 2011).

The media is also politically polarised especially during electoral campaigns, when the dominance of the CCM and its control over the public broadcaster results in a

disproportionate amount of air-time for its candidates (Media Council of Tanzania, 2015). Outlets that do give airtime to opposition parties tend to act as their mouthpieces rather than prioritise unbiased analysis of electoral issues (Media Council of Tanzania, 2015)

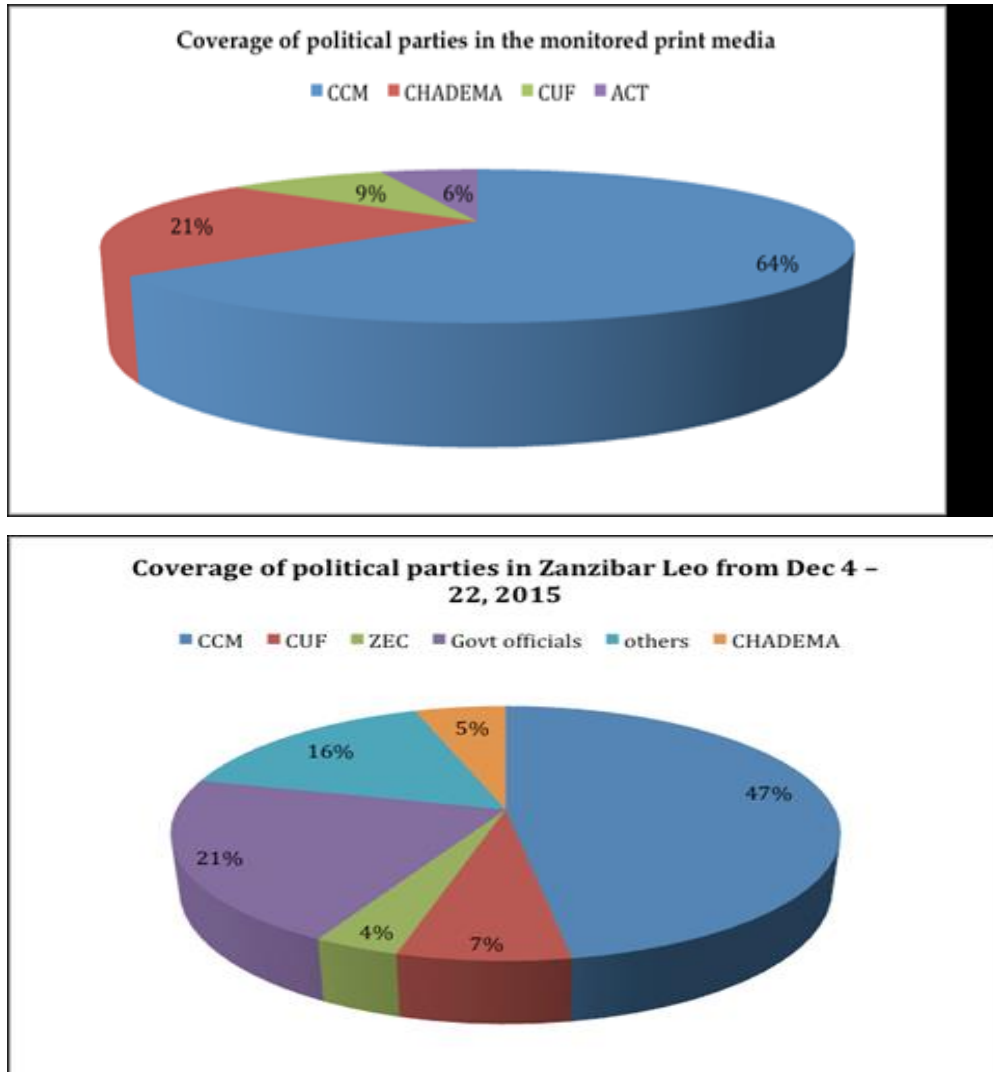


Figure 4.8- Media Coverage (Media Council of Tanzania, 2015)

Tanzania also has a culture of non-criticism of the individual reinforced by strong anti-defamation laws and the penalisation of insults to the president under the MSA (Valentine, 2017). This culture, according to research and interviews, emerged following the end of colonial rule when the press was nationalised and extensively used for adult education and national cohesion (Summer, 2008). Years of exposure to one-sided reporting has biased people against differing points of view (Ngonyani, 2000).

This ties into the concentration of media ownership. The rise in private media in Tanzania has come alongside the emergence of moguls who use their power to shield corruption (Stapenhurst, 2000). Therefore, despite a façade of liberalisation, the voice of the government is everywhere as journalists are used as a mouthpiece for the opinions of moguls and their friends in government (Stapenhurst, 2000). Media houses that are perceived to be too critical are often bought by rich elites connected to the CCM (Tripp, 2012). Nevertheless, interviews suggest that there remains an independent segment of the media accessible to elites - notably in print or on online forums - that is critical of the government (Mwainyekule, 2017; Rutenge, 2017).



## 4.3 Bangladesh



Figure 4.9- Bangladesh (Source: CIA World Factbook)

*After the War of Liberation, Bangladesh gained its independence from Pakistan in 1971 and was founded as a democratic and secular country. Political dynasties have since characterised the power alternation between the coalitions of the centre-left Awami League (currently ruling) and the coalitions of the centre-right Bangladesh Nationalist Party (BNP). Both parties have at times drawn electoral alliances with Islamist parties, for example Jamaat and Khilafat Majlis (ICG, 2015). Of particular relevance to how Bangladeshi media market is segmented are: a socioeconomic urban-rural divide; a predominantly Muslim population; a dominant national language, Bengali, with English used as a second language by elites. These variables interact with political polarisation, media corporate ownership and restrictive laws to shape the landscape of media capture. According to FH, media freedom in Bangladesh has declined in the past five years, with the country receiving an overall press freedom label of “not free.”*

“Journalists are instrumental for the government in hunting other journalists in opposition.” – Interviewee 6

4.3.1 Media Market

Bangladesh is considered by all interviewees as having a “vibrant” media market: there is a variety of privately owned newspapers, TV channels, radio stations and growing Internet access. Before 1990, media access was limited to newspapers and heavily Dhaka-centred due to poor infrastructure and low literacy in rural areas. The government perceived economic growth in the 90s as legitimating its rule and allowed media market liberalisation (Interviewee 4, 2017). Currently TV, including terrestrial, satellite and cable, has the largest market share with over 70% of the population (Shoesmith et al., 2013). It is followed by print, radio, and Internet. However, print media (referring to newspapers here) and the Internet are more important for capture due to the former’s policy-agenda-setting power and latter’s role in recent fundamentalist-instigated social unrest. The following graph shows the importance for capture relative to market share.

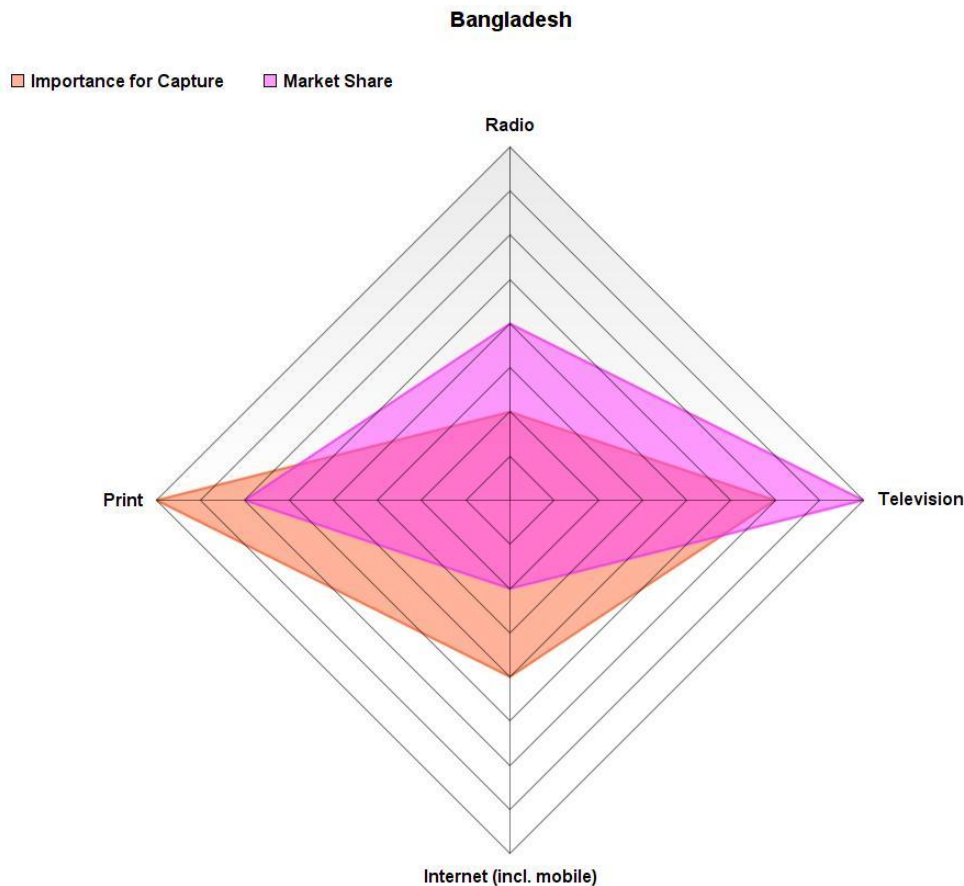


Figure 4.10- Media Capture vs Market Share, Bangladesh

Newspapers are numerous and predominantly in Bengali. A CDAC network report (2012) shows that of the 27% of the population who read newspapers at least once a week, the majority are men in urban areas. As of 2012, 467 newspapers were registered,

of which 314 were dailies with nationwide reach. Most of the 128 national dailies are city-based and owned by one of seven business conglomerates (BBC Media Action, 2012). Topics covered include politics, social injustice, administrative irregularities, corruption, sports and entertainment (Interviewee 7, 2017). *ProthomAlo* is the Bengali daily with the largest circulation at 500,000 per day. Three print-runs occur daily to serve remote rural areas, other major cities and Dhaka respectively. The corporate owner of *ProthomAlo*, Transcom Group, also owns the most popular English newspaper *Daily Star*, circulated at 40,000 per day. There are more than 20 other licensed English newspapers.

Television has grown to be the most accessible source of news and entertainment. 91% of the urban population have access to personal televisions and 67% of the rural population watch television (CDAC network, 2012). The free of charge, state-run BTV is the mouthpiece of the ruling party and dominates the airwaves in rural areas. The 25 privately licensed satellite TV channels (BTRC, 2016) remain an urban phenomenon due to limited satellite penetration in the countryside. Several foreign channels cater to English-speaking audiences, including Home Box Office and Discovery Channel (Genilo and Shafi, 2013). Talk shows in Bengali are popular and cover topics including elections, mismanagement of public resources, social injustice, and the right to information.

Radio is no longer an important source of news. Its listenership declined to 15% of the population in 2011 (CDAC network, 2012); the listenership was slightly higher among rural residents as radio still penetrates the poorest segments of society. The state-owned *Bangladesh Betar*, while being the single largest public service broadcaster, is perceived as partisan and serving government interests rather than the needs of the public (Mishbah, 2013). Despite ongoing debate on allowing *Bangladesh Betar*'s independence, the government maintains control over its news and current affairs broadcasting. As of 2011, there were only five private commercial stations which urban dwellers tune in to for music, talk shows, and interviews (CDAC network, 2012). There are 14 licensed, largely underdeveloped community stations (BTRC, 2016) reliant on donor funding.

Internet penetration is increasing under the government's "Digital Bangladesh by 2021" programme (Interviewee 5, 2016). 14.4% of the population (World Bank, 2015),

mostly young, urban residents, have access to the Internet. A CDAC network report (2012) finds that the diaspora and the educated middle classes are heavy users of online newspapers. Social media, including Facebook and Twitter, is popular. Blogging in both English and Bengali on religious issues has increased.

### 4.3.2 Media Capacity

The variety of media does not translate into a plurality of voices. Limited media capacity due to media experts' shortage and media dependence on corporate funding and advertisement is mentioned by all interviewees as driving media capture in Bangladesh. Infrastructure, while still limiting access to media in the countryside, is rapidly improving thanks to economic growth.

Low journalism quality undermines the media's watchdog role and lowers the costs of media capture, especially in a strict legal environment. Media organisations fall short of setting standards for their own journalists. Unverified media reporting harms even the most reputable media outlets - this, interacting with institutional factors, can lead to backlash from the government. Journalists have been prosecuted on technical details or for using unverified sources (Interviewee 6, 2017). The editor of the *Daily Star* has been charged with treason due to uncorroborated reporting on corruption allegations of the current Prime Minister (BBC, 2016). TV programmes and community radio also face a shortage of media experts. Some of the interviewees noted that there is an absence of critical and analytical perspectives in TV reporting, making newspapers the only source of in-depth analysis. Some license-holders of community radios are advocates rather than media professionals and this hinders their ability to serve the public interest.

A lack of audience revenues leads most media organisations to depend on direct funding from corporate owners and advertising. This results in media self-censorship and an unwillingness to produce content against major business interests. Furthermore, government can punish "hostile" media outlets by pressuring companies, who benefit from maintaining good relationships with the authorities, to divert advertising. *ProthomAlo* and the *Daily Star*, two independent newspapers that have widely reported on corruption and civil rights issues, suffered major financial losses as the authorities

“persuaded” up to 13 firms to stop advertising with them (Interviewee 6, 2017; Interviewee 7, 2017). Private TV stations largely fail to provide quality journalism and pluralistic opinions. Under financial pressure to attract commercial advertisements to mitigate high set-up costs and fund erations, licensed programmes adopt a “populist” approach to compete for viewership rather than being geared towards the public interest.

### 4.3.3 Socioeconomic Factors

There is a persisting urban-rural divide: 1/3 of the population live below the national poverty line and 65.7% live in rural areas (ADB, 2014). This differentiates audiences in terms of who have access to media and their relative importance for capture.

Despite limited readership, newspapers have long been involved in Bangladesh’s politics and enjoy readership among the urban middle-class. Print circulation has increased in recent years alongside the digitalisation of all major dailies due to improving literacy levels and improving purchasing power (Interviewee 4, 2016; Interviewee 7, 2017). Their importance in shaping national affairs has led newspapers to come under close government supervision and indirect capture.

While urban residents no longer use radio as a main source of news, radio reaches the poorest segments of the population and the government can easily capture its rural audience through the state-run radio channel.

### 4.3.4 Demographic Factors

Bangladesh is a largely homogeneous country: of its 157 million population, 90% are Muslim and 98% speak Bengali and are of the Bengali ethnicity (World Bank, 2016; CIA, 2015). The media market reflects this homogeneity: national TV channels and newspapers serve large parts of the population. In this context, small demographic differences can be overridden: radio has declined partly due to lack of programmes in local dialects (Genilo et al., 2013). This homogeneity lowers the cost to government and corporate owners to engage in non-coercive capture across media platforms. However, the small fraction of English speakers and Islamic fundamentalists make some media more salient for capture.

English is used as a second language in government, the private sector, NGOs, higher courts, and universities (Shoemith and Mahmud, 2013). According to interviewees, the government keeps a close eye on English newspapers as they are influential in setting the policy-agenda. Authorities are also sensitive to foreign media used by the diplomatic community, particularly when they report on issues (such as labour rights) that impact Bangladesh’s international reputation.

The recent rise in fundamentalist activities has posed new challenges to media freedom in Bangladesh. While founded as a secular country, there have always been religious tensions in the predominantly Muslim country. Some fundamentalists have demonised bloggers critical of extreme Islamic values (Interviewee 7, 2017). In 2016, the government banned an Islamic TV channel after a deadly attack against civilians (BBC, 2016a). One interviewee said the TV attempted to publish false information to foment fundamentalist sentiments (Interviewee 7, 2017). Indeed, the government has monitored online space more closely as it becomes increasingly concerned about fundamentalists using social media to instigate social unrest. This has been controversial. Some interviewees argue that the government is intervening beyond what is necessary to tackle cybercrime; free expression online has been targeted, leading to arrests and the prosecution of ordinary citizens (Interviewee 4, 2016; Interviewee 6, 2017). Infringements on media freedom are becoming evident since the BTRC set up a cyber-monitoring unit to monitor “harmful” content (ZDNet, 2012; Interviewee 6, 2017). *Internet & Jurisdiction* records show that YouTube was blocked in 2012 due to anti-Islam videos. Facebook, WhatsApp, and other social platforms were suspended temporarily in 2015 in an attempt to stop political unrest in reaction to the death sentence of Islamist political dissidents. Several websites were blocked by the BTRC because of “objectionable comments” about the government.

### 4.3.5 Institutional Factors

All interviewees discussed the importance of institutional factors in lowering the costs for media capture. Mishbah (2013) argues that laws and regulations introduced during the

colonial era still limit press freedom. In the early years of Bangladesh's independence, the government adopted the Printing Press and Publication Act 1973 and the Press Council Act 1974 to regulate newspaper owners and promote standards and conducts of journalism. However, the Press Council is seen to be under undue influence from the government and not fit to oversee journalistic ethics (Interviewee 7, 2017). The Constitution imposes “reasonable restrictions” on freedom of speech and expression. The Special Powers Act 1974 allows the government to arrest and detain any person without specific charges. The Code of Criminal Procedure 1898 allows the police to arrest individuals without a warrant. Some interviewees mentioned that, in recent years, defamation charges (provisioned as a criminal liability) have been increasingly used to prosecute journalists for reporting on sensitive issues including corruption, crime, and human rights violations. There are also taboo areas for reporting, namely any topics on the Prime Minister, her family, and any ministers or military officials. It is common for journalists to face physical intimidation from political parties, religious extremists, the police or the military. This has led to self-censorship by editors and journalists. (Interviewee 6, 2017; Interviewee 7, 2017)

A deeply polarised political environment divides the media along party lines. This intersects with corporate media ownership to enable capture both through political interests and through government-aligned business interests. Costs are low to exert subtle governmental pressure over private advertisers and corporate media owners, and there is less need for crude forms of censorship.

Newspapers have sided with political parties since the British period; television and radio became part of the media system only in the past decade and it is almost impossible to avoid taking sides (Mahmud, 2013). “All apart from one or two [media] are loosely standing by one side or the other” (Interviewee 5, 2016). A recent ICG report (2015) sheds light on the continuous rivalry between AL, who draws on democracy and secularism, and BNP, who appeals to Bangladesh's religious and territorial identity. This polarisation leads to divisions within the journalist community: current leaders of the two Journalists' Unions are political advisers to the AL and the BNP respectively. The divide is such that journalists could be “instrumental” for the government to keep an eye on

journalists in the opposition (Interviewees 6, 2017; Interviewee 7, 2017). This polarisation creates a political vacuum for the rise of fundamentalist parties, which tips the balance of power. This political dynamic underlies government control over market entry into the television broadcasting market. TV licenses are used as a tool by the Bangladesh Telecommunication Regulatory Commission (BTRC) to favour businesses with a pro-government stance. Given the power alternation, granting TV licenses allows the incumbent to control the news and even makes it possible for them to maintain influence when in opposition (Mohaiemen, 2013). For example, Shoesmith et al. (2013) show that between 2001-2006, the BNP government issued licenses widely, including to *Diganta TV*, owned by a leader of Jamaat Party, and *Islamic TV*, owned by the brother of the BNP leader. Upon coming into power in 2008, the AL government awarded 12 TV licenses to businesses loyal to the party, including *Independent Television*, owned by the advisor to the AL leader, and *Channel 24*, owned by a pro-AL businessman. On the other hand, the licenses of *ATN Bangla* and *ETV* - issued by the AL - were revoked for “technical reasons” by the BNP when it came into power in 2001. There were other reported suspensions of TV stations by incumbent governments due to their pro-opposition stance (CDAC network, 2012).

Non-coercive capture also happens through government-aligned business interests. Most media organisations in Bangladesh are owned by seven business conglomerates, several of which are also large advertisers (BBC Media Action, 2012). Few media outlets make profits on their own; instead they are heavily reliant on revenues from companies’ advertisements and funding from their corporate owners. Editorial independence is undermined by owners’ direct interference with reporting and publishing – objecting to reporting on issues contrary to owners’ business interests. Access to resources such as cameras can be denied if journalists attempt or manage to cover stories owners do not like, leading to strong self-censorship among media practitioners. Furthermore, there is a perception among those interviewed that conglomerates use the media as an instrument of influence to bargain with authorities and advance business interests. This bargaining is effective as political parties receive donations from big businesses (Daily Star, 2013; Interviewee 7, 2017), and business owners hold direct or indirect political interests (Mahmud, 2013). Some media owners become politicians, for



## Chapter 4 – Country Case-Studies

example the owner of Beximco Group, who owns the second largest English Daily *Independent*, is now an adviser to the PM on private sector development (bdnews 24, 2016).

4.4 South Africa



Figure 4.11- South Africa (Source: CIA World Factbook)

*Formerly under Dutch and later British control, South Africa became independent in 1931. Racial policies begun during the colonial period were institutionalised and state sanctioned segregation, known as apartheid, separated society into three races with corresponding rights and limitations. The 70s and 80s were marked by violent protests against apartheid and government crackdowns on dissenters and the media despite domestic and international opposition. Following negotiations in the early 90s, universal elections were held for the first time in 1994 and Nelson Mandela of the African National Congress (ANC) was elected as the first black president of the country. Under his leadership, a new constitution was adopted in 1997 and the Truth and Reconciliation process began. According to FH, media freedom in South Africa has fluctuated little since 2012, with the country receiving an overall press freedom label of “partly free.”*

*“South Africa is divided among those who tweet and those who can’t eat.” -Khadija Patel*

#### 4.4.1 Media Market

Radio maintains the largest market share reaching approximately 92% of the adult population (SAARF, 2016). Commercial radio reaches 88.6% of adults while community radio as a whole reaches 25.3% of adults (SAARF, 2016). Television has the second largest market share, reaching approximately 91% of the adult population (SAARF, 2016). It is a tightly regulated sector dominated by the public broadcaster, the South African Broadcasting Corporation (SABC), which is comprised of three TV channels and eighteen radio stations.

Newspapers, however, are considered by both academics and practitioners as the most important medium for creating high quality news and for its agenda-setting power. It is the main news source to those in LSM 8-10 (Living Standards Measure)<sup>1</sup>: academics, economic elites, opinion leaders, politicians and policy makers, and business people.

A rapid spread of Internet technology is enabling online news access. 80.6% of LSM 8-10 has access to a smartphone (LSM 5-7: 77.8%, LSM 1-4: 21.8%) (SAARF, 2016). 18.5% of South Africans have a laptop at home, followed by 9.3% with a desktop, and 8.9% with a tablet (SAARF, 2016). The Internet penetration rate is 51.9%, among the highest in the continent (World Bank, 2015).

Despite exponential growth in newspaper titles since 1994, ownership in the media market is highly concentrated and content is very uniform. The financial and political strain on the sector complicates entry for new players and has resulted in homogenous content. Another common criticism of South African media is that it caters to the middle class and neglects marginalised communities.

Figure 4.12 represents the market share of the respective media formats and their relative importance for capture.

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<sup>1</sup> LSM is a demographic index of the South African population used since 1984 (1 lowest; 10 highest).

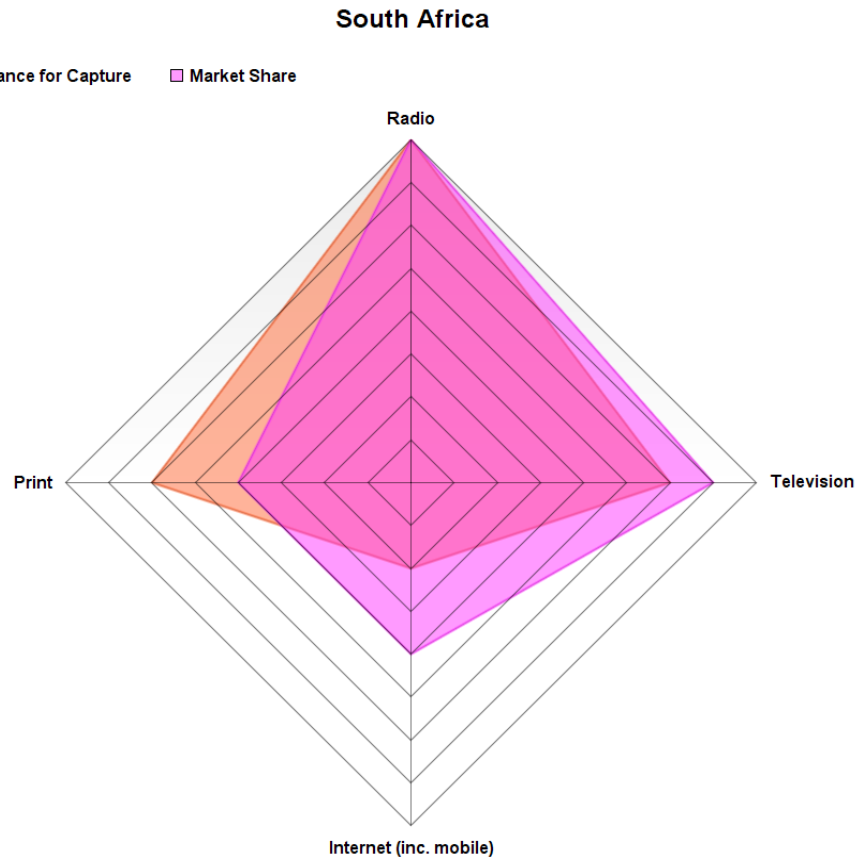


Figure 4.12- Media Capture vs Market Share, South Africa

#### 4.4.2 Media Capacity

Foreign aid was critically important during apartheid as it sustained anti-apartheid newspapers and community radio stations. After 1994, however, aid was either withdrawn or redirected and only one of the main four newspapers of that time is still in publication today (Lloyd, 2013).

The sector now faces significant funding challenges as content moves online and becomes more widely available across different platforms, forcing media outlets operating in different formats (e.g. print vs. online) to compete for audiences. Resource constraints due to a lack of audience-generated revenues have had a detrimental impact on staffing across different media formats (for example, interviewees pointed out newspapers are now forced to function with “skeletal” staffs). Resource constraints have also resulted in the “juniorisation” of newsrooms as qualified journalists’ salaries are unaffordable for media outlets (Ephraim, 2017; Pather, 2017). The loss of audience revenue has redefined the print sector in particular as it seeks to cope with changing

audience preferences (for example, younger audiences desire more content in short video formats) and revenue models and the funding gap is now filled by commercial and advertising revenue which represents 60-100% of the cost of publishing (PDMTTT 2013). As a result, media outlets in South Africa are increasingly biased towards advertisers' preferences.

Restricted funding makes media outlets vulnerable to external influence and is a major threat to publishers' independence. Media capture can be driven by economic interests (i.e. being unwilling to publish stories about owners or commercial allies), but it can also be politically motivated due to connections with the ANC or public officials. This is seen in the refusal to publish content that could tarnish those connections and both the resources and influence they promise. Thus while intimidation is not uncommon, censorship in South Africa is mainly present in non-coercive forms; that is, journalists and reporters are aware of corporate ties to government which leads to self-censoring (Ephraim, 2017).

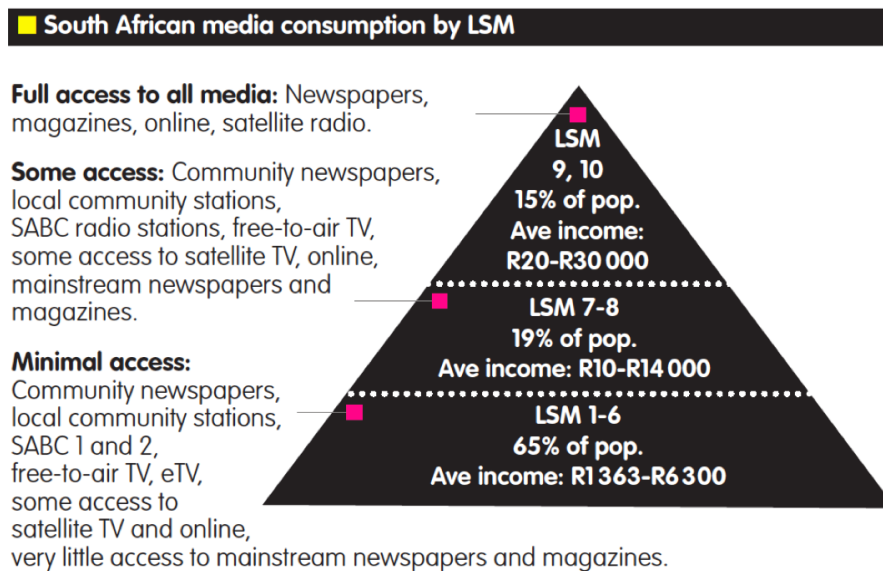
The severe financial and political strain that the media sector is under creates an easy avenue for media capture as media outlets' reliance on government and commercial advertising has resulted in a risk-averse sector that must avoid disturbing its funders or otherwise risk closure due to the withholding of funds (Tromp, 2017). In such an environment, there are high barriers for entry for new players which include difficulty of access to advertising income, capital, and funding.

### 4.4.3 Socioeconomic Factors

In South Africa, socioeconomic factors are the most salient determinants of the demand for information. Despite economic development, society remains highly unequal: 60% of the population lives below the poverty line (Reid, 2017) with 10% of South Africans experience extreme poverty, 30% of the workforce is unemployed, and only 11.8% complete higher education (BBC, 2012). These socioeconomic factors (often correlated with race) profoundly impact the media market as a lack of resources severely undermines citizens' ability to access information.

High literacy rates of more than 95% (SAARF, 2016) do not correlate to high newspaper readership; newspaper readership remains only at approximately 30% due to expensive subscription prices (Milton, 2016; Bird, 2017; Tromp, 2017). Similarly, despite high Internet penetration, quality access is restricted by high data costs and 71.9% of consumption is concentrated in LSM 8-10 (SAARF, 2016). The country’s purchasing power is primarily concentrated in urban centres which tend to be more educated and benefit from greater economic opportunities and thus have the greatest access to information.

Only 15% of the population (those in LSM 9-10) has full access to all media (PDMTTT, 2016) implying that a majority of the population relies on freely accessible information provided by the state or subsidised through commercial outlets. With access to other media types constrained to urban elites, the state can rather costlessly capture media for the majority of the public via the politically-biased state broadcaster: the SABC reaches half the population daily (Bird, 2017) and is the sole source of news for approximately 21 million South Africans (predominantly in the lower six LSMs) (Milton, 2017).



Source: South African Advertising Research Foundation.

Figure 4.13- South African Media Consumption by LSM (SAARF, 2015).

### 4.4.4 Demographic Factors

Socioeconomic factors are closely interconnected with demographic ones in South Africa. It has a population of 55 million which is ethnically composed of 80% Black African, 8.8% mixed race, 8.4% White, and 2.5% Indian/Asian (South African Statistics, 2012). Decades of state-sponsored racial discrimination has resulted in gross inequality with long-term economic ramifications which can be traced along ethnic lines; in 2012, the average income of black households was less than 1/6<sup>th</sup> than white households (BBC, 2012). Demographic segregation therefore leads to and is further deepened by unequal economic opportunities which result in unequally distributed purchasing power and access to media.

65% of the population lives in urban centres (World Bank, 2015) where printed press is most heavily concentrated. This implies that the primarily black rural population is not served by print publications. Moreover, this contributes to the importance of radio as the country's strongest broadcasting medium due to its ability to breach the rural/urban divide. Television is similarly unconstrained by geography and reaches approximately 91% of the adult population (SAARF, 2016) and because the SABC is the broadcaster with the greatest reach, television is the medium through which the government is most easily able to restrict information freedom for the largest audiences.

Lastly, while there are 11 official languages with many more spoken across the country, English is the primary language of the media. In rural areas where African languages are most prominent, the most popular print titles are still either in English or Afrikaans which are more prevalent in urban areas (PDMTTT, 2016). This further strengthens the importance of radio and television as these media use African languages and can therefore more easily reach audiences who speak different languages. Because the SABC provides programming in African languages and the majority of the South African population does not speak English or Afrikaans as a first language, the SABC is the dominant provider of information for non-English and non-Afrikaans speakers who are therefore under a larger threat of capture through government control of the SABC (Bird, 2017).

### 4.4.5 Institutional Factors

While freedom of the press and expression are enshrined in South Africa's constitution and bill of rights, it also inherited apartheid-era censorship laws which remain unchanged. Despite the development of the sector after democracy in 1994, many challenges remain and recent years have seen attempts at regulation reminiscent of apartheid (i.e. heavy censorship of any content against government policy). The ANC, which has been in power since 1994, currently faces its lowest approval ratings. Allegations of corruption and abuse of power have mired the party's image leading to growing distrust from the population. The government's decreasing popularity is mirrored by an increase in censorship, both overt and covert. Journalist Verashni Pillay wrote: "Fast forward 25 years later, and it's the same story with a different cast: the party that fought for a free South Africa turned into a government using similar censorship tricks on its media." (Lloyd, 2013: 8).

Despite the presence of a few independent publishers and variety of titles, the print sector remains highly concentrated and 90% of the market is controlled by the "Big Four," i.e. Media 24, Times Media Group, Independent, and Caxton (PDMTTT, 2013). Additionally, the market's vertical integration implies that the numerous stages of the product (content, printing, advertising, and distribution) are under common ownership; centralised control over the supply process implies smaller outlets must rely on their competition to serve their production needs (PDMTTT, 2013). The high concentration of the media market therefore considerably limits incentives for entry and hampers potential opportunities for new players.

The strong political bias of pro-government outlets such as *the New Age* (whose owners, the Gupta family, have close ties to President Zuma) has complicated the impartiality of the media sector and resulted in a polarised media market and also in societal backlash where outlets are perceived as either for or against the ANC (Milton, 2016). This polarisation is further fuelled by the aforementioned funding challenges and results in a lack of diversity of viewpoints. Recent popular criticism on the government (for example, President Zuma having been found to spend public funds on a private mansion) has resulted in increasing surveillance of the media; the government has been



found to increasingly monitor journalists and political activists. While those working for independent investigative newspapers might not be specifically threatened with losing their jobs, harassment, wrongful arrests or death threats are not uncommon, resulting in self-censorship amongst journalists.

The Independent Communications Authority of South Africa (ICASA) was established in 2000 and regulates both the telecommunications and broadcasting sectors in the public interest. Among other things, it is responsible for licensing, creating regulation, and ensuring compliance with license conditions. The Media Development and Diversity Agency (MDDA) was created in 2002 to promote diversity in language and content among other initiatives. It has supported new media start-ups and community agencies but is severely underfunded and under capacitated to effectively realise its mandate. ICASA, SABC, and MDDA along with the Film and Publication Board are all overseen by the Minister of Communications, a direct presidential appointee. The compromised independence of these agencies has seen them captured and under-capacitated.

The SABC in particular is subject to direct government interference and the ruling party has the power to select the SABC board. Examples of misconduct that emerged during SABC parliamentary hearings include violations of standard protocol and breaches of public trust, mismanagement of funds, de-establishment of the public procurement process, the former COO Hlaudi Motsoeneng's abuse of power by making himself Editor in Chief of the broadcaster, and later his "Sunshine News" quota requiring 70% of content had to be positive news (Skinner, 2016). During the last elections, the SABC refused to run opposition party campaign advertisements and, citing concerns of contributing to the spread of unrest and violence, refused to show footage of protests. Given these circumstances, self-censorship is prevalent amongst journalists and editors who are unable to voice any dissenting opinions without fear of reproach. Eight journalists were fired in 2015 for critiquing SABC management and pursuing stories that were "against company interests" (Phamodi, 2017). Viewer and listenership numbers have recently decreased and reflect a popular mistrust of the SABC following the wave of scandals and exposure of mismanagement.

Increasing access to smartphones and data represents an incredible opportunity for widespread access to information. However, it risks being undermined by proposed legislation such as the Cyber Crimes Bill, the Draft Online Regulation Policy, and the Film and Publications Board Amendments Act. These proposed Internet bills would put in place a new regulatory framework to tighten control on online news media. Additionally, the proposed Secrecy Bill would criminalise possessing or divulging information that is deemed important to national security, placing significant restrictions on the press's ability to act as a government watchdog. Furthermore, the ANC has also insisted on promoting the Media Fields Tribunal which would have a significant chilling effect on the quality of the media if journalists begin to be sanctioned for stories. This culture of secrecy, silencing, and using legislation to limit press freedom marks a turning point in South Africa (Pather, 2017). Even if the proposed legislation does not ultimately pass, such proposals have a long-term potential of gradually eroding press freedom and normalising restrictions to press freedom (Bird, 2017).

## Chapter 5 Recommendations and Conclusions

The section below follows a two-part structure. The first part presents a discussion of the challenges and opportunities for analysing the relationship between media freedom and good governance through quantitative methods. This is followed by a set of recommended policy interventions organised to address each of the four “drivers” structuring the costs of media capture in each of the four case-study countries contained in this report. It is important to note that interventions in any of the four categories of drivers will have an enabling or constraining impact on the other drivers.

### 5.1 Evaluating Media Freedom and Good Governance

This report has analysed factors driving media supply and demand in South Sudan, Tanzania, Bangladesh and South Africa. It has shown that media development and capture are specific and endogenous with media capacity and a country’s socioeconomic, demographic and institutional factors. Changes in the magnitude of these different drivers are correlated, all having an impact on media outcomes. For example, household income both affects and is affected by media freedom. Consolidated and corporatized media ownership combined with low audience revenues can negatively affect media capacity by increasing media outlets’ reliance on corporate funding and restricting financial independence. Establishing causality between drivers and media outcomes calls for careful consideration of the mechanisms underlying media market supply and demand. Heterogeneous country circumstances also require one to construct and interpret the outcomes differently to assess in-country media freedom.

DFID (2011) has suggested a set of indicators in assessing media as a component of good governance:

1. % media owners satisfied with regulatory framework
2. % target population who use media as primary source of information (disagg)
3. % targeted citizens satisfied with media quality (disagg)

Understanding country-specific contexts highlights limitations in these indicators. The first indicator would introduce significant biases in signalling the quality of media

law where media owners are politically connected and benefit from a restrictive environment. For example, in Bangladesh, conglomerate owners of media outlets use the media as a tool to negotiate business deals with government officials or to gain public influence for future political careers. This bias could be hard to control for in regression analysis. The second and third indicators are likely to be endogenous with socioeconomic factors, such as education and a household's income level (UNESCO, 2008); education and income are also correlated with each other.

DFID (2006, 2011) defines media as part of good governance. Media freedom increases political participation (Leeson, 2008), reduces corruption (Färdigh et al., 2011) and is positively correlated with overall governance performance (UNESCO, 2008). These studies have correctly sought to control for a set of explanatory variables (including GDP, political systems, religion, historical and cultural characteristics) to isolate the impact of media freedom on good governance. Challenges, however, remain in establishing the causal impact of media freedom on good governance given endogeneity concerns. As this report has shown, media freedom is endogenous with country-specific variables and with other DFID indicators (2011) for good governance (e.g. corruption). There is value in constructing relevant and exogenous instrumental variables to tease out the impact of media freedom. While it is relatively straightforward to find an instrument correlated with the explanatory variable of media freedom, it is implausible for the instrument to be completely exogenous to the outcome variable of good governance. Bearing this in mind, external interventions impacting media capacity (e.g. the introduction of a UN radio station) are more likely to be credibly exogenous instruments than institutional factors inside the country (e.g. adoption of new media laws).

These concerns around country-specific endogeneity lead to two general recommendations regarding DFID's political economy analysis (2016) survey. This survey aims to collect information to bridge the gap in quantitatively understanding and decoding media freedom. This report suggests:

- It is important to construct explanatory and outcome variables reflecting country heterogeneity in assessing media freedom given that media development and

capture, as well as their relationship to good governance outcomes, are specific to the historical and developmental contexts of each country.

- Complementing this survey of journalists and media outlets’ owners with surveys of audiences. As this report has shown, media capture and its effects can be understood as arising from both supply- and demand - side factors. Therefore, any good governance outcomes that are of interest in any country studied will need to capture factors that affect both.

### 5.2 Facilitating Good Governance through the Media – Proposed Policy Interventions by “Driver”

#### 5.2.1 Media Capacity

Common factors affecting media capacity across the four case study countries have been the inability of media outlets to secure sustainable sources of funding and a lack of adequate infrastructure for media development. This should be addressed in response to country-specific contexts.

In South Sudan, simply installing one additional printing press owned and operated cooperatively by print media outlets would greatly increase circulation, and would multiply the points at which the government would have to capture print content. Additionally, as media outlets often cite energy requirements as a bottleneck for development, providing alternative sources of power (e.g. solar) could benefit community radio stations for example.

In Tanzania, supporting the Tanzania Community Radio’s Network by providing managerial skills development courses would assist with budget management for radio outlets to withstand funding cuts from international donors. Again, this links into institutional factors as financially secure outlets are less likely to rely on government transfers to stay afloat and are thus more likely to maintain editorial independence.

In Bangladesh, immediate assistance should provide training for media practitioners and help media organisations establish and comply with reporting standards and ethics. This would help journalists produce watertight stories, protecting them from

government prosecution due to unverified reporting. In the long-term, continuing to support political participation and civic engagement is recommended. Proliferation of political opinions among the public will drive a more professional media to overcome deep political divisions and biases.

In South Africa, funding sources should be diversified and alternative mechanisms and schemes introduced to ensure outlets' independence from political and commercial influence and reduce their reliance on advertising revenue. This report proposes the creation of a “trust” or “endowment” cooperatively managed by independent media outlets.

### 5.2.2 Socioeconomic Factors

In terms of socioeconomic factors, increasing education quality and access to education is correlated with increasing incomes and thus influences both audience demand for information as well as their ability to pay for media.

In South Sudan, the ongoing civil conflict severely restricts opportunities for media development. Media development in this context may be encouraged through non-political reporting, especially on health-related issues. For example, in Uganda, the Straight Talk Foundation distributes print publications addressing reproductive health and development issues for youth. The distribution of such publications (ideally at no cost to the consumer) in South Sudan would not only help to promote positive developmental outcomes in terms of health, but also help to develop the media market as the government has no reason to censor such content.

In Tanzania, where Kiswahili literacy levels are already high, the development of projects such as English in Action (as exists in Bangladesh) would increase demand for English-language media that is less censored and therefore have greater impact than education funding that is not targeted by language.

In Bangladesh, low literacy and purchasing power constrain the rural population's ability to consume print news. Funding projects such as the Bangladesh Education

Development Program (aimed at increasing literacy through primary education) will help to increase demand for information. With economic growth and increased purchasing power in the long-term, print media is likely to collect more audience revenues.

Despite high levels of development in South Africa, social inequalities remain marked and only 49.8% of the population has completed high school and only 4.2% has a college degree (AMPS, 2016). Developing programmes to increase access to higher quality education for poor and marginalised communities, especially in the predominantly Black rural areas, would improve economic outcomes, reduce dependence on the state broadcaster and increase popular demand for information.

### 5.2.3 Demographic Factors

Demographic factors have an impact both on potential audience revenues available to media outlets (in terms of audience size) as well as on the polarisation or marginalisation of specific mediums. However, this report does not argue that policy interventions should lessen demographic divisions.

For example, Bangladesh has a relatively homogenous audience, allowing national media providers to serve large proportions of the population. However, both South Sudan and South Africa have much more segmented markets and audiences due to ethnic and linguistic diversity. In these countries, increasing the availability of local language media is important especially for rural communities that do not use the dominant national languages and are underserved by media outlets. This could be achieved by developing more community radio stations or by providing broadcasting equipment to existing ones.

Rural-urban divides exist in each of the four case-study countries to differing degrees. In every case, these divides have an impact on the ability of media to reach wide audiences and therefore access potential audience revenues. Infrastructure development can facilitate better access to remote areas and increase access to education and economic

opportunities. Infrastructure development has significant impacts for media development in terms of addressing media capacity-related, socioeconomic and demographic factors.

Sub-national media outlets could also be connected with national outlets with larger operating budgets by having national media outlets provide information for local media outlets, freeing smaller outlets to focus on local issues. For example, in Tanzania, supporting projects such as the Media Council of Tanzania's *Excellence in Journalism Awards* could help empower community journalists and encourage higher rates of participation in journalism.

### 5.2.4 Institutional Factors

Institutional factors are perhaps the most difficult category to address directly. Securing media freedom and independence through legislative means is uncertain especially given that all the case-study countries have legal provisions for media independence that are not reflected *de facto*. Therefore institutional change should be addressed through mechanisms outside of domestic laws.

For example, international funding of independent media councils and regulators can strengthen their independence for the long-term, which is important because these organisations allow individual media outlets to have a collective voice in negotiations with governments. This applies particularly in Tanzania, where the voluntary Media Council of Tanzania (MCT)'s funding is under threat of being cut.

It is also important that donor funding be conditional on the implementation of legislation that guarantees the freedom of the press and of expression in practice. For example, Eye Radio in South Sudan is funded by USAID, and this donor relationship was instrumental in negotiations regarding its reopening in 2016 because USAID was able to put pressure on the GoSS through the US government.

Increasing political participation by supporting civil society organisations (particularly those that represent marginalised communities or demographics) is also critical to media development because a strong civil society is positioned to monitor and



## Chapter 5 – Recommendations and Conclusions

expose the activities of self-interested politicians. In countries, like Bangladesh and Tanzania, that are highly politically-polarised, increasing civic participation may be a way to circumvent biases present in the media.

Finally, connecting policy-interventions in non-media sectors (for example, in developmental aid for improving health outcomes) to media development is a promising option for increasing impact in several developmental focus areas at once. For example, in the context of national public health campaigns (such as increasing awareness of and access to vaccinations), involving media outlets in information dissemination can depoliticise the media in general and improve relationships between various governmental departments and the media sector.

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## Appendix A - Terms of Reference

**Client Organisations:** Department for International Development (DFID)  
and World Bank

**Capstone Project** – London School of Economics  
**Supervisors:** Professor Patrick Dunleavy and Dr. Brett Meyer

### Terms of Reference (TOR)

**What influences media capture in Less Developed Countries (LDCs) and how does this present opportunities and challenges for progress in achieving key components of Sustainable Development Goal 16 (covering security and “good governance”)**

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#### Client background

1. The Department for International Development (DFID) is the UK’s international aid and development ministry, one of the world’s largest donors of international aid and a highly respected organisation in the development aid field. DFID’s budget has been protected from (most of) the acute austerity pressures within UK government.

2. The World Bank is an international organisation that offers financial and technical assistance to developing countries. The Bank’s goal by 2030 is to end extreme poverty worldwide by reducing the number of people living on less than \$1.90 a day to 3% of the world’s population and to promote shared prosperity by fostering income growth for the bottom 40% for every country.

3. The LSE MPA programme has a tradition of undertaking capstone projects with different parts of DFID, including an excellent project in 2013-14 on citizen attitudes to government and public services in the Sudan (LSE MPA Capstone, 2014).

#### Study background

4. Following on its long-run and successful involvement with the UN’s Millennium Development Goals (MDGs), DFID is now responsible for coordinating the UK’s interventions and responses to the UN’s current Sustainable Development Goals (SDGs). This capstone project focuses on the relationship between media capture and SDG16, which broadly covers “good governance” and justice, peace and security issues. While they are not focused on explicitly as the outcome variables of interest for this capstone project per se, the sub-goals of SDG16 that generally motivate the project’s aims are:

- Substantially reduce corruption and bribery in all their forms
- Develop effective, accountable and transparent institutions at all levels
- Ensure responsive, inclusive, participatory and representative decision-making at all levels

## Appendix A - Terms of Reference

5. “Good governance” is “not just about government. It is also about political parties, parliament, the judiciary, the media and civil society. It is about how citizens, leaders, and public institutions relate to each other in order to make change happen.” (DFID, 2006) The media is a critical sector in shaping relationships between state and citizens, and key global trends in the media are already leading to changes in country-level governance. Incentives and disincentives driving the media sector can lead the media to play either a positive or negative role in facilitating “good governance”. This project pays particular attention to the role of such incentives driving media capture in fragile and less developed states (DFID, 2008).

6. DFID already has an established track record in projects concerning “good governance” and its relationship to media and media censorship. As well as involvement as a financial backer of local projects (Such as the Media Council of Tanzania’s “Elections Media Monitoring Report) DFID has published papers on the subject of supporting media development, notably, “The Media in Governance: A Guide to Assistance,” (DFID, 2001).

7. Freedom of media is important for “good governance” in several ways. Media is an integral part of “governance” alongside actors such as civil society, the courts and the judicial system. Information quality, availability, and accuracy determines and inform the nature of public debate. As such, media acting in the public interest is critical to “good governance” in terms of states’ *capability*, *accountability*, and *responsiveness* to other actors (DFID, 2008).

8. Media freedom is currently described principally by national-level aggregate scores (such as those provided annually by Freedom House and Reporters Without Borders/Sans Frontiers). Yet media censorship takes place at various sub-levels of a country; for example, media may be censored differently according to *place*, *type of media*, or *demographic audience*. Overseas development/foreign aid organisations currently rely on such aggregate national-level indicators to monitor trends related to the media globally and nationally (see, for example, USAID’s South Sudan Transition Strategy 2011-13) (USAID, 2011). Granular indicators for media censorship are therefore critical for more targeted foreign-aid funding of the media market towards the aim of promoting and facilitating “good governance”.

9. The SDG16 goals are explicitly defined in ways that avoid any reference to the kind of political system being implemented – for instance, being perfectly capable of being met in semi-democracies and some other ‘enlightened’, responsive and constrained forms of authoritarian rule. A political economy analysis (PEA) framework (DFID, 2009) of media capture should therefore be used to answer if and why there is variation in media censorship across different countries, given how the media market has been shaped historically.

### Capstone brief and methods

10. According to DFID PEA is a powerful tool for improving the effectiveness of aid. Bridging the traditional concerns of politics and economics, it focuses on how power and resources are distributed and contested in different contexts, and the implications for development outcomes. It gets beneath the formal structures to reveal the underlying interests, incentives and institutions that enable or frustrate change. Such insights are important if we are to advance challenging agendas around governance, economic growth and service delivery, which experience has shown do not lend themselves to technical solutions alone (DFID, 2009).

11. This project will especially focus on *the role of economic, political and other contextual factors in shaping media freedom and facilitating public discussion in the context of promoting progress on the SDG16 goals*. Often a key reason why fundamental freedoms are infringed, or why “good governance” is undermined by corruption, is that the domestic national or local media cannot report on topics that governments find threatening or unhelpful. The development of effective citizen vigilance against bad governance and rights abuses does not depend solely on there being relatively free media, even in authoritarian regimes or semi-democracies. Many political parties, underground or autonomous social movements and civics-orientated NGOs are widely active and partly effective even in conditions of media unfreedom. Yet even here these organisations often derive a lot of support from foreign media coverage or exiles or expatriate media. But the potential for really effective citizen vigilance and for a robust civil society pressure for “good governance” is clearly far greater they can secure domestic media coverage. It is especially vital that domestic or local media can cover bad governance incidents and symptoms in real time - instead of after the long time-lags and escalating poor situations that may often be involved if only overseas media coverage or publicity via international NGOs occurs.

12. Working in close conjunction with DFID, the project team will:

- a. Undertake a systematic literature survey relating to what drives media censorship and media market segmentation via the lens of PEA and how the interests and incentives faced by different groups in society (i.e. governments, citizens, and the media) shape the opportunities and challenges for improving progress on SDG16’s multiple “good governance” components. This will look at “global” political economic theories of media censorship as well as academic literature focused on the media environment in each of this project’s case-study countries.
- b. Undertake exploratory analyses of individual case-study countries through qualitative interviews. There is no scope for direct quantitative analysis, but the group should work to inform the analysis of DFID’s global media metrics dataset in the future. We will focus on qualitative analyses of case-study countries and the DFID/World Bank focus countries here are: South Sudan, Tanzania, South Africa, and Bangladesh.
- c. Make recommendations to DFID for ways forward in rigorously assessing media censorship and media market segmentation at the sub-national level both in terms of analytical approaches to a global media metrics dataset and

supported by anecdotal evidence primarily gained through interviews from the four case-study countries.

### **Timetable and logistics**

13. The opening meeting with our DFID contact, Dr Alexander Hamilton, will take place on October 5th 2016, and Craig Hammer may be able to video link in. A ‘course correction’ meeting with Dr. Hamilton will take place on December 14th 2016.

14. In addition to these two meetings, a mid-term catch-up meeting with Dr. Hamilton and Craig Hammer will take place on November 8th 2016. The meeting will serve as an update on the state of research.

15. There will be a final presentation of the Capstone report to DFID (and the World Bank via video) on March 3, 2017 in London. The final report will be submitted on March, 9, 2017.

16. The LSE supervisors will be Professor Patrick Dunleavy, who will lead on the project in Michaelmas Term, and Dr Brett Meyer, who will lead during Lent Term.

17. The contact person at the London HQ of DFID is Dr Alexander Hamilton, who is coordinating the department’s response on measuring progress on SDG16. His email is: [alexander-hamilton@DFID.gov.uk](mailto:alexander-hamilton@DFID.gov.uk)  
His LinkedIn profile is here: <http://bit.ly/2cyFSEF>

Alex is an MPA alumnus, from one of our pioneering year groups, who moved from LSE to complete a political economy D.Phil at Oxford University. He was then a consultant at the World Bank, before joining DFID. He served in DFID’s office in the Sudan for some years (and supervised an earlier MPA capstone there), before returning to DFID headquarters.

18. On this project DFID will also be working closely with World Bank, who are their implementing partner. Our contact there is Craig Hammer. His email is: [chammer@worldbank.org](mailto:chammer@worldbank.org)

Craig leads the World Bank Institute’s Global Media Development program, a partnership- driven initiative which focuses on information and media as drivers of “good governance”. See: <http://blogs.worldbank.org/team/craig-hammer>

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## Appendix B - Interviews List

### Appendix B – Interview List

<b>Country</b>	<b>Name</b>	<b>Capacity</b>	<b>Sector</b>	<b>Date</b>	<b>Interview method</b>
Bangladesh	<i>(anonymity requested)</i>	Visiting Professor-in-Practice	A	29/11/2016	Skype Interview
Bangladesh	<i>(anonymity requested)</i>	Senior Economist	A	20/12/2016	Skype Interview
Bangladesh	<i>(anonymity requested)</i>	<i>(anonymity requested)</i>	C	31/1/2017	Skype Interview
Bangladesh	<i>(anonymity requested)</i>	<i>(anonymity requested)</i>	P	30/1/2017	Skype Interview
Generalist	Charlie Beckett	Professor, LSE Department of Media and Communications	A	25/11/2016	In person interview at LSE
South Africa	E A (Teddy) Brett	Visiting Professor, LSE Department of International Development	A	28/11/2016	In person interview at LSE
South Africa	Wendy Willems	Assistant Professor, LSE Programme Director Media and Comms	A	6/12/2016	In person interview at LSE
South Africa	Julie Reid	Project Director, Media Policy and Democracy Project	A	8/12/2016	Skype Interview
South Africa	Viola Milton	Project Director, Media Policy and Democracy Project	A	12/12/2016	Skype Interview
South Africa	Kate Skinner	Member of Support Public Broadcasting (SOS) Coalition and Freedom of Expression Institute	C	15/12/2016	Skype Interview
South Africa	Sekoetlane Phamodi	Former CEO, Support Public Broadcasting (SOS) Coalition	C	26/1/2017	Skype Interview
South Africa	Jayshree Pather	Former Director, Right to Know Campaign	C	30/1/2017	Skype Interview
South Africa	William Bird	Director, Media Monitoring Africa	P	6/2/2017	Skype Interview
South Africa	Beauregard Tromp	News Editor, Mail & Guardian	P	7/2/2017	Skype Interview
South Africa	Khadija Patel	Editor-in-Chief, Mail & Guardian	P	7/2/2017	Skype Interview
South Africa	Adrian Ephraim	Digital Editor, Independent Group	P	9/2/2017	Skype Interview
South Sudan	Ayaa Irene	Member of South Sudan Media Authority; Lead Media Development Officer for the Association for Media Development In South Sudan (AMDISS)	C	31/1/2017	Skype Interview
South Sudan	Avery Hancock	Former member of UN Mission in South Sudan	C	06/12/2017	Skype Interview
South Sudan	Alfred Taban	Editor-in-Chief, Juba Monitor Newspaper	P	21/2/2017	Skype Interview

## Appendix B - Interviews List

South Sudan	Juma John Stephen	Director, BBC Media Action (South Sudan)	P	21/2/2017	Skype Interview
South Sudan	Lily Nelson	Programmer, South Sudan TV/Radio	P	23/2/2017	Skype Interview
South Sudan	Koang Pal Chang	Director, Eye Radio	P	24/2/2017	Skype Interview
South Sudan	Waakhe Simon	Senior Reporter, Voice of America (Radio)	P	24/2/2017	Skype Interview
Tanzania	Katie McIntosh	OPM Office Tanzania	C	15/12/2016	Skype Interview
Tanzania	Deus Valentine	Manager of the secretariat of the Development Partners Group Tanzania	C	17/02/2017	Skype Interview
Tanzania	<i>(anonymity requested)</i>	Former Tanzania Media Council Employee	C	21/02/2017	Skype Interview
Tanzania	Justice Rutenge	LSE MSc Media, Communication, and Development candidate; columnist for the Citizen; owner of the only political satire show in Tanzania	P	16/02/2017	In person interview at LSE
Tanzania	Clare Clancy	Journalist at the Citizen	P	09/01/2017	Skype Interview
Tanzania	<i>(anonymity requested)</i>	Journalist in Tanzania	P	13/01/2017	Skype Interview
Tanzania	Eric Kalunga	Former journalist, media advocate at Swiss Embassy	P	07/02/2017	Skype Interview
Tanzania	Mpoki Thomson	Editor at The Citizen	P	16/01/2017	Skype Interview
Tanzania	Helena Vieira	Former press officer for School of St. Jude, current managing editor of LSE Business Review	A	07/12/2016	In person interview at LSE
Tanzania	Absalom Kibanda	Former Tanzania Editor's Forum Chairman, Managing Editor Habari Corporation	P	15/02/2017	Skype Interview
Tanzania	Deo Mushi	Former senior editor; Daily News, senior correspondent, columnist	P	15/02/2017	Skype Interview
Tanzania	Leah Mwainvekule	Former Editor, Mtanzania, columnist	P	16/02/2017	Skype Interview
Tanzania	Ansbert Ngurumo	Media consultant and political commentator	P	17/02/2017	Skype Interview

A – Academic; C – Civil Society; P – Media Practitioner