

AFRICA'S

MEDIA DEFICIT

AND ACCESS TO

KNOWLEDGE

BRIEFING PAPER



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Background

Access to information is a fundamental human right. Article 19(2) of the International Covenant on Civil and Political Rights¹ (ICCPR) links the right to information to freedom of expression includes the right to information:

“Everyone shall have the right to freedom of expression; this right shall include freedom to seek, receive and impart information and ideas of all kinds, regardless of frontiers, either orally, in writing or in print, in the form of art, or through any other media of his choice”.

Citizens need knowledge, information and opinions from media to participate in the life of their country. Having limited access to media for whatever reason blocks their ability to access information through “media of (their) choice”, as envisioned by the ICCPR. Economic and social development requires widely accessible media to enable open and plural governance with citizens able to hear from and respond to communications from Government and civil society. Access to media (and the knowledge and ideas it supplies) is fundamental to the health of a nation².

The importance of access to information has also been highlighted by the African Platform on Access to Information (APAI) declaration in its Application of Principles where it highlights Disadvantaged Communities stating that: “Governments have a particular obligation to facilitate access to information by disadvantaged minority groups and minority language speakers, as well as marginalised groups including women, children, rural people, the poor and persons with disabilities. Information should be available at no costs to these groups.

This especially applies to information that contributes to the long-term empowerment of the groups. Governments also have an obligation to ensure equitable and affordable access to information and communications technologies (ICTs) for those with special needs and for other disadvantaged persons and groups.” Although this part of the APAI declaration does not specifically mention media, the media is an important part of facilitating access to information.

Likewise, the UN’s SDG Target 16.10 seeks to: “Ensure public access to information and protect fundamental freedoms, in accordance with national legislation and international agreements.”

At a more instrumental level, Government, civil society and NGOs require media that can reach all levels of society and allows them to hear responses back from them irrespective of geographic location, education and wealth. In many areas of development like education and health, media carry messages that improve citizens’ ability to live longer and counter myths that undermine good health.

In some cases, the media persuades people to change their behavior. Campaigns on issues like malaria in Sub-Saharan Africa have highlighted the importance of widely available media and communications to encourage behaviour change. A new generation of citizen initiatives (like

1 <http://www.ohchr.org/EN/ProfessionalInterest/Pages/CCPR.aspx>

2 African countries often have clauses in their constitution that guarantee the right to access to information. For example, in Kenya: page 25/179 & 26/179 of Kenyan Constitution for media related clauses.

<https://drive.google.com/file/d/0B2mgJ0onJvmbV2JVeJlfx0tFb0E/view?usp=sharing>

Follow the Money³) rely on the power of media to change the behaviour of African politicians towards their citizens and local communities. These projects use the power of the media to hold politicians to account for promises they have made.

In civil war zones and areas with civil disturbances, the media is one route for citizens to avoid conflicts (by knowing where trouble is occurring). The high levels of the use of the BBC's Hausa service in northern Nigeria are often ascribed to it playing this kind of role effectively⁴.

The media are part of the 'public sphere' an area in social life where individuals can come together to freely discuss and identify societal problems, and through that discussion influence political action. . People's ability to contribute to such public spaces (via for example, call-ins, letters and online comments) may have important effects in the construction of national identities, in social cohesion and in enabling non-violent resolution of differences.

An important more recent part of constructing this public sphere has been the contribution of the Open Data and Open Government movement and more widely citizen crowdsourcing of information.⁵ Citizens through data and data journalism have a better understanding of the workings of their government and how they might affect what it does.

This paper is a starting point and takes the view that the absence of media or low levels of media access are worth focusing on as an indicator that there might be a shortfall in citizens' access to information.

Introduction – the Issue

Those with little or no access to media currently have so little choice that significant improvements in most cases can probably only increase the diversity and quality of media available to them. The ability of citizens to assess media critically is addressed in the recommendations in section 6.

The discussion of Africa's media deficit in this paper does not deal with two issues directly which should be explored in the future. These are (1) the diversity and quality of information supplied by the media and (2) the ability of citizens to assess critically the information they receive from the media.

When citizens have no access to media or only limited access to media their "freedom to seek, receive and impart information of all kinds" is restricted. Where this position exists, citizens are experiencing a media deficit that affects their access to knowledge. Therefore, this briefing paper sets out to do two things:

1. To outline the scale and extent of the media deficit and the general factors responsible for it in Sub-Saharan Africa.
2. To provide an overview of the types of key players who might address this issue in policy, regulatory and practical terms.

3 Jessica Musila on a Kenyan online platform for holding MPs to account: <https://www.youtube.com/watch?v=giQ3aQd6HE0> ; and Oludotun Babayemi - How Follow The Money uses traditional and online to get Govt to keep promises: <https://www.youtube.com/watch?v=RGtpzB1Py68>

4 Fragile states: the role of media and communication, James Deane, BBC Media Action, October 2013 explores these issues in greater detail, including the negative consequences of media.

5 See Nnenna Nwakanma on Africa's Data Revolution and Open Government for citizens: https://www.youtube.com/watch?v=_Meh1z2KBKU

The Briefing Paper covers five main topics:

1. A Summary of the Geographic Distribution of the Media Deficit.
2. An Outline of the Different Social Factors (Language, Income, Education and Gender).
3. The Infrastructure Factors (Lack of electricity, TV, radio, voice and data coverage).
4. Different Levels of Media Reach and their Impact on Access to Information.
5. Players who can address the Media Deficit issue.
6. Recommended Actions for Addressing the Media Deficit issue.

The paper concludes with a set of draft recommendations for discussion that might be used to address the media deficit (as defined in the Definition section below). There are two appendices: Appendix A provides a list of background reading and Appendix B summarises the outcomes and recommendations of a workshop held at the end of 2016 in Johannesburg, South Africa titled South Africa's Media Deficit and Access to Knowledge. Appendix C sets out the acknowledgements for this work.

Definition

The term media deficit is used in two ways throughout this paper: Firstly, it is used to describe where a group of people have no access to media or media devices of any kind, sometimes referred to as “media dark”. Secondly, it provides a description for those people who have relatively low access to media: for example, they only have access to one type of media or media device. Taken together, these two groups can be described as the “media poor” (in contrast to the “media rich”) and this paper seeks to identify the composition of each of these two groups. These terms represent two sets of things: firstly, lack of access to devices and media and secondly, following from that lack of access, a lack of diversity of views. The opposite of a media deficit would be a diverse media landscape of high quality available to as many people as possible, who are able to critically assess what the media produces.

Media is defined broadly and encompasses all online and offline media, including social media and SMS news and information services on mobile phones. Also for example, mobile devices are used increasingly to listen to radio using in-built FM receivers: for example, in South Africa, 40.6% of those surveyed in the RAMS survey in March 2016⁶ listened in this way. The limitations and strengths of different media for accessing information and ideas are examined in section 4 below.

⁶ The RAMS survey is a market research survey conducted by media owners in South Africa: <http://www.saarf.co.za/rams-community/2016/RAMS%20MAR%202016-Audience%20Community.pdf>

Methodology

This paper relies heavily on the existence of national surveys that address media access across a range of countries. Few countries have regular annual surveys of this kind so the paper uses survey data that has been gathered 3-4 years ago. In some tables we have used data from different years. The criteria for selecting the countries in the tables in the paper are two-fold: firstly, they represent a range of very different circumstances and secondly, there is reliable data that is sufficiently up-to-date.

Only one survey (the one on South Sudan) specifically identified those with little or no media access. So with other surveys we have used the percentage of those not listening to radio or owning a mobile phone as a proxy to hypothesize about the media deficit. The two most used forms of media delivery devices in Africa are radios and mobile and the absence of their use in survey data implies a media deficit might exist.

The Starting Point – Media Rich vs Media Poor and Access to Knowledge

The access to and distribution of media in African countries has greatly improved over the last ten years but remains very uneven. In Sub-Saharan Africa (outside of South Africa), there are still significant numbers of people who have no access to a wide range of sources of information and debate. The wider spread of the internet and online information has tended to magnify the divide between the media rich and the media poor.

Two examples taken from very different parts of the continent serve to illustrate the starting point of this report: Cote d'Ivoire and South Sudan. From a survey carried out in two key urban areas in Cote d'Ivoire, Abidjan and Bouake⁷ in early 2016, 90.5% watched television at least one day a week and 58.7% listened to the radio between 1 hour and 1 hour 59 minutes a week⁸. In other words, almost everybody reported having access to TV and more than half those interviewed had access to the radio.

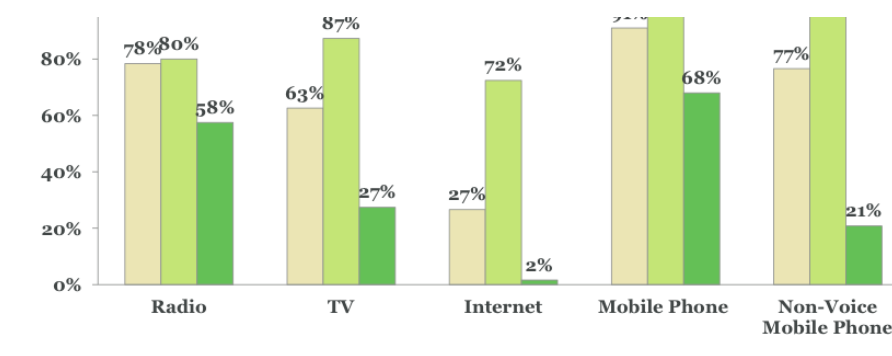
Access to the tools of the new digital world is much less evenly spread. In the Cote d'Ivoire survey, 71.8% of those over 15 years old said they had a feature phone but only 21.3% said they had a computer and only 18.4% said they had a tablet.

By contrast, only 34% of those surveyed in the province of Northern Bahr el Ghazal in South Sudan had ever listened to the radio and just 10% had watched TV. Only 1% had used the internet on a weekly basis. In other words, this province is the polar opposite of Abidjan and Bouake in terms of media access.

There are also very real differences between those who are media rich and media poor within a country as a national survey of Nigeria in 2015 illustrates. In the table below, Gallup has grouped respondents who have more media access versus less media access.

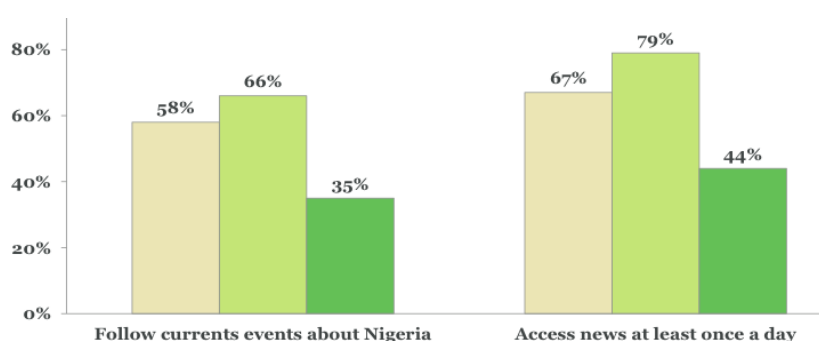
⁷ The capital and second-largest city in the country.

⁸ Mediametrie Survey carried out between 20 March and 30 May 2016.



Source: Gallop

Across every different type of media, the media poor are less likely to have access to or use different media, even widely distributed media like radio. The impact of this lower level of access on interest in news and current affairs is very clear in the chart below from the same Nigerian survey. The media poor are almost half as likely to access news at least once a day.



Source: Gallop

The key factors leading to the existence of the media poor and the media rich are well summarized in the Gallup survey on Nigeria quoted above. The table below is a slightly modified version of that table.

Factors	Media Rich	Media Poor
Education	Secondary+	None/Primary
Age	Under 35	35+
Gender	Male	Female
Geographic location	Urban	Rural
Language	Understand all/most of key languages used by media	None of key languages used by media/Understand little

These disparities are found in almost all Sub-Saharan African countries. For example, in Kenya, women are less likely than men to have access to all types of media. Even for the most popular medium – radio – only 70% of women access it weekly compared to 86% of men.⁹

There are many reasons for these disparities but this briefing paper explores the key reasons that exist below in order that different key players might focus policy and resources on closing the media deficit.

9 KDHS 2014 (page 72/603)

1. A SUMMARY OF THE GEOGRAPHIC DISTRIBUTION OF THE MEDIA DEFICIT

In geographic terms, several different types of media deficits exist. Obviously this kind of disparity is increased by civil disturbance or civil war¹⁰. The example of South Sudan shows that continuous conflict makes it difficult to roll-out even state-run media facilities and that private sector mobile operators have difficulties maintaining coverage levels¹¹.

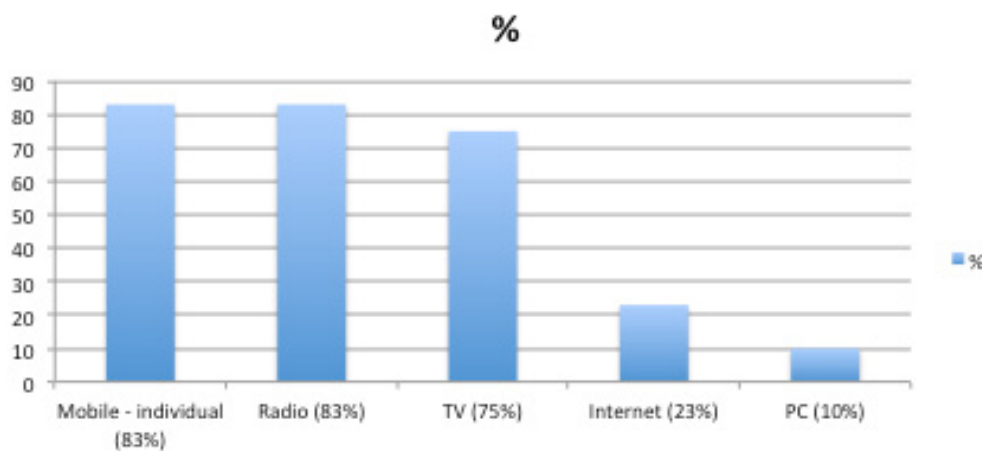
With a few exceptions, most of Africa's landlocked countries continue to be economically disadvantaged and have large populations in rural and remote areas with little or no access to basic facilities, let alone media¹².

Within countries, there are three different types of geographic media deficits. Firstly, there are informal settlements in cities where poverty means access to media may be lower: things like the cost of buying a set-top box to access television may be beyond the means of these citizens. Secondly, there are internal disparities in media access between urban and rural areas found anywhere in a country. Thirdly, there is often a divide between coastal areas and inland (often landlocked) areas.

All of these geographic disparities are almost certainly the product of other disparities (for example, education, income and gender) that are assessed in the sections that follow below. However, a geographic understanding of the media deficit is helpful because it allows policy-makers and stakeholders to think about how policy and resources might be directed at closing the media deficit in these areas.

Media use in Nigeria – one of Africa's largest economies - is summarized in the chart below: Mobile usage, radio and TV are the most widely accessed media.

Media Use in Nigeria



Source: Gallup for BBG, 2014. Internet use shown is once a week.

¹⁰ For example, Central African Republic, Democratic Republic of Congo, Somalia and South Sudan.

¹¹ Zain scales back operations to survive South Sudan crisis: <http://www.balancingact-africa.com/news/telecoms-en/38226/zain-scales-back-operations-to-survive-south-sudan-crisis>

¹² The Bottom Billion, Paul Collier, 2007

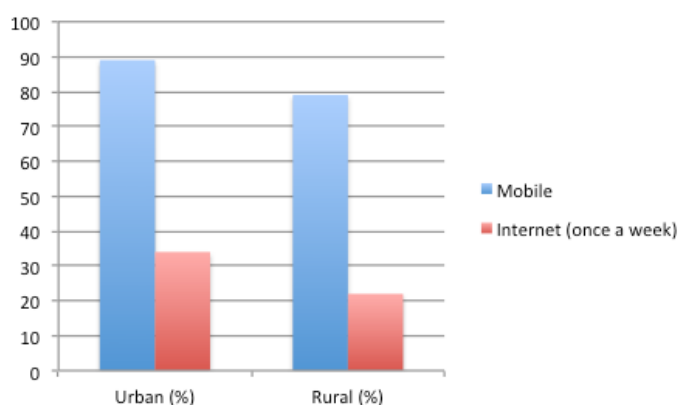
Whilst there may be those that could afford but choose not to use a mobile phone, listen to the radio or watch TV, there are: 17% of people without the use of a mobile phone; 17% of respondents not listening to the radio; and 25% not watching TV.

The implication of this proxy data¹³ is that between 17 and 25% of the population of Nigeria¹⁴ has no access to the most widely distributed forms of media. The absence of access can be taken as a rough form of proxy data for the size of the national media deficit. More specifically, the absence of access to both radio and mobile can also be read as more sturdy proxy for little or no access to media.

Media usage in South Africa shows a more developed pattern but still has the same media deficit gaps: Radio reaches 87.7% of the population, TV 85% and mobile phones 88%. Use of the internet in the last week preceding data collection was 26.9%. One could therefore infer that the South African media deficit is somewhere between 10-15% of the population. Obviously more focused research would be required to identify the exact number as with the South Sudan research discussed below.

There is a disparity between the southern and northern parts of Nigeria although the gap between the two in media terms has closed. In a survey carried out in 2014 by Balancing Act for the New Ventures Fund¹⁵ access to mobile, radio and internet was broadly the same as the national figures above or slightly higher. But access to TV was only 62% (against 75% nationally) and 6% for PCs and laptops (against 10% nationally).

There are also clear disparities between urban and rural use of different media in Nigeria. Two of them – mobile and internet– will serve to illustrate the point. For example, there is a 10% difference between urban and rural mobile phone ownership difference and almost the same percentage difference between once a week use of the internet in urban and rural areas.



Source: Gallup

Somalis in urban areas are more likely to have a television in their household by a margin of 52.1% to 23.2% in rural areas, as well as a mobile phone (70.8% vs. 63.3%), computer (26.8% vs. 8.9%), and internet access (26.7% vs. 16.0%). In rural areas, where internet and television access are

¹³ Data used to study a situation, phenomenon or condition for which no direct information - such as instrumental measurements - is available. <http://www.eqavet.eu/qc/gns/glossary/p/proxy-data.aspx>

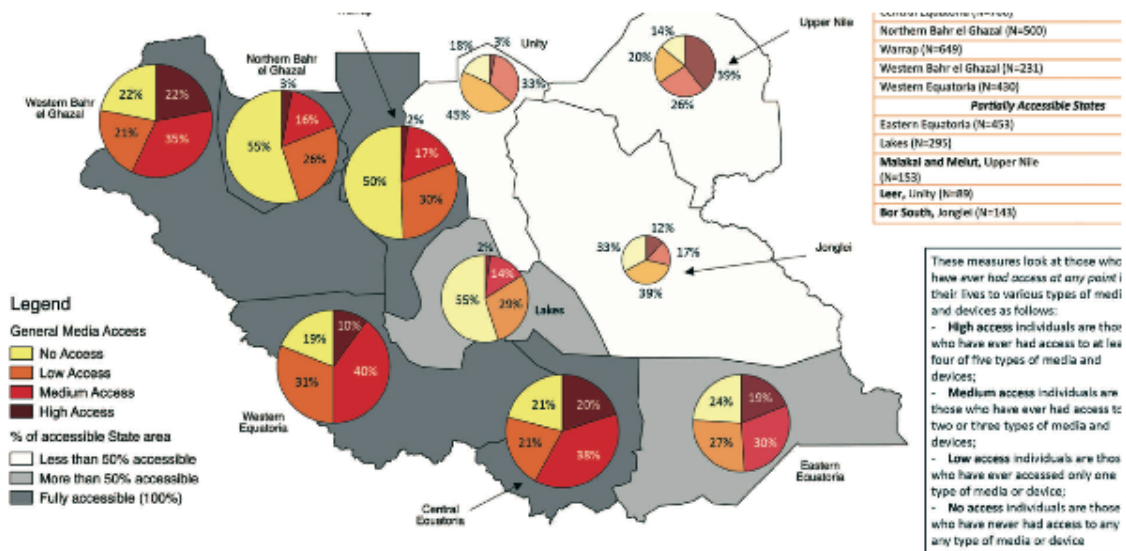
¹⁴ Nigeria's population is 181,562,056, according to a July 2015 estimate of the CIA Factbook,

¹⁵ See full reference for study in Appendix A but a summary is provided on this link: <https://www.slideshare.net/newsbunny/media-internet-and-social-media-landscape-in-subsaharan-africa>

scarcer and the population is more heavily reliant on radio for getting news and keeping up with events outside of their local community, radio ownership is about as common as it is in urban households (81.1% vs. 84.5%).

These kinds of urban vs. rural disparities exist in all African countries where it has been measured and so one could explore whether the same results would be found in those countries for which there is no data. Put simply, rural citizens are in terms of access to media are second-class citizens who also have less access to the types of platforms that allow them to express their opinions to their governments and fellow citizens.

At the less developed end of the spectrum is South Sudan where a detailed survey was carried out in the accessible areas of the country in 2015. It provides a detailed breakdown of areas that have no or little media access. The yellow and orange segments represent respectively no or low access to media.



Source: http://media.wix.com/ugd/67feb2_f16dc9b27e524d1da300008e5001fac9.pdf

Roughly one in three (34%) respondents have never had access to radio, television, newspapers, internet, or mobile phones. 51% had accessed radio and only 24% had ever seen TV. Only 9% had ever used the internet with a weekly use of only 7% of the population in those areas.

The research revealed vast disparities among different provinces in the areas where it was considered safe enough to conduct survey work. Taking no media access and low media access (typically radio only) together, they range from 42% of those surveyed in Western Bahr el Ghazal to 84% in the Lakes province.

So where do those with no access to media turn to for information? Individuals who have no access to media say they trust religious leaders (25%) or face-to-face conversations with friends or family (21%) the most as sources of information, while individuals with high access to media trust the radio (69%) most against all other forms of media.

The table below shows access to the four main media platforms in a selection of countries in Africa: radio, mobile, TV and internet. The column on the far right shows the percentage of the population who do not seem to have access to either radio or mobile or both. In some countries, the percentages are small but the numbers quite large and in others both the percentages and the numbers are large:

Country/Media	Radio	Mobile	TV	Internet	Implied Media Deficit
Senegal	87%	90%	75%	17%	10-13%
South Africa	87.7%	88%	85%	26.9%	11-15%
Ghana	84%	88%	76%	21%	12-24%
Nigeria	83%	83%	75%	23%	17-25%
Tanzania	82%	91%	52%	17%	9-48%
South Sudan	51%	44%	24%	9%	49-81%
Somalia	83.9%	72.4%	n/a	24.9%	16-28%
Uganda	83.4%	62.8%	14.8%	6.5%	15-37%

Sources: Ghana, Balancing Act, 2013; Nigeria, Gallup, 2014; Senegal, Balancing Act, 2013; South Africa, various as cited in footnotes; Tanzania, Balancing Act, 2013. Questions are sometimes asked in a slightly different but broadly similar ways; Somalia, Gallup, 2013; radio figure is access news; Internet figure is weekly use; Access and Usage of Communication Services across Uganda, Uganda Communications Commission, 2014, Mobile is used not owned; Use of Internet in last three months¹⁶.

¹⁶ Pew Research Centre has a wider set of internet use figures and also provides global comparisons on the link below: Ethiopia (8%); Burkina Faso (18%); Tanzania (21%); and Senegal (31%): <http://www.pewglobal.org/2016/02/22/smartphone-ownership-and-internet-usage-continues-to-climb-in-emerging-economies/>

2. AN OUTLINE OF DIFFERENT SOCIAL FACTORS (LANGUAGE, INCOME, EDUCATION AND GENDER)

2.1 Literacy

Literacy is a key factor in terms of the media deficit and access to knowledge in Africa. Literacy might be described in three different ways: the ability to read; functional literacy and less precise terms like tech and media literacy. In terms of reading for example, the UK measures literacy by those having the at least the same ability to read as a five-year-old. In Kenya, the Kenyan Demographic and Health Survey (KDHS) of 2014 defined literacy as the respondents' ability to read all or part of a simple sentence.¹⁷

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Functional literacy refers to the ability to do different tasks like read a menu or a timetable that involve both reading and other understandings. For example, research by the Joseph Rowntree Foundation in the UK was based on adults' capacity to read a bus timetable and possession of reading, writing and numeracy skills deemed necessary to carry out a job.

Although this is not an African example, it illustrates that the ability to read affects wider functional literacy, an issue that is important in understanding what Africans might or might not be able to do in media terms.

Tech literacy is much looser but is about using tech tools "to access, manage, integrate, evaluate, create and communicate information"¹⁸. Media literacy is used in a similar way and again is about the ability to access, use and critically assess different forms of media.

The table below shows the percentage of the population unable to read or write. The right hand column demonstrates that female illiteracy is nearly always significantly higher except in a small number of countries. Those unable to read will not be able to make use of news and information either online or in print form or be able to read SMS news and information services. However, they will be able to make use of both radio and TV.

¹⁷ KDHS 2014 (67/603) <https://drive.google.com/file/d/0B2mgJ0onJvmBekwySDBULXVwZDA/view?usp=sharing>

¹⁸ Wang, Victor C. X., 2010, p. 36

Illiteracy for selected countries

Country	All	Female
Senegal	44%	66%
South Africa	16%	17%
Ghana	23%	29%
Nigeria	40%	50%
Uganda	26%	33%
Somalia	n/a	n/a
Tanzania	20%	24%
South Sudan	68%	75%

Source: UNESCO

In Senegal and Mali, separate surveys show that even with somewhat higher literacy rates in French, the literacy rates in locally used African languages were only in the single digits. Some Africans may well be literate (and indeed erudite) in a European language, but not literate or less comfortable in print with their first language.¹⁹ Literacy and language also affect access to online media. A great deal of online content is in former colonial languages. For example, in East Africa, there are relatively high levels of literacy in Swahili, particularly in Tanzania, but there is relatively little online material in Swahili.

2.2 Language

As the points above show, layered over the top of the issue of literacy is the complexity of languages. Language and a person's ability to use a language affect their ability to understand media. Almost all African countries have numerous spoken languages. Many of these languages are not used widely in written form. Media is often in the former colonial language but this is not always spoken by a majority of people in a given country. For example, in Rwanda only a relatively small proportion speak either French or English but nearly all speak Kinyarwanda. The English or French spoken is often very different from other forms. In Nigeria, it is estimated that 16% of the population speak pidgin that is a mixture of different words drawn from many sources often learnt at an early age. There are radio stations that broadcast to cater for those speaking pidgin.

Where one speaks a non-colonial language, it may not be the speaker's first language. For example, in Senegal, Wolof is spoken by 80% of the population but for half of those who speak Wolof it is a second language. In South Sudan there is no single language spoken by more than a quarter of the population.

In terms of media access, there are an increasing number of radio and TV channels in African languages. However, there are still language communities that are too small to make much commercial sense for private operators. Although some countries (for example, Niger and Mali) they are well-served by community broadcasters. The government broadcasters deal with some of the smaller language groups but are not able to deal with all of them.

¹⁹ My thanks to Donald Z. Osborn for this observation.

Complexities of Language

Country	English	French	Main Language 1	Main language 2	Languages total
Kenya	19%	N/A	Swahili: 79%	Kikuyu:18%	68
Rwanda	5%	6%	Kinyarwanda: 95%		
Nigeria	53%	N/A	Pidgin: 16%	4 main languages: Hausa ²⁰ , Yoruba, Igbo, Fulani	500
Ghana	67% (incl. Pidgin)	N/A	Kwa: 60%	Akan: 40%	70+
Tanzania	10%	N/A	Swahili: 10% as first language;	Swahili: 90% as second language	100+
South Africa	31%	N/A	Zulu (23%); Xhosa (16%) and Afrikaans (13%)	11 main languages	30
Senegal	N/A	10% fluent; 21% partially; only 1-2% women	Wolof: 40% as first language; 80% incl. second language speakers		36
South Sudan	<5%	N/A	Amharic: 22%	Bari: 18%; Dinka: 18%	60+
Cameroon	25%	58%	Regional pattern of first languages	English pidgin and Français	230+
Zimbabwe	42%	N/A	Shona: Est. 70% as first language	Ndebele: Est.20% as first language. No census data on language	16 official languages
Uganda	9%	N/A	Three main families — Bantu, Nilotic, and Central Sudanic	Swahili but different from Kenyan and Tanzanian Swahili	40+
Togo	N/A	30-35%	Ewé in the south from Lomé to Blitta	Kotokoli from Blitta to Dapaong in the north	39+
Mozambique	Portuguese: 50%; 81% in urban & 36% in rural. 11% as first language	N/A	5 other widely spoken languages by region		43

Sources: Kenya: Crystal (2003), Chara.virtuallave.net/afrilang1.html; 2009 Census; Rwanda: Report, 2014, *La Francophonie*; Nigeria: Pidgin, *Ethnologue* (2009), Wikipedia; Ghana: 2010 Ghana Census; Tanzania: Wikipedia; South Africa: *Native Speakers*, 2011 Census; Senegal: Wikipedia; South Sudan: *Internews study*, 2015 cited elsewhere; Cameroon: 2005 Census; Zimbabwe: Wikipedia; Uganda: Wikipedia; Togo: Wikipedia; Mozambique: 2007 Census, *INE Mozambique*.

20 There are different estimates for each of these language groups.

2.3 Education

Those with lower education levels are less likely to access the media. The data of Somalia illustrates a country that has been torn by war since at least 1988 and whose citizens have had poorer access to education as a result, illustrates this. A Gallup survey in Somalia²¹ found that those with secondary education (76.8%) or at least some college education (78.8%) accessed the media at least once a day compared to lower percentages of those with less education. Those with only a Koranic education are among the least likely to access the internet, at 10.3%.

2.4 Gender

There are few pieces of publicly available media research focused solely on women's use of media although one has looked at the under-representation of women in the media and media stories²². However, as is clear from more general media surveys, poor women are less likely to have as much media access as their male counterparts.

There are two studies that look in detail at women's access to and use of mobile phones: among their results from a range of countries globally are several African countries. Since along with radio, a mobile phone is the most widely distributed media device, these are extremely significant.²³

In a GSMA study, the percentages of people who did not own a mobile and had never had the opportunity to use one were: Niger (56%); DRC (49%); and Kenya (40%). The five top barriers preventing women using mobile phones across all countries in the study were: cost, network quality and coverage, security and harassment, operator/agent mistrust and technical literacy and confidence.

The harassment feared by women is from strangers either by them calling or from spam texts from them. In some countries both male and female respondents reported men ringing random numbers in the hope of connecting with a woman.

The lack of trust of operators and agents also is a key barrier: female respondents in some countries reported feeling uncomfortable with male sales agents.

With increasing use of social media to access media information online, the GSMA study throws some interesting light on gender disparity even at the wealthier end of the spectrum. Globally, social media often appeals more to women than men but even in this area, use by men in African countries is likely to exceed that of women. Country examples illustrate the disparity among smartphone and feature phone²⁴ users: DRC (30% women vs 44% men) and Niger (33% women vs 44% men).

The World Wide Web Foundation's study Women's Rights Online²⁵ (based on urban research in poor communities) found that in terms of internet access there was a disparity between male

21 Media Use in Somalia 2013, Gallup for BBG, 2013

22 Liberia: Survey Raises Concern Over Women's Access to Media, Robert Dixon for Liberia News Agency: <http://allafrica.com/stories/201504010953.html>

23 See Appendix A, GSMA and the World Wide Web Foundation.

24 Smartphone: a mobile phone that performs many of the functions of a computer, typically having a touchscreen interface, Internet access, and an operating system capable of running downloaded apps. Feature phone: a mobile phone that incorporates features such as the ability to access the Internet and store and play music but lacks the advanced functionality of a smartphone. Basic phone: a mobile phone that has voice, SMS and USSD functionality, and sometimes a torch.

25 <https://webfoundation.org/research/womens-rights-online-2015/>

and female use of the internet. However, the studies identified age and education as key factors:” The most important socio-economic drivers of the gender gap in ICT access are education and age. Making allowances for income as a factor, women who have some secondary education or have completed secondary school are six times more likely to be online than women with primary school education or less. Cities with the highest gender gaps in education level such as Nairobi (Kenya), Kampala (Uganda), Maputo (Mozambique), and Jakarta (Indonesia) were also the ones where the highest gender gaps in internet access were reported”.²⁶

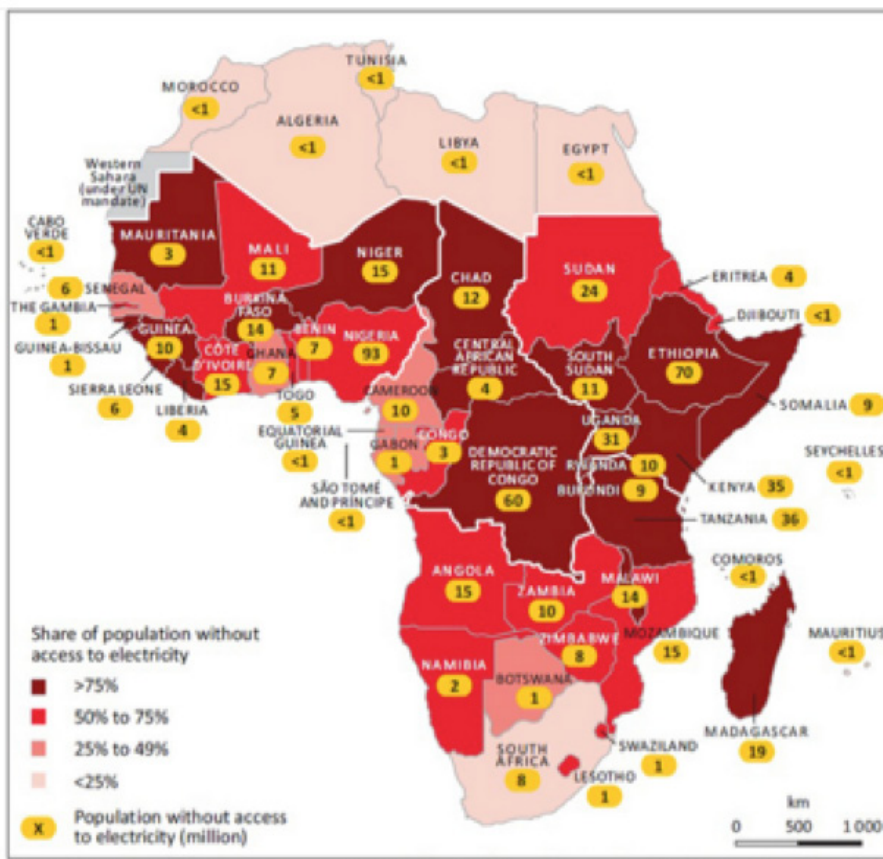
Key barriers to internet use identified included know how cost, a lack of time, relevance of content and access to infrastructure and internet-enabled devices. But even when access to media is assured, content may not be relevant to the people being addressed. For example, in March 2015 a survey was conducted by the Liberia Women’s Media Action Committee on women’s access to the media in that nation. Findings from the survey indicated that, although people claim to receive news and information on women issues, the frequency with which such news is received is very low. The study revealed that women remain largely absent from news stories. Most stories were found to be about men, and when women are the focus of a story, it is usually a negative portrayal, often about rape or some form of gender-based violence.

26 ebd: p. 4

3. THE INFRASTRUCTURE FACTORS (LACK OF ELECTRICITY, TV, RADIO, VOICE AND DATA COVERAGE)

Access to infrastructure is cited as a key barrier to both mobile and internet in the gender based studies quoted in the previous section.

There is a range of infrastructure factors that affect access to media. One of the hardest to overcome has been the absence of electricity. This absence makes recharge electronic devices of any kind but particularly TVs and recharge mobile phones. Most devices can be run off of larger battery power or micro grids but these are not yet widely available. The map below shows both the percentage without electricity and the numbers in millions.



In Kenya, one ray of light in this gloom has been the launch of a first solar-powered digital flat screen TV by M-KOPA aimed squarely at the 69% who do not yet have television²⁷. M-KOPA started by selling its customers solar lamps paid for by loans.

Once the existing customers for its solar lamps have paid off their loans they can have a new payment plan to purchase a solar-powered TV for KES50 (US48 cents a day). According to Jesse Moore, CEO at M-KOPA, "What's remarkable about the M-KOPA + TV is it enables customers to turn the same KES 50 per day that they used to burn on kerosene into a solar-powered 16 inch TV. We are literally turning dirty fossil fuels into a renewable, digital, modern home."

27 Kenya Audience Research Foundation 2015

“Owning a TV is life-changing for our off-grid customers. Many of them have traditionally had to pay to watch in a café or bar, or missed out on news and current events because they could not afford to be connected to information. We are now going beyond the grid to offer TV to homes all over Kenya. It’s great for the family to be able to watch together in the comfort and safety of their home,” says Moore.

Whilst enormous progress has been made in providing mobile phone coverage in African countries, there still remain large numbers of people who do not have access to mobile voice and data. Even those areas that are well covered, it is sometimes the case that the coverage follows the road and does not connect village households. But often even in those areas where there is coverage, they may not have access to data or the quality of data access is poor.²⁸

With rural electrification in some countries and the renewed focus on TV transmission coverage because of the transition to digital, some progress has been made in extending coverage areas but there are many people who have not yet had access to television.

Estimate percentages that do not have access to Mobile, Radio and TV

Country	Mobile*	Radio	TV
Kenya	10%	26%	40%**
Uganda	36%	39%	85%
Ghana	12%	16%	24%
Nigeria	17%	17%	25%
Senegal	10%	13%	25%
Tanzania	9%	18%	48%

* Overall mobile percentages are higher than is actually the case as mobile subscriber numbers double count people with more than one phone.

** 60% DTT population coverage, CAK, Kenya

Sources: See Table at the end of section 1.

The absence of infrastructure for electricity supply and radio and TV transmission means that people living outside those coverage areas receive less media and as a result, less information and ideas.

²⁸ Falling into the cracks in data coverage – how a village close to the fibre and 45 minutes from Nairobi can't get data access: <http://www.balancingact-africa.com/news/issue/telecoms-en/867>

4. DIFFERENT LEVELS OF MEDIA REACH AND THEIR IMPACT ON ACCESS TO INFORMATION

Different media perform different functions. For example, if one wanted to explain how to assemble a piece of agricultural equipment or a water pump, she might be able to do it using radio but the absence of visual information would make it considerably harder. Also the radio listener may hear something but cannot easily go back and check on what was said.

Also whilst SMS on basic phones can provide headlines or bite-size chunks of information, it is much less useful when a larger amount of information needs to be conveyed. A small screen on a basic mobile phone will not be the most ideal medium for a video clip showing how to assemble a piece of machinery.

Data applications like WhatsApp and WeChat on smartphones and feature phones can provide voice and video calling, the equivalent of radio broadcasting. Platforms like these that are likely to pave the future of content distribution.

Although radio and SMS are probably the two most common means of communication in areas of weak media access, they may fall short of offering the kind of appropriate media that more sophisticated users many may take for granted. These limitations further disadvantage those who rely on radio and SMS communications.

The lack of media access is most acute in terms of two things: firstly, some form of access to moving images and secondly, access to the means of interacting with others about media and the issues raised through social media. The media poor have few means of acquiring information and knowledge and of making their opinions heard either to their fellow citizens or to their governments.

Newspapers as a media remain important for the content they generate in other media, whether online or for broadcasters. Radio and TV stations frequently use print news reporting and often translate out of English into other languages. However, this role has become vulnerable as consumers transition to online access, advertising revenues decline and circulation lessens. In fact, presently,, only a small number of people rely on newspapers primarily for information. A national survey carried out by the National Commission for Civic Education (NCCE)²⁹ in Ghana found that only 1.5% of all Ghanaians relied primarily on newspapers for certain types of information. Comparatively, 62.9% of those interviewed turned to radio, 25% to TV and 6.4% to the internet.

Accordingly, a policy debate needs to take place regarding how to close the media deficit both for the poor in urban areas and for rural dwellers. Resolution necessarily involves bringing a number of different perspectives to address this single problem: government policy and regulation to address gaps in infrastructure and the cost of communications; education to address both overall literacy and media literacy; and incentives for public, private and community media to fill these gaps with relevant content.

29 Accessing the Effectiveness of the Media in Ghana's Democracy, NCCE

5. PLAYERS WHO CAN ADDRESS THE MEDIA DEFICIT ISSUE

Responsibility for providing infrastructure in Africa falls on three sets of actors: the private sector, the government and international donors.

The private sector is interested in providing services for those who can afford them. To provide these services, companies will often build telecommunications network infrastructure. It uses the term “addressable” in the market to describe those who fall into the category of those who can afford services. However, the private sector also has an interest in the long-term growth of the market so has been involved in efforts to expand the addressable market. Mobile operators have spent money on a range of projects designed to expand coverage to economically marginal markets. The mobile operators’ trade association the GSMA has created an initiative to work with operators to close the gender gap.

There is no media equivalent of universal access and whilst some media owners have pioneered wider access in their countries, the majority of media owners have understandably tended to remain largely in urban areas.

The advertising markets that support newspapers, radio and TV are not often well developed, reflecting the weakness of the wider economy. Advertisers for brands mainly bought by the urban middle classes can perhaps afford to ignore the wider population. But brand advertisers for goods bought universally (for example food, soap and beer) will have an interest in seeing the national media reach expanded.

Government and donors have tended to focus on providing hard infrastructure. Once the difficult tasks of encouraging national and international fibre infrastructure was largely completed, there has not been a similar focus on the more challenging task of getting infrastructure to rural areas.

Although the digital transition in broadcasting has in some countries led to creation of wider broadcast coverage areas, this has not been a defined developmental objective. While telecoms regulators often set themselves coverage targets for voice and internet, an equivalent for media regulators and radio and TV coverage is absent³⁰.

There is little or no interchange between telecoms and media regulators about the cost effectiveness of delivering audio-visual content to schools, community viewing spaces and health clinics. Those with limited economic opportunities receive little or no information about changing their economic circumstances.

Civil society organisations and NGOs have rightly focused on media freedom and a range of related issues but have devoted much less time to thinking about who is able to access basic news and the pattern of inequalities that exist in media access in all African countries.

³⁰ Sometimes the functions are contained within a single regulator but even these, with certain exceptions, do not focus on media coverage.

While it would be possible to imagine circumstances in which a government or regulator creates a policy to address the media deficit, financial incentives would need to be provided to both infrastructure builders and media owners to find ways of delivering media content to disadvantaged areas. In addition, civil society organisations – particularly those concerned with issue based campaigning – might begin to develop an understanding and awareness of how to use media and social media to articulate communities' views and aspirations to government.

6. RECOMMENDATIONS

The recommendations below are grouped into general overarching recommendations at the beginning and under the four main headings: general, social factors, infrastructure factors and content. In most instances, recommendations have been matched to existing African examples of good practice. It is important that there are not just the right policies but also funding and programmes to implement the policies. The recommendations are also derived from the discussions and findings from the workshop entitled South Africa's Media Deficit and Access to Knowledge, which took place in Johannesburg on 30 November and 1 December 2016.

6.1 General

6.1.1 National Strategy: The need to address a country's media deficit should be built into its national development strategy as part of a way of giving people information that empowers them.

Understanding any policy gap should begin with an assessment as to whether a media deficit indeed exists and, if so, its nature and scope. Mapping the existent research and information with a goal of highlighting the missing details, considering private sector data and a legal analysis of information, expression and media rights laws would provide a benchmark.

For example, in Kenya the social pillar of its Kenya Vision 2030 highlights the need for improved livelihoods for all vulnerable groups (including women, children, rural people, the poor and persons with disabilities). One strategy recommended is through making sure that vulnerabilities are minimized by giving these people information. Under the political pillar, the vision highlights the need of transparency and accountability (by institutions) and encourages public access to information and data to increase citizen oversight³¹.

Other issues that might be addressed under this heading are the cost of data access in comparison with the quality and quantity of information available. Public pressure, through social media and campaigns like #datamustfall seek to reduce high data costs in South Africa.

Further, the region's media tend to be dominated by state broadcasters, who are able to exercise not only a monopoly on accessible media but also on information. It is thus essential that efforts that seek to work closely to hold these entities accountable are also supported to help combat the media deficit. In addition, efforts to open media to both the private sector and the community can also serve as a counterbalance to these state monopolies on access.

31 Page 18/230: Vision 2030 Kenya: <https://drive.google.com/file/d/0B2mgJ0onJmBVFFHRVZvNIhfbGM/view?usp=sharing>

Another tendency among some governments in Africa is to adopt a Chinese model for media regulation needs to be challenged by CSOs and the private media.

Subjects including Facebook community guidelines, music regulations, licensing of radio, data sharing/open data policies, universal access to internet, human rights considerations in freedom of expression are also raised as potential policies that would reduce the media deficit. Access to the policies themselves can also serve as a barrier for advocacy and policy building efforts.

6.1.2 Linking infrastructure initiatives, information provision, media access and citizen engagement: Any initiative aimed at increasing access through providing infrastructure needs to have a parallel set of linked initiatives that address how citizens (particularly those in rural areas) can then obtain relevant information in a language they understand.

For example, Mauritania's universal access agency³² brings together the provision of water, electricity and telecoms to remote communities. There is no reason in a period of increased convergence why telecoms regulators should not include information provision as one of the responsibilities of their universal service fund. Media regulators might also advocate for wider media provisions in this way. Civil society organisations should seek together with the key players identified in section 5 above to argue for this kind of linkage.

6.2 Research and Coordination

6.2.1 Coordinating among those involved in addressing the media deficit: One of the primary difficulties in addressing the media deficit is the lack of knowledge of each of the different players and their specific activities. In South Africa, sector specialists attempted to delineate the entities whose work impacts or could impact the media deficit. This outline was very complex with many different interconnecting parts.

It is key that institutions align activities so as to not waste resources, duplicate efforts and work against each other unintentionally. Accordingly, an initial step for addressing the media deficit in a given country may require analysis of who is involved and how their activities interrelate. Subsequently, forming an alliance for information sharing about current events, notable changes and plans would be a low-cost tool that could link members to funding opportunities, improved programme design and the latest political activities.

Additionally, fora for sharing and evaluating innovative models for delivering content and access among the industry could yield new inventions.

6.2.2 Defining media deficit: In order to address the media deficit, a definition of the concept should be tailored for the jurisdiction in question. Consideration should be given to print form media and digital media, distinguishing among the types of media, access to content and the content production, the nature and independence of the information available (e.g. government content, religious content) and separating the tiers of broadcasting.

6.2.3 Threshold questions: In line with section 6.2.1 (above), certain threshold policy and factual questions may best be addressed at the outset. While funding for independent

32 Agence pour la promotion de l'accès universel aux Services: <http://www.economie.gov.mr/spip.php?article135>

research in this space has been limited, coordinated efforts through an information sharing mechanism as contemplated in 6.2.1 (above) could lower expenditures. Threshold research could include:

- a. Determining the current legal and policy frameworks that facilitate media deficits.
- b. Assessing which laws and policies need to be in place to enhance access to information.
- c. Analysing the cost of expanding infrastructure access to a wider number of people.
- d. Assessing how one can guarantee that media devices are made accessible to everyone.
- e. Conducting survey to find out what people understand about access to information.
- f. Assessing the supply and demand ratio.
- g. Understanding security concerns and minimum standards.
- h. Mapping international efforts on media deficits, learning from such activities and aligning with those objectives.
- i. Exploring business models that bring together cost and quality of services.
- j. Comparing cost of communications, data services and pricing models.

6.3 Social Factors

6.3.1 Linking improving literacy to wider mobile phone use: Efforts to widen use of mobile phones – particularly in rural areas for young girls and women – should be linked to initiatives that improve basic literacy.

There is some evidence to suggest that the use of mobile phones in literacy work can improve results alongside other efforts³³. Most of the work in this area is now over five years old but should be revisited³⁴. Literacy teaching could include helping learners understand expressions and words used in basic media.

6.3.2 Greater emphasis on a tiered approach to languages used: Consideration needs to be given – particularly for government and public media – to what languages would be most appropriate for different technologies and channels of communication.

For example, in Ebola virus information campaigns in Nigeria and Senegal, different languages³⁵ were used across a variety of media, with local languages being used on radio and English and French being used at a national level. The consideration of the most effective language that was so effective in an emergency needs to be applied more generally on a daily basis to media, particularly community and government media.

6.3.3 Media and Information Literacy: Nationally schools need to look at the best ways of ensuring that students have critical competencies in terms of finding and consuming information. Also given the occasionally negative consequences of unverified information on social media they might also benefit from understanding ethical and journalistic competencies in terms of producing content themselves. Tomorrow's citizen journalists will need a good foundation for engagement. There is a considerable body of global curriculum work on media education that might be repurposed for the African context.

33 Mobile phones improve adult literacy, Christopher Ksoll, Royal Economic Society, 2011: www.res.org.uk/SpringboardWebApp/userfiles/res/file/Conference/2011/.../mobile.doc

34 A good example is Tostan: <http://www.tostan.org/program/mobile-phone-literacy-and-development-module>

35 <http://niamey.blogspot.co.ke/2014/10/languages-communication-in-nigerias.html>

- 6.3.4 Focusing on gender: The current evidence establishes that women are disadvantaged in terms of access to media and the means for obtaining it. However, as elsewhere, there is a shortage of more detailed action research is necessary to explore how this gender inequality might most effectively be addressed.**

International public broadcasters (who are publicly funded) should make available their sometimes quite extensive research datasets to help with this process. For example, the BBC has talked about setting up a new research data portal, making use of its research data sets³⁶. These kinds of surveys should also focus on identifying areas where there is little or no media access.

6.4 Infrastructure

- 6.4.1 Expanding the reach of television: National governments should use the opportunity of the digital transition in broadcasting to create plans to expand the reach of their TV transmission infrastructure. A greater emphasis should be placed on universal access to broadcast media in Government and regulatory policy terms. Whatever shortcomings the digital transition process in South Africa has had, there has been an exemplary roll-out of digital broadcasting transmission infrastructure. Likewise in Kenya, where the digital transmission roll-out has coincided with an effective rural electrification scheme. Also Kenya has seen the beginning of the roll-out of solar-powered TVs for rural areas by more than one organization. Satellite may also be a key component in ensuring access to broadcast media in remote areas.**

Public and community broadcasting (for example in Niger and Mali) have a strong contribution to make, particularly in harder to reach areas. Consideration should be given to delivering media via broadband internet with public viewing areas and over mobile internet. The licensing of broadcast stations needs to facilitate the highest level of access to national audiences rather than restrict access to audiences. Public broadcasting needs competition from its private sector equivalent particularly in television.

- 6.4.2 Continuing to lower the cost of access: The total cost of access (device, cost of data) remains an issue in all African countries and there is considerable evidence (some of which I have cited) from bodies like Research ICT Africa and the Web Foundation supporting this. The Alliance for Affordable Internet's 2017 Affordability Report³⁷ identifies how universal service funds are often not being spent and provides a good example of a free Wi-Fi scheme in Botswana.**

But from a civil society perspective, the #datamustfall campaign in South Africa provides some evidence that there is now sufficient strength of feeling about this issue to suggest that campaigns of this kind will touch a chord and might be successful. There are many examples of initiatives by mobile operators who have introduced cheap smartphone handsets. Governments and regulators need to have strategies that will reduce the cost of data. One priority should be that data be open and free. Free Wi-Fi in shopping centres, government buildings, schools and similar public spaces one direct way to conquer the media deficit.

- 6.4.3 Continuing to roll-out voice and internet to the unconnected: There are still too many Africans who have no access to voice and data. The universal service funds collected must be used to close this gap. There are a number of different technologies and**

³⁶ <http://www.bbc.co.uk/mediaaction/research-and-insight/research/faqs#faqitem-3-8>

³⁷ <http://a4ai.org/affordability-report/>

business models that can be deployed in areas where it is hard to make a business case³⁸.

Telecommunications companies should be encouraged to share their information on data access, showing those areas where signals are and are not available.

6.4.4 Innovation: Some of the most exciting progress against a media deficit comes from the private and non-profit sectors focused on innovation in technology and access. Entrepreneurs are eager to access new markets and the policy environment, together with the finance and business frameworks, can determine whether these actors are able to succeed. At the same time we are seeing the emergence of community wireless networks, where communities take ownership and control of access to the internet. While still a fledgling sector evidence of interest and growth can be seen in the running of the Second Summit on Community Networks in Africa.

For example, in South Africa, Shika Moto provides a community Wi-Fi mesh network offering free Internet-like services (access to information and communications), as well as data sharing, digital literacy, skills development and community ownership of system. The three communities where Shika Moto is being piloted are using it in different ways. So, for example, one community wanted a virtual database and network on early childhood development (ECD), another community is using it to monitor and analyse community media and for feedback mechanisms.

As technology makes it possible to share information in innumerable ways, the regulatory framework must be flexible and dynamic (allowing the piloting of new, low-cost technologies) in order for innovation to be encouraged.

6.5 Content

6.5.1 Encourage locally created media content: Donors, civil society and regulators need to put in place programmes that will encourage local, citizen-created content (both journalistic and otherwise) for rural areas with a mixture of cheap recording equipment and internet connections.

There are already parallel schemes that encourage creative work and content from which lessons might be learnt. The Kenyan Government initiative that is creating music studios in the country's counties and the work of the Heva Fund are two examples.³⁹

6.5.2 Help all media to provide for uncovered or under-covered audiences: Private and public media should be encouraged with one-off subsidy schemes to expand the reach of their existing audiences using digital channels.

6.5.3 Devising new content delivery models: Start-ups and civil society organisations should be encouraged to deliver media to rural areas using new communications business models, especially through mobile and internet.

³⁸ See organisations like Vanu, poa! Internet and Mawingu among others.

³⁹ <http://www.hevafund.com/#grow>

Appendices

Appendix A – Background reading and resources

Connected Women – 2015 Bridging the gender gap: Mobile access and usage in low- and middle-income countries, GSMA

Khatun, S., Debeljak, K. and Power, G. (2011) Citizen Access to Information Emerging trends from the developing world. *Intermedia*. March. Volume 39, Issue 1. p. 18-23.

Lee, P, Jideofor, N, Reed Petty, K, People-Powered Media Innovation in West Africa - Accelerating development & good governance in the new media landscape, Reboot for Omidyar, 2016

Mytton, G., Diem P., and Hein Van Dam P. (2015) *Media Audience Research: A Guide for Professionals*, Sage

Power, G., Khatun, S., Debeljak, K. (2012) "Citizen Access to Information" Capturing the Evidence across Developing Countries. *Handbook of Global Media Research*. Wiley Blackwell – Ingrid Volkmer (ed.)

The Sub-Saharan African Media Landscape – Then, Now and in the Future, Balancing Act for the New Venture Fund, 2014: <http://www.balancingact-africa.com/reports/telecoms-internet/the-sub-saharan-african-media-landscape--then-now-and-in-the-future-august-2014>

Wang, Victor C. X., *Encyclopedia of Information Communication Technologies and Adult Education Integration*, 2010

Women's Rights Online Translating Access into Empowerment, World Wide Web Foundation, 2015

Appendix B – Sample Workshop Outcomes and Recommendations – South Africa's Media Deficit and Access to Knowledge, Johannesburg, 30 November & 1 December 2016

I. RESEARCH OPPORTUNITIES	
Source	Opportunity
Discussion on Media Deficit Briefing Note	It would be useful to have a closer focus on South Africa. Research should be conducted on the media deficit more explicitly, for example, to (i) explain where the media deficit is, (ii) establish formal media deficit category definitions and (iii) distinguish between access to (a) local and national news, (b) formal or traditional media and (c) social media.

Discussion on Media Deficit Briefing Note	Media deficit must be looked at in terms of access to content AND content production, as well as access to technologies and infrastructure. So, for example, state-owned media (radio and TV) or media full of evangelical content only would also represent a media deficit.
Group Discussions and Summary of Discussions from Day 1	<p>A starting point for research regarding the policy gap might be to have definitions to clarify what we need and check whether there really is a deficit, and the nature and scope of the deficit.</p> <p>We need to pay attention to community perspectives on what media people need and want; and underpin this with research. For example, a Research ICT Africa's study suggests that 35% of women in South Africa say they don't go online because the content is not relevant.</p> <p>Research is required to create better definitions, to test assumptions regarding who is media poor and what such people want.</p>
Group Discussions on Research and Policy and Various Sectoral Presentations	<p>The following research would be beneficial:</p> <ol style="list-style-type: none"> 1. Map existing research on media access and information and highlight gaps. We need to look at research available in the private sector and elsewhere.. 2. Cost of communications / data services / pricing models. Are consumers benefiting from international lowering of costs? In terms of data: why should it cost more here than in Nigeria? We are beginning to see new entry level smart phones being used as feature phones only (SMS, camera, etc.), and this is likely to continue until data costs drop further. There has been a drop in the cost of data in the last 12 months – even if this is still insufficient. It is enabling real change such as people watching TV on phones (TV can be delivered for R1.50 per hour), and we may be heading towards free content and a far greater diversity of voices as people make and share more of their own content (e.g. edited video-making on cell phones). Data costs are higher than in Nigeria...are costs falling? What will make them fall? 3. Public access models (public Wi-Fi, free data access, etc.) / models to increase access and impact / argument to be made for free Internet (public utility)? 4. Minimum standards. 5. Guide that shows links between the Constitution and people's rights to access to information (media deficit issue) that can be used by policy makers and those who monitor policy. 6. Alignment with international efforts (not supported by South African government) regarding convergence and efforts to achieve Agenda 2030.

Summary of Discussions from Day 1	We need to better understand the Copyright Act, particularly in terms of open content and licensing, and re-use of SABC and copy-right materials.
Group Discussion on In-novations	<p>Develop thinking around pro-poor public interest content that travels across multi-platforms (as opposed to traditional model of public service broadcasting). Look at how to fund public service content.</p> <p>One or more interventions are necessary. It may be useful to separate these out as either “supply side” or “demand side” interven-tions...there was consensus that some kind of intervention was required for policy on both supply and demand sides.</p>

II. POLICY AND LEGISLATIVE OPPORTUNITIES

Source	Opportunity
Discussion on Media Deficit Briefing Note	A mix of regulation is required: “permission-less regulation”/data protection (by, for example, Facebook) and formal regulation (spec-trum and other issues).
Presentation from a Me-dia Sector CSO	<p>Government seems to be driven by a conservative agenda and the need to clamp down because of factional fights, vested interests and elements of corruption. The policy agenda is generally set by people beyond whom we can influence. The regulator (ICASA) has some good people; but many are captured by vested interests and/ or lack capacity and competence.</p> <p>We must take seriously attempts to impose the Chinese communi-cations model (wireless open network scheme and FPB hate crime space) and the Gupta communications model (sunshine journal-ism) on the country. We need to keep the communications space open. R2K is already working on the surveillance aspect of this.</p>
Presentation from a Me-dia Consulting Firm	<p>#SABCMustRiseAndDataMustFall – focus on working with SABC. A properly governed SABC could drive digital access and this could be supported by a single issue campaign, such as # SABCMustRiseAnd-DataMustFall.</p> <p>We need to envisage/focus on what a fixed SABC looks like. This is critical because SABC TV has an 85% reach and a monopoly on indigenous radio stations. Sadly, SABC has English text on its digital sites for all indigenous stations. The digital sites seem to be directed to advertisers.).</p>

Presentation from a Community Radio Sector Organization and Group Discussions on Research and Policy Group	<p>The ICT White Paper has now been tabled by the Department of Telecommunications and Postal Services (emanating from a process which started in 2012). It will require approximately 30 amendments to other statutes (through a 3-7 year process) in order to implement. This is a critical process that will require close sector engagement.</p> <p>The parallel policy process led by Minister Muthambi and the Department of Communication took Chapter 5 from the initial ICT Policy Review and has presented it as a cut and paste exercise. The issues are there, but the Minister has not applied her mind. We need to locate the Green Paper and circulate it.</p> <p>The ICT White Paper is a key point of engagement: we need to unpack it and comment on its implementation.</p> <p>We must simplify the ICT White Paper for use on community radio and in community newspapers for community engagement and education.</p> <p>We must engage with and train civil servants in policy-making spaces.</p>
Presentation from the South African Broadcasting Corporation	A few months ago the Statistician General stated he is already running with the open data concept, and will host a world first open data conference in Cape Town in 2017. Code for South Africa is working on a project entitled "Liberate the Government Gazette" – where people will soon have online and free access to the Government Gazette.
Group Discussions on Innovations	We need to see how the Promotion of Access to Information Act and the Protection of Personal Information Act can be turned from reactive to proactive processes. This feeds into issues of open / universal access. The African People's Convention has worked with Adv. Tlakula to have a resolution passed on the Internet as an enabler to human rights. This resolution means we can complain to the African Commission when governments do not uphold access to human rights.

III. OPPORTUNITIES IN INNOVATION

Source	Opportunity
Presentation from a Former Government Official	Places where there are progressive elements, and where we need to work, include community radio, subsidizing of STBs for poor, pressure to bring down data rates, spaces of innovation (value dynamics spectrum for opening up spaces for media poor), and local TV and music content regulations.

Presentation from a broadcasters' association	We know there are aggressive entrepreneurs wanting access to spectrum. Some say it is too late to influence broadband issues. It is very concerning how spectrum will be released. There are questions about whether South Africa will be able to migrate; whether citizens will have an enabling device to receive new digital content (initial introduction in the SKA area does not inspire confidence). Digital migration is not going ahead as it should for multiple reasons including corruption, state capture and vested political interests.
Presentation from a Media CSO	The first priority is that data should be open; and that citizens must engage with and be part of cleaning up data (information) This frees up a range of opportunities including citizen journalism and many more people's stories in the news space. We should call on government to provide free data and give access to existing and new data. (Example of government-citizen engagement in data: Code for Africa is engaged in a project where the government database of traditional surgeons in the Eastern Cape was turned into an app for use by parents and caregivers to verify registered circumcision schools to which they could send their boy children. City Press and Daily Sun gave coverage. People can report unregistered circumcision schools. Already more schools are registering; and an avenue for redress for boys who are disabled when circumcised has been provided. Citizens engage in "cleaning up" data. Another example is a water quality app being used in the City of Cape Town.)
Presentation from the South African Broadcasting Corporation	In light of declining audience figures it is clear the SABC has to speed up interest and production in digital content or it will not be able to retain consumers across different platforms. This opens opportunities for collaboration and may give the SABC, as a public service content provider, some muscle in going into mutually beneficial collaboration with technology and other service providers.
Presentations by Innovators and Plenary Discussion on Innovation	<p>Africa is a continent experiencing explosive growth in mobile penetration and usage, driven by the decreasing cost of smartphones / tablets and data. This has driven rapid increases in mobile video consumption. Tuntulu has become one of the largest providers of video / mobile content on the African continent, servicing this fast-growing market. Tuntulu is for profit. Onscreen Twitter-feed interaction with and between individual viewers are unique attributes of the Tuntulu application. There is an opportunity to speak further with Tuntulu. 52% of its population has access to Internet right now.</p> <p>Shika Moto is a community Wi-Fi mesh network offering free Internet-like services (access to information and communications), as well as digital literacy, skills development and community ownership of system. Media Monitoring Africa (MMA) installs and trains members of the community to run this</p>

	<p>How does one create community structures who own this? And how to incentivise use? MMA had ongoing engagement with communities for them to see the need and scope. The three communities where Shika Moto is being piloted are using it in different ways. So, for example, one community wanted a virtual database and network on early childhood development (ECD). MMA supported with digital skills and database development. Another community is using it to monitor and analyse community media, and for feedback mechanisms. MMA is looking to support any aspects of communication over the Internet, as identified by communities.</p> <p>Technology makes it possible to provide services in so many different ways. That's why some in the room are pushing for dynamic regulation.</p> <p>The Wi-Fi spectrum not managed. Shika Moto might need an ECNS license. It may be an idea to engage with ICASA on this.</p> <p>Shika Moto and Tuluntulu and others can certainly find synergies. Users must have an Android, Windows or BlackBerry phone with Wi-Fi access in order to participate for free.</p>
Presentation from a community radio organization	<p>CTV wants the support of progressive organisations. It needs business, technical, regulatory etc. type skills.</p> <p>Much of the work is already online, and CTV needs to develop an online strategy. But the focus will remain on TV; it does not want to compete with others who are online.</p> <p>CTV is in the enviable position of having too much content. There are about 25 independent production companies in Cape Town. CTV has incentivised producers through an advertising inventory where they get a good return on their investment; and is also running workshops on how these production companies can monetise their work.</p> <p>CTV sat on the ICASA local content structure, DTCAG, and been involved in other policy work</p>

	<p>CTV was not in line to be licensed as a part of DTT. CTV was not in line to be licensed as part of DTT. Their question has been “do we focus on policy and making things work well; or do we become renegades and identify gaps and create own opportunities within the chaos?” They began to look at channel free options and undertook a notional consultation process that got them 190 endorsements (from NGOs, community stations, etc.); researched platform options; and decided to go for satellite free-to-air (either through SENTECH or other – perhaps an Africa or a sub-Saharan Africa beam). CTV will explore options such as community screening facilities; as well as having a presence on pay platforms (e.g. through DStv) where it brings in money.</p>
Group Discussions on Innovations	<p>Dragon’s den / shark tank-type project or platform to input ideas and investment funding into innovative collaborative projects addressing media deficit issues.</p> <p>Use the considerable platforms at our disposal to encourage active community participation. By doing so we will build a new generation of people who will take issues forward. (“Free media free minds” type initiative on different platforms.)...there is interest in bringing back something similar to the CTV “free media free minds” programme with a focus on media freedom issues.</p> <p>Make engaging content that popularises media freedom issues for distribution across multiple platforms and that engages ordinary people on their issues</p>

IV. INFORMATION SHARING OPPORTUNITIES

Source	Opportunity
Group Discussions	<p>We need to map existing collaborations.</p> <p>If this initiative goes ahead it will be important to broaden it, make it more representative, and understand who we are and what we are trying to achieve.</p>
Group Discussions on Innovations	<p>MMA and the Council for Industrial and Scientific Research will host a forum to look into innovative models for delivering content and access. (Industry getting together to engage on access, technology, business models.) This could include talking to mobile operators, satellite and other distribution players to maximise reach of relevant content.</p>

<p>Presentation on Community Radio Networks</p>	<p>The DoC had a position paper on community radio. It decided each municipality must have its own radio station. There are over 200 licensed community radio stations, and approximately 170 are currently broadcasting. Some communities do not have any community radio station.</p> <p>Bush Radio was established in the late 80s/early 90s as an activist radio station. It was the first community station in South Africa, although it was only given a license in 1995. It has financial constraints. It does not carry much Afrikaans content based on demand (younger people don't want it).</p> <p>Bush radio does a lot of training, mentorship, internships, etc. It supports organisations across the country and the continent.</p>
<p>Group Discussion on Collaboration and Networking</p>	<p>The Internet Service Provider's Association and industry bodies have an annual iWeek/national IGF meeting in September. This is a very important space; and is open to having NGO engagement.</p> <p>Highway Africa is an annual media event in Grahamstown.</p> <p>The National Community Radio Forum will be running a week's activities, including around World Radio Day.</p> <p>Forum on Internet Freedom (FIFA Africa).</p> <p>The Association of Independent Publishers has regional conferences / workshops in provinces.</p> <p>The South African Communications Forum is interested in ongoing engagement, and will invite this group to its meetings.</p>

