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Media Viability in East Africa: Uganda



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Prepared by:

Paul Kimumwe, Adolf Mbaine, Rose Kimani, Hesbon Hansen Owilla and Njeri Wanjiru

Editors:

George Gathigi and Ann Hollifield

Reviewers:

Emilly Maractho and Julia Wegner

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The listed order of researchers who prepared this report is alphabetical

Executive Summary

Uganda has diverse legacy media with various newspapers and magazines, a growing broadcast media sector, which as of early 2020 was made up of 40 TV and 199 accredited radio stations. The country also has a fast-growing online media driven by rapid technological developments that have seen greater use of smartphones in the country. The News Media Organisations (NMOs) in Uganda have benefitted from liberalization and privatisation policies that the country adopted in the early 1990s, which freed the airwaves and made private investment in the country's media less complicated.

This national level media viability analysis of the Ugandan media is guided by the DW Akademie Media Viability Indicators (MVIs) covering the broad topics of politics, economics, community, technology, and content (Deselaers, James, Mikhael, & Schneider, 2019). Politics deals with the rule of law, freedom of expression, access to information, legal equality, and media within society. On the economic aspect, national economy, financial stability and independence of NMOs, competition and audience demand for quality journalism are analysed. The community indicators include: citizen education, social cohesion, trust and credibility, participation and audience data. The technological indicators are: production and distribution of resources,

NMOs' access to technology, audience's access to technology, digital expertise and citizens' digital rights. Lastly, content indicators include: content quality, journalism expertise and NMOs' ownership, business structures, competencies and business expertise.

The political environment under which Ugandan media operate is quite complex. On the one hand there are constitutional guarantees on media freedom and adoption of international and regional instruments that provide for the same. On the other hand, media organisations continue to operate in restrictive contexts which have seen bolder organisations threatened and in some instances shut down for indefinite periods of time. The threats to free expression and freedom of the media have been incremental as the regime of President Yoweri Museveni stretches over its fourth decade. In addition, laws like the Access to Information Act are difficult to implement under the current circumstances.

On the economic front, Uganda is a small economy and remains among the poorest in the world and this is reflected in the size of the media industry. Print circulation numbers for the Ugandan newspapers continue to plummet, while print advertising

spending has seen a steady decline over the last years. Uganda has a comparably high number of radio stations on air in the region, but their viability is challenged by high competition for limited advertising money. Additionally, the revenues derived from advertisements, announcements and sponsorships have drastically reduced, due to a weak economy with limited industrialization. There is also growing competition from online and social media. Community radio stations in Uganda face constraints in their financial longevity as they majorly rely on donor support.

With regard to the relationship between the media and the community, media literacy levels among Ugandans are comparatively low and are increasingly so as one moves from urban to rural areas. The phenomena of misinformation and disinformation have contributed to the loss of trust and credibility of media houses in Uganda. Some of the media outlets in Uganda have had their credibility questioned following publication of questionable stories. Audience data reveal that the majority of the Ugandan audiences in urban and rural areas rely on radio to access information, while television viewing is more prevalent in the urban areas.

Improved technology, particularly social media, means citizens have alternative sources of information and even with the risk of falsehood, some events that have been covered live on a timely manner have helped the public discover falsehood or misinformation fairly quickly. However, the social media tax instituted in 2018 has been a deterrent to social media access as it has led to a drop in the use of the internet (Dahir, 2019). Gillwald, Mothobi, Tusubira and Ndiwalana (2019) also note that the taxes are likely to reduce internet penetration and the intensity of use of the internet. This, they argue, has a negative ripple effect in the grand scheme of communication as it diminishes the extent to which Uganda enjoys the network effects associated with economic growth and development.

Looking at technology access for media themselves, the review found that NMOs in Uganda generally had affordable access to the basic technologies to produce news. The country also has experienced

an increase in access and use of Information and Communication Technologies (ICTs), especially the internet. The Internet World Stats (2020) indicate that for a population of 47,123,531, Uganda has an internet penetration of 39.30 percent with 18,502,166 Ugandans having access to the internet. Though this bodes well for Ugandans' access to information, the challenge for media outlets remains how to creatively harness the new technologies, especially as some government actions and taxation policies are still regressive with regard to technology access.

Lastly, with regards to content, there are criticisms particularly directed at private/commercial radio stations for largely focusing on entertainment at the expense of news and public affairs. Financial instability, especially among smaller media houses in Uganda, makes them not only vulnerable to corruption and intimidation, but also shifts their focus to cheaper entertainment content and generally affects the quality of public interest content

they invest in. Additionally, media owners influence major decisions made in the newsrooms for political and economic reasons, impacting independent reporting. There is a shortage of professional media practitioners especially in the rural based radio and television stations, and much fewer women in the media, with the available few mainly involved in reporting soft rather than hard news, unlike their male counterparts.

Overall, the examination of structural and societal conditions in the country in relation to news media viability suggest that the overall trends have not been too favourable in the last years. Thus, Uganda's NMOs are likely to face increased obstacles in producing high-quality journalism from external factors such as political, economic, and social conditions in the near term. Understanding these trends is critical to helping policy makers, industry leaders and journalists identify places where policy changes can support improved news media viability.

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List of Abbreviations

ACME: African Centre for Media Excellence	MVI: Media Viability Indicators
AMB: Africa Media Barometer	NBS: Nile Broadcasting Services
ATIA: Access to Information Act	NITA-U: National Information Technology Authority
BBC: British Broadcasting Corporation	NMG: Nation Media Group
CEMCO: Centre for Media Literacy and Community Development	NMOs: News Media Organisations
CIPESA: Collaboration on International ICT Policy for East and Southern Africa	NRM: National Resistance Movement
CKW: Community Knowledge Worker	NTV: Nation Television
CPJ: Committee for the Protection of Journalists	OTT: Over the Top Services
GDP: Gross Domestic Product	PWC: Price Waterhouse Coopers
HIM: Hub for Investigative Media	RSF: Reporters without Borders
HRNJ-U: Human Rights Network for Journalists-Uganda	UBC: Uganda Broadcasting Corporation
ICT: Information and Communication Technologies	UBOS: Uganda Bureau of Statistics
ICT4D: Information and Communication Technologies for Development	UCC: Uganda Communications Commission
IOM: International Organisation for Migration	UMWA: Uganda Media Women's Association
MCI: Media Challenge Initiative	UNESCO: United Nations Education, Scientific and Cultural Organisation
MoICT&NG: Ministry of Information and Communication Technologies and National Guidance	WB: World Bank
	WJP: World Justice Project
	WPFI: World Press Freedom Index

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Overview: The Media Industry In Uganda

According to the World Bank (2019) 46.5 percent of the Ugandan population is under the age of 15 while 24.37 percent of the population live in the urban areas (World Bank, 2019). Literacy rates in Uganda, though comparatively low, have continually increased in recent years, currently standing at 76.53 percent (UNESCO, 2020). Further, there is a distinctive gender disparity in the adult literacy rate, which stands at 82.66 percent among men and 70.84 percent among women.

The Constitution of Uganda, promulgated in 1995, recognises 65 indigenous communities. English and Kiswahili are the official languages while Luganda is the most widely spoken indigenous language, among many other local languages.

According to the Uganda Communications Commission (UCC) Q3 2019 report, there were 40 operational TV stations in Uganda and eight pay TV service providers (UCC, 2019a). The UCC (2020) indicated that as of late 2020, there were 202 accredited and licensed radio stations. A media landscape mapping conducted by the Media Futures research team identified 23 digital native NMOs in Uganda as of May 2020. The Government's Uganda Broadcasting Corporation (UBC) operates 10 radio stations. Over half of the radio stations in Uganda can be classified as small FM stations, which are often hybrids of community type but not always with a community label (Myers & Harford, 2020).

The biggest media conglomerates in Uganda, Vision Group and Nation Media Group (NMG), own media outlets across platforms. The Vision Group publishes at least 10 newspaper titles, operates three television stations and six radio stations. The Vision Group publishes its newspapers in English and the local languages. The NMG publishes Daily Monitor and operates NTV-Uganda.

Though print circulation numbers have continued to decline in Uganda, Bukedde and The New Vision daily newspapers continue to take lead while Daily Monitor comes in third. Circulation estimates for the last quarter of 2019 by the Audit Bureau of Circulations of South Africa (ABC) indicated that

Bukedde had an average of 33,289, The New Vision had an average of 23,636 and Daily Monitor had an average of 16,169 print copies (Uganda Business News, 2020).

The Uganda Media Landscape Report by BBC (2019) indicated that a majority of the Ugandan adult population at 87 percent had access to radio, 74 percent had access to a mobile phone, 34 percent had a working television while only 13 percent had access to internet within their household (BBC Media Action, 2019). Ipsos also indicated that 73 percent of the population tune into radio at least once per week compared to only 28 percent who view television while 27 percent log in to online platforms (Myers & Harford, 2020).

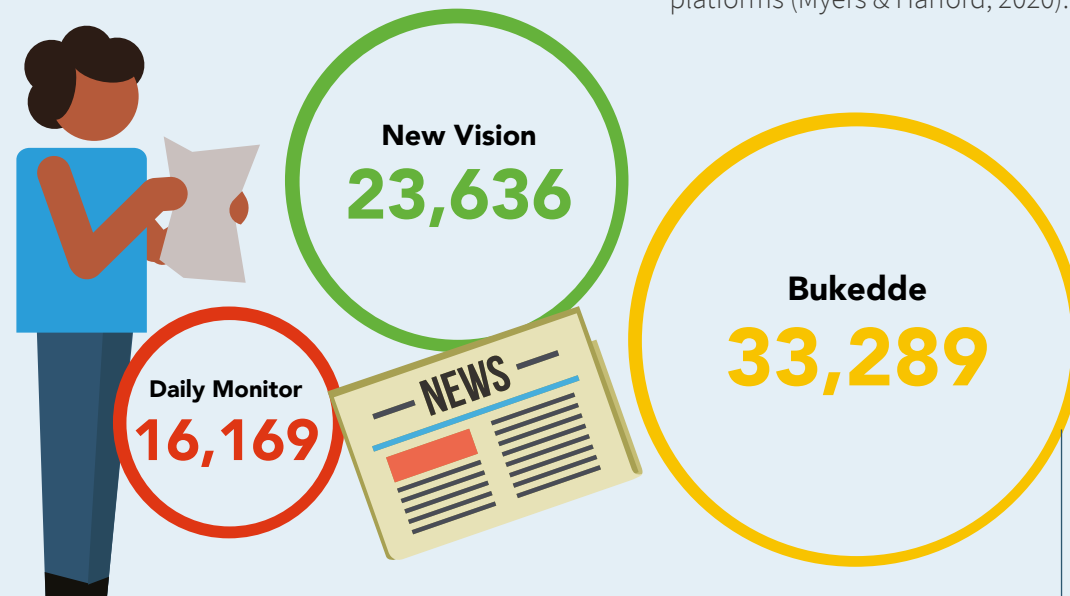


Figure 1:
Circulation
Figures 2019
(Uganda
Business
News, 2020)

Methodology

The goal of this report is to provide an overview of the news media landscape and operating environment in Uganda. Such an overview provides a foundation for understanding the institutional and structural context in which Ugandan news media organisations (NMOs) and professionals work. The authors used DW Akademie's Media Viability Indicators (MVIs) index as the framework for gathering relevant data for this report on national-level factors that affect news media performance in Uganda (DW Akademie, 2019).

DW Akademie developed the Media Viability Indicators index over a period of four years,

beginning in 2015. The indicators and sub indicators are based on research on news media economics, management and sustainability, existing national assessment tools published by credible world organisations and NGOs, and in consultation with journalism researchers and professionals around the world. The indicators were field tested in February 2019 before being published.

This report provides an overview of the media landscape of Uganda using the structure and variables outlined in the MVIs and, where applicable, some of the specific measures where those measures in the MVIs use third-party assessments. The

researchers used document analysis, a qualitative research procedure that systematically analyses and examines text, reports and data in order to elicit meaning, gain understanding and develop empirical knowledge (Gross, 2018; Bowe, 2009). The MVIs provided a framework for the systematic analysis of different documents and reports published by different reputable organisations to generate this report. In general, however, the report is not based on the structured interview-based methodology recommended by DW Akademie for a full MVI assessment (DW Akademie, 2020).



1.0 Politics

Media organizations operate within political and regulatory frameworks that have significant impact on their organizational viability. If they are to perform their watchdog role of informing the citizenry, news media organizations are dependent on the existence and enforcement of laws at the national and local levels that protect free expression and guarantee access to government information. The overall rule of law, when respected and enforced, affords the public the freedom to not only freely express themselves, but to also be informed by independent and free institutions.

Meyen, Fiedler, and Schamberger (2016) note that in Uganda, media freedom and journalists' independence is limited by the media's relative societal position. The media is perceived to be at the bottom rather than the top of the Ugandan society, a situation that has enabled the government to implement media laws and regulations that have birthed unpredictability and consequently a sense of insecurity amongst the professionals in the media industry. Maractho (2015) contends that the gap in

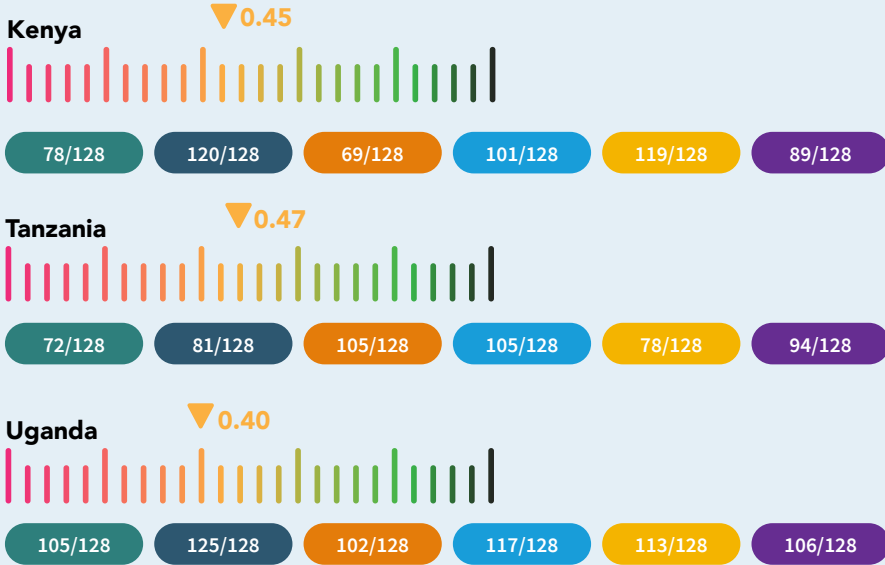
legislation and policy making between 1993 and 2013 created media types that are neither diverse nor independent. Mbaine (2019) argues that there is a clash in the understanding of media roles, notably on the part of political actors and a government whose actions are increasingly becoming authoritarian. While there exists an understanding of the role of the media as the purveyor of public information, mainly from the perspective of a liberal democracy, media organisations are subject to political and economic pressure and the attendant implications on free speech and freedom of the media.

1.1 Rule of Law in Uganda

The World Justice Project (WJP, 2020) gave Uganda an overall Rule of Law Index score of 0.40 on its scale of 0 to 1, where a 1 indicates strongest adherence to the rule of law. Further analysis of the WJP (2020) index indicates that Uganda is ranked 105/128 on Constraints on Government Power, 125/128 on Absence of Corruption, 102/128 on Fundamental Rights, 102/128 on Open Government, 113/128 on Order and Security, 106/128 on Regulatory Enforcement, 108/128 on Civil Justice, and 113/128 on Criminal Justice.



- Constraints on Government Powers
- Absence of Corruption
- Open Government
- Fundamental Rights
- Order and Security
- Regulatory Enforcement



| Figure 2: Overall World Justice Project (WJP, 2020)

Freedom House (2020) rated Uganda as Not Free because of attempts by the establishment to restrict free expression through surveillance of electronic communications backed by the Regulation of Interception of Communication Act (GoU, 2010), and regressive tax on social media use. Uganda's overall score is 34/100 with a score of 11/40 for Political Rights and 23/60 for Civil Liberties (Freedom House, 2020). Freedom house notes that journalists in Uganda operate in an unfriendly environment characterised by threats, assaults, and arrests from the authorities, notably the police and the army.



While there exists an understanding of the role of the media as the purveyor of public information, mainly from the perspective of a liberal democracy, media organisations are subject to political and economic pressure and the attendant implications on free speech and freedom of the media.

1.2 Freedom of Expression

The Constitution of the Republic of Uganda, in line with international legal instruments on free expression, as captured in Article 29 (1) (a) states that: “Every person shall have the right to freedom of speech and expression which shall include freedom of the press and other media.” However, Article 43 (1) places a limitation thus: “In the enjoyment of the rights and freedoms prescribed in this Chapter, no person shall prejudice the fundamental or other human rights and freedoms of others or the public interest.”

Despite the constitutional protection, the WJP (2020) gave Uganda a score of 0.39 out of 1 for protections for freedom of expression. Reporters Without Borders (RSF, 2020) World Press Freedom Index (WPFI) ranked Uganda 125 out of 180 countries with a score of 40.95. The WPFI rank for Uganda has continually declined over the past five years though in 2020 the score increased by +1.53 from 2019, though the ranking remained the same (RSF, 2020).

Freedom House (2020) scored Uganda 1/4 on the Existence of Free and Independent Media, and 2/4 on Freedom of Expression, that is, whether individuals are free to express their personal views on political

or other sensitive topics without fear of surveillance or retribution. Acts of intimidation on journalists and media houses are rampant (Freedom House 2020), while the daily social media tax of \$0.05 has seen a decline of social media users, thus impeding freedom of expression, and affecting the productive taxes that result from intense use (Gillwald, Mothobi, Tusubira & Ndiwalana, 2019). The social media tax removed free universal access to information, which is a pillar of any democracy (Maractho, 2020). The negative ripple effect is that telecommunication businesses then reduce their advertising spend and most significantly the inherent constraints also diminish the extent to which Uganda enjoys the network effects associated with economic growth and development.

Studies undertaken by the Human Rights Commission and the Human Network for Journalists – Uganda (HRNJ-Uganda, 2012) on the existing legal framework in Uganda and whether it promotes media freedom indicated that several pieces of legislation currently do not safeguard the growth of media, but rather seek to control and criminalize the work of journalists. Incidences such as arbitrary internet shutdowns during elections period by the UCC, switching-off of radio stations by authorities and escalating incidents of attacks on journalists and institutions working on the safety of journalists continue to undermine the freedom of expression in Uganda (Mbaine, 2017; Mbaine, 2019; Lugalambi, Mwesige & Bussiek, 2010; African Media Barometer (AMB), 2012).

1.3 Access to Information

The right of access to information in Uganda is enshrined in Article 41 of the Constitution and the 2005 Access to Information Act (ATIA, 2005). Article 5 of the ATIA 2005 provides for the right to access information held by the state or its agencies unless access to such information prejudices the security and sovereignty of the state or violates the right to privacy of other citizens.

The Whistle Blowers Protection Act (2010) was enacted to protect persons disclosing evidence of contravention of the law, maladministration, or corruption in government bodies; to promote transparency and accountability in all organs of the state by providing the public with timely,

accessible and accurate information; and empower the public to effectively scrutinise and participate in government decisions that affect them.

Despite these developments, obtaining government-held information is still a challenge for many, as implementation has remained quite subjective and inconsistent (CIPESA, 2017). For instance, a position paper by CIPESA presented to parliament found that although Section 43 of the ATIA 2005 requires every minister to submit to parliament an annual report detailing the requests for information made to their ministry and public bodies under it, the ministries do not comply with this provision. This law remains largely un-implemented and unknown to both public officials and ordinary citizens and no minister has submitted such reports since 2005 (CIPESA, 2017).

Similarly, the World Justice Project scored Uganda 0.44 out of 1 for the Right to Information and 0.14 for Publicized Laws and Government Data (WJP, 2020). Freedom House scored Uganda 1/4 on the measure,

Does the government operate with openness and transparency? These scores are based on the fact that a majority of the government ministries deny requests to access information despite the provisions in the ATIA 2005 (WJP, 2020). Freedom House (2020) also notes that other laws related to national security and confidentiality restrict access to information and that the public procurement procedures lack clarity. Therefore, there is no clarity on what to access and what is classified as national security information that is restricted from public access for national security reasons.

These findings on the right of access to information suggest that whereas Uganda has adequate legal provisions, the government has largely failed to publicise these laws and either operates with less transparency or makes it difficult for the public to access information by invoking Article 5 of the ATIA 2005. Moreover, many citizens also seem to be insufficiently aware of their rights, a situation that has resulted in organisations like CIPESA questioning the government's implementation of the law.



Similarly, the World Justice Project scored Uganda 0.44 out of 1 for the Right to Information and 0.14 for Publicized Laws and Government Data (WJP, 2020). Freedom House scored Uganda 1/4 on the measure, Does the government operate with openness and transparency?



Reporters Without Borders (2020) observed that media practitioners in Uganda operate in an unfriendly environment characterised by frequent acts of intimidation and threats. Criticism of the government authorities by media practitioners or activists has resulted in media equipment confiscation, physical assaults, and abductions.

1.4 Legal Equality

There are no NGOs that score Uganda on issues of legal equality. While NMOs in Uganda seemingly operate under the same laws, policies and regulations as any other economic entities, Kimumwe (2014) notes that the overarching legal framework is helping the State to control instead of regulate the media.

1.5 Media within Society

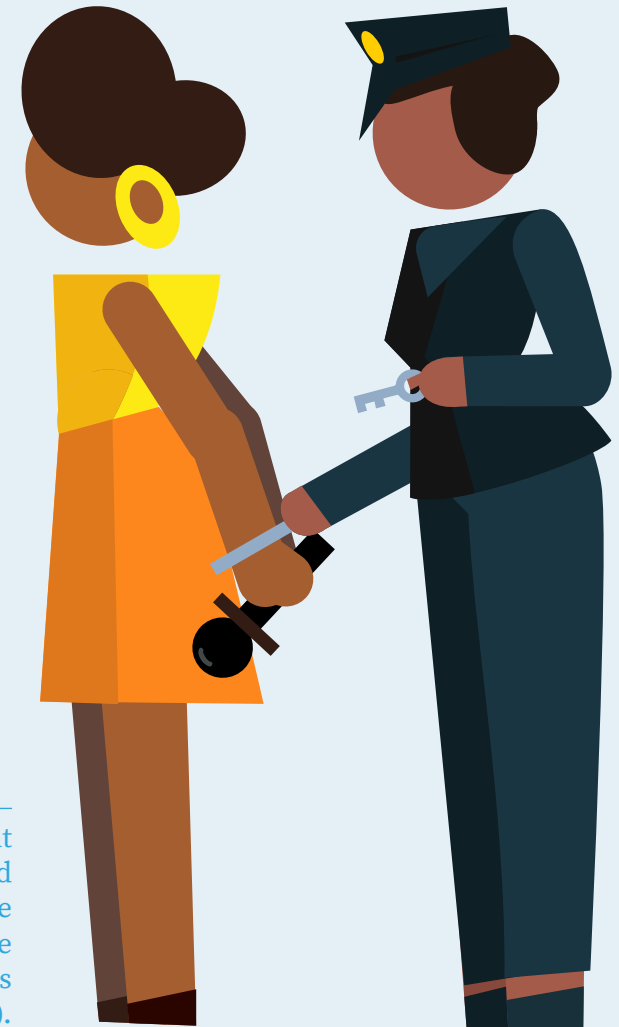
The emphasis on economic survival and profit maximization has compromised the media in public interest journalism roles globally. Moreover, the relationship between government authorities and media practitioners is integral for the viability of the media, especially in delivering their functions to the society in a sustainable way.

Reporters Without Borders (2020) observed that media practitioners in Uganda operate in an unfriendly environment characterised by frequent acts of intimidation and threats. Criticism of government authorities by media practitioners or activists has resulted in media equipment confiscation, physical assaults, and abductions. The president has also shown little regard for the media practitioners and often uses insulting language when referring to them (RSF, 2020).

The directive by the UCC which requires “all online data communication service providers including online publishers, online news platforms, online radio and television operators” (UCC, 2019b, para. 6) to seek permission to operate from the UCC, essentially limits freedom of expression and of the media on digital platforms (Freedom House, 2019). Freedom House also recorded incidences of threats, intimidation, and detainment of media practitioners in Uganda and further noted that independent media outlets are at perpetual risk of regulatory interference by the UCC. The 2020 Freedom House report cited Pearl FM, which was ordered to suspend a popular political talk show in October 2019 following complaints from security agencies (Freedom House, 2020). An earlier report cited Unity FM, which was closed in November 2018 for pointing out incompetency by the police force (Freedom House, 2019).

The Committee to Protect Journalists (CPJ) recorded two deaths of journalists in Uganda in 2002 and 2010. In 2002 a journalist who was covering demonstrations was fatally shot by police who were dispersing demonstrators while CPJ noted that in 2010 a journalist was murdered. CPJ (2019) also recorded arrests and detention of eight Ugandan journalists by the police in 2017. Between April and May 2020, CPJ (2020) reported that government officials from the District of Kabale arrested a journalist, assaulted another and confiscated the equipment from a radio journalist. The accusations for these arrests and intimidation range from negative coverage of the government to giving opposition politicians platforms to voice their dissent by hosting them in radio stations (CPJ, 2020). These incidences indicate an unfriendly environment for journalists in Uganda and a sense of self-censorship, which negatively affects development (Cohen & McIntyre, 2020).

Between April and May 2020 CPJ (2020), reported that government officials from the District of Kabale arrested a journalist, assaulted another and confiscated the equipment from a radio journalist. The accusations for these arrests and intimidation range from negative coverage of the government to giving opposition politicians platforms to voice their dissent by hosting them in radio stations (CPJ, 2020).



2.0 Economics

The economic health of a nation is a critical factor in news media viability. The strength of the local economy and the distribution of wealth across the population affects citizens' ability to buy news media products and the devices through which news content is distributed. A thriving consumer economy is necessary for a thriving advertising market, which makes access to news affordable for consumers at all socioeconomic levels. News media organizations need diverse, stable, and sustainable revenue streams as a protection from forces that seek to influence editorial decisions and to provide the resources needed to produce high-quality journalism. There must be enough competition among news organisations to encourage journalistic excellence, but not so much that audiences for

individual media houses become too small to be financially sustainable.

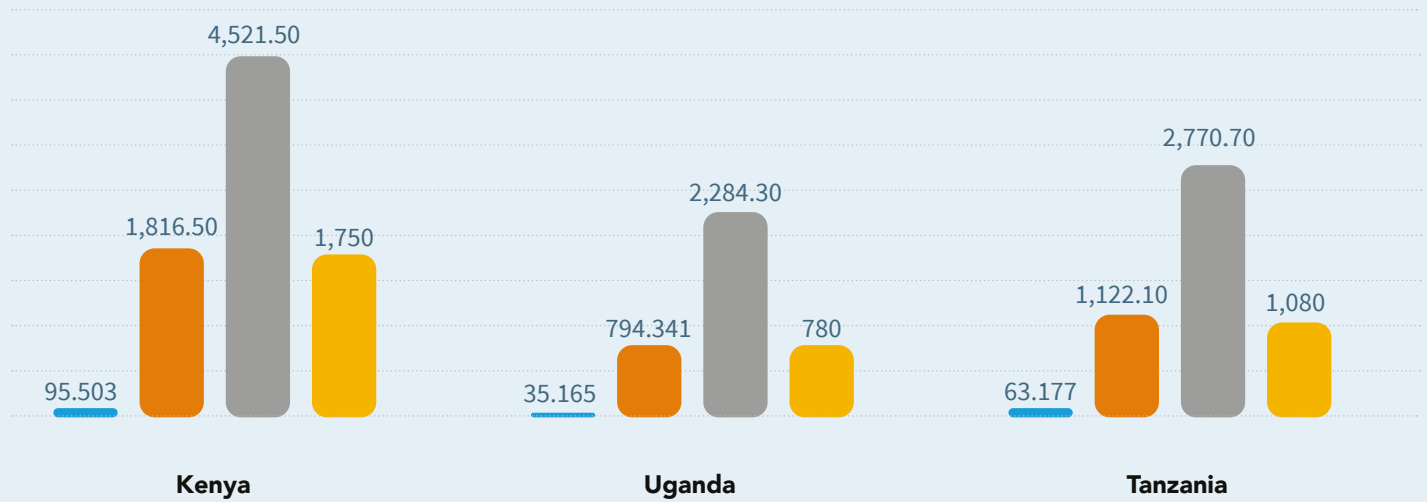
According to the World Bank (2020), even though Uganda remains among the poorest countries in the world; it is also one of the countries in Sub-Saharan Africa with the highest rates of poverty reduction. In the 2016 poverty assessment, poverty in Uganda reduced significantly between 2006 and 2013, but in the five years to 2016 the economic growth slumped to 4.5 percent from 7 percent the previous years. The medium-term growth of the economy in the wake of the COVID-19 pandemic does not look favourable, and the World Bank (2020) attributes this to the pandemic, decline in real GDP growth and the attendant loss of jobs and the uncertainty that

was created around the February 2021 elections.

The media industry reflects the small size of the economy. Despite the diversity of outlets, the limited advertising streams and the existence of only two major players (Nation Media Group and Vision Group) present a media ecosystem grappling with enormous challenges in its quest to produce high quality journalism in a sustainable way (Tumusiime, 2016). The number of independent journalists and financially sustainable media outlets that are critical of the government has been on the decline in recent years due to escalating government restrictions, intimidation, and harassment, including physical attacks and ownership trends (Nassanga & Tayebwa, 2018).



- GDP
- GDP per capita
- GDP per capita, PPP
- GNI per capita

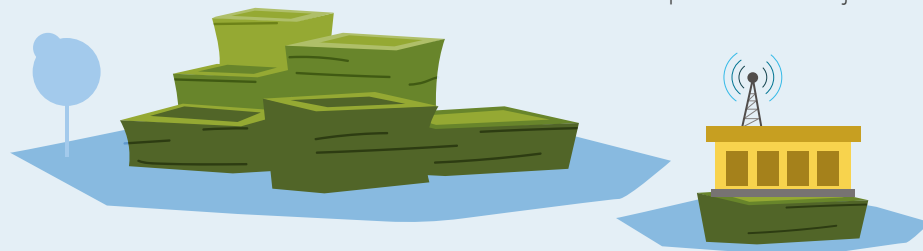


| Figure 3: National economy (World Bank, 2019)

2.1 National Economy

The World Bank classifies Uganda as a lower income country (World Bank, 2019). The GDP in US dollars is estimated at \$35.165 billion and the GDP per capita is \$794.341. The country's GNI per capita is \$780 while the GDP Per capita, Purchasing Power Parity (PPP) is \$2,284.30 (World Bank, 2020). Before the COVID-19 disruption it was projected that the Ugandan economy would grow by 6.3 percent in the financial year 2019/2020, having grown by 6.1 percent in the financial year 2018/2019 (PWC, 2019).

Compared to Kenya and Tanzania, Uganda has the lowest GDP per capita (\$794.341) and the lowest GDP per capita – Purchasing Power Parity (\$2,284), which suggests that Uganda has comparably lower economic output and that a sizable chunk of the population has a relatively low level of disposable income. Figure 3 above with more details.



The radio stations revenues derived from advertisements, announcements and sponsorships have drastically reduced (The Independent, 2020). Myers and Harford (2020) note that majority of the “proximity stations” ... have difficulties attracting advertising and sponsorships, which consequently affect their public interest journalism operations.

2.2 Financial Stability of News Media Organisations

With 40 operational TV stations (UCC, 2019a) and 202 accredited radio stations (UCC, 2020), the airwaves are already oversubscribed in Uganda. According to Chibita (2006) the proliferation of the radio stations in the country means that there are many media outlets chasing after little advertising money. The radio stations revenues derived from advertisements, announcements and sponsorships have drastically reduced (The Independent, 2020). Myers and Harford (2020) note that majority of the “proximity stations” which generally encompass community radio stations, local or vernacular and both for profit and non-profit radios stations targeting particular areas and/or language groups have difficulties attracting advertising and sponsorships, which consequently affect their public interest journalism operations.

Community radio stations in Uganda also face financial constraints as they majorly rely on donor support. Unwanted Witness Uganda (2014) established that lack of funds limits the operations of community radio stations which sometimes go off-air during power outages because they have no finances to fuel their generators. Unwanted Witness Uganda also noted that these stations experience high turnover of volunteer journalists who gain experience in the stations and move on to other paying stations due to financial constraints that make it hard for the community radio stations to retain them.

The print circulation numbers for Ugandan newspapers continue to dwindle, as does the advertising revenue (Uganda Business News, 2020). According to Ipsos, the print advertising spend declined from 16 percent to 13 percent in 2018 with minimal prospects of improvements in the coming years (Kyamutetera, 2019). Data on broadcast media is scarce. However trends in Kenya and Tanzania, which are relatively similar to Uganda's, indicate that even though the advertising market has grown and was projected to grow barring the COVID-19 pandemic, the emergence of many players on the digital platform has disrupted the flow of advertising revenues to legacy media as the new entrants are also tapping into the advertising market share (PWC, 2018). The \$0.05 daily tax on social media users has also exacerbated the viability challenges of media outlets as it has led to decline in consumption and

access to media sites (Nanfuka, 2019). Nanfuka laments the coming to force of the social media tax, noting that the internet and access to social media had broadened the media ecosystem, providing multiple avenues for sourcing and dissemination of information. But with the tax there appears to be limited access and of course a decline in consumption, a situation that Gillwald, Mothobi, Tusubira and Ndiwalana (2019) also decry.



Advertising spend in Uganda is mainly by the private sector with corporate companies, beverage and telecommunication firms listed as the biggest spenders contributing US\$ 65.7b, US\$52.1b and US\$43.9 in the first half of 2018 period respectively (Kamukama, 2018).

2.3 Financial Independence of News Media Organisations

Advertising spend in Uganda is mainly by the private sector with corporate companies, beverage and telecommunication firms listed as the biggest spenders contributing US\$ 65.7b, US\$52.1b and US\$43.9 in the first half of 2018 period respectively (Kamukama, 2018). A study by Kazibwe (2018) revealed that advertising influences news content in the Ugandan NMOs with practitioners indicating that stories that would antagonize major advertisers are rarely aired. Kazibwe observed that corporate promotions are dominant in the news since the news media houses compete to appease major advertisers. Cohen and McIntyre (2020 citing Nassanga, 2009) also argue that media content is predominantly targeted at meeting the interests of advertisers at the expense of public interest.

The Ugandan government is also a key player in the media landscape through advertising and its ownership of the national broadcaster UBC and state-owned commercial media group, the Vision Group, which has 10 newspaper titles, three TV stations and six radio stations. According to Myers and Harford (2020) the Ugandan government dominates the advertising market, which is limited given the country's GDP per capita of \$794.341 (World Bank, 2019) which suggests that consumers have relatively low amounts of disposable income to purchase media products or to be lucrative to

advertisers. This has influence on the editorial independence of the media, as Myers and Harford (2020) found the government and political elites to be vital sources of revenue, especially for radio. The media thus straddles the thin line of courting politicians in government on the one hand, and maintaining editorial integrity on the other.

In the 2019/2020 financial year, the Ugandan government introduced a centralized media buying strategy for communications from ministries, departments and agencies through the Ministry of Information and Communications Technology (Tajuba, 2019). There is a high likelihood that the government will leverage on this centralised advertising power to direct advertising dollars to media houses that do the government's bidding at the expense of those critical of its policies and actions. Dr William Tayeebwa, the head of Journalism and Communication department at Makerere University argues that this is a ploy by the government to enforce compliance that will further compromise the independence of the media and drive media houses that do not comply out of business (Tajuba, 2019). Other analysts in Uganda also argue that centralisation of media buying by the government is a carrot-and-stick strategy that will compromise critical reporting of government as media houses will fear losing on the government's advertising revenue.

2.4 Competition

Uganda has a diverse and competitive media sector, and as pointed out earlier the country has 202 accredited and licensed radio stations (UCC 2020), 40 TV stations and eight pay TV service providers (UCC 2019a) and 23 online NMOs. A GeoPoll (2018) survey showed that the top five radio stations in Uganda (Capital FM, 10%; Bukedde FM, 4%; Radio West, 4%; NBS, 3% and Radio Simba 3%) had an overall audience listenership share of 24 percent, which speaks well of the diversity in competition. The radio market thus seems to be fragmented; as the BBC (2019) Media Landscape Report indicated, most of the licensed radio stations enjoy varying degrees of popularity and high listenership in different regions.

TV on the other hand had the top five stations (NTV, 20%; Bukedde, 13%; NBS TV, 11%; Bukedde 2, 11% and Spark TV, 7%) commanding a 58 percent market share of the audience with NTV the market leader and “widely considered to be the most reliable, objective and comprehensive news source in the country” (BBC, 2019, p.7).

Findings from the current study indicate that there are 23 online news media outlets in Uganda, whilst actual weekly usage of the internet is at 27 percent in Uganda. Myers and Harford (2020) note that though radio is still most prevalent in Uganda, the radio audience is slowly diminishing in favour of the

internet. There are more than 30 newspapers (both print and online) (Myers & Harford, 2020), though the newspapers and magazines market in Uganda has not increased as fast as the broadcast and internet sector. This is largely due to the perennially low literacy levels and a struggling economy that leaves the majority of the citizens with very little disposable income.

Kimumwe (2014) notes that liberalisation and expansion of the broadcast sector in Uganda has created a competitive environment for private players in broadcasting. The Ugandan government

has tried to decrease its subsidies to the communication sector in order to facilitate a market led interaction with the readers, listeners and viewers and additionally implemented a system of regulations and licensing of competitive operators (UCC, 2016). Thus, the media space can be said to be open, in terms of participation in the industry. However, there remain regulatory challenges that the industry needs to overcome to achieve a robust, efficient, transparent and informative media industry in Uganda (Kimumwe, 2014; Nassanga & Tayeebwa, 2018).

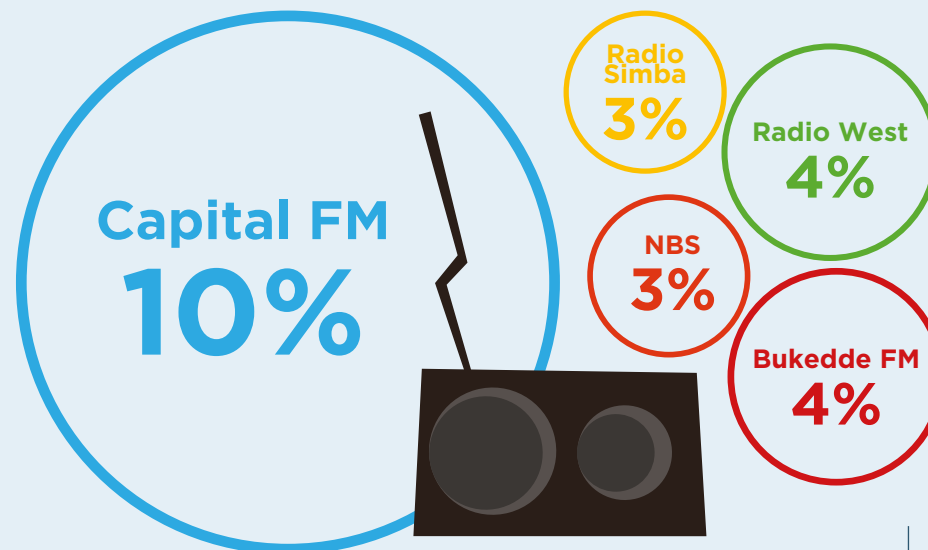
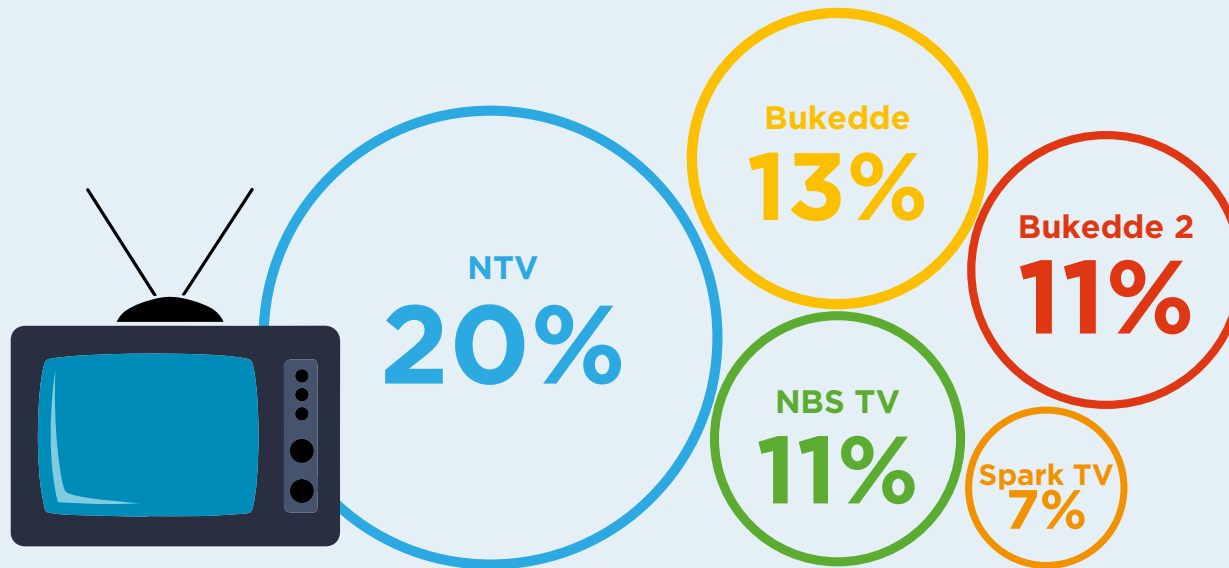


Figure 4: Top Five radio stations (Geopoll, 2018)



| Figure 5: Top five television stations (BBC 2019)

2.5 Audience Demand for Quality Journalism Content

As of 2019, Uganda was classified as a Lower Income country, with a GDP of \$ 35.165 billion and GDP per capita of \$ 794.341 (World Bank, 2020). As a struggling economy with a public that has a very low purchasing power, the media outlets are struggling with production of quality content while the audience struggling with purchase and access to quality content (Myers & Harford, 2020). Baguma (2012) identifies limited resources as an existing challenge to quality journalism in Uganda, noting that the operating budgets are seen to be prohibitive of the robust processes that guarantee high levels of quality reportage.

Ugandans consume radio more than any other media; Myers and Harford (2020) cite 2018 data which indicated that 73 percent of the population tuned into radio at least once a week, compared to only 28 percent for television and 27 percent online. Unlike TV, the demand for radio is not on a national level and there is no single radio station that attracts listeners from across the country (BBC, 2019). For instance, Capital FM, the radio station with the highest national listenership ratings (10%) is not even among the top three radio stations in five of the eleven regions in Uganda and it is only the top radio station in two regions (BBC, 2019). These findings suggest that the audience for the most consumed media is fragmented and their demands are fragmented which would be in line with the large

number of recognised indigenous communities. Future studies may therefore want to focus on the issue of audience and radio fragmentation and the related cause and effect.

Studies have also shown that media outlets work hard for integrity and reputation and strive to be “trusted by their listeners and to be seen as reliable sources of quality journalism” (Myers & Harford, 2020, p. 23). However, even with the demand for quality content, the proliferation of information on digital platforms has made it hard for media outlets to reap from the massive investments in the production of premium content.

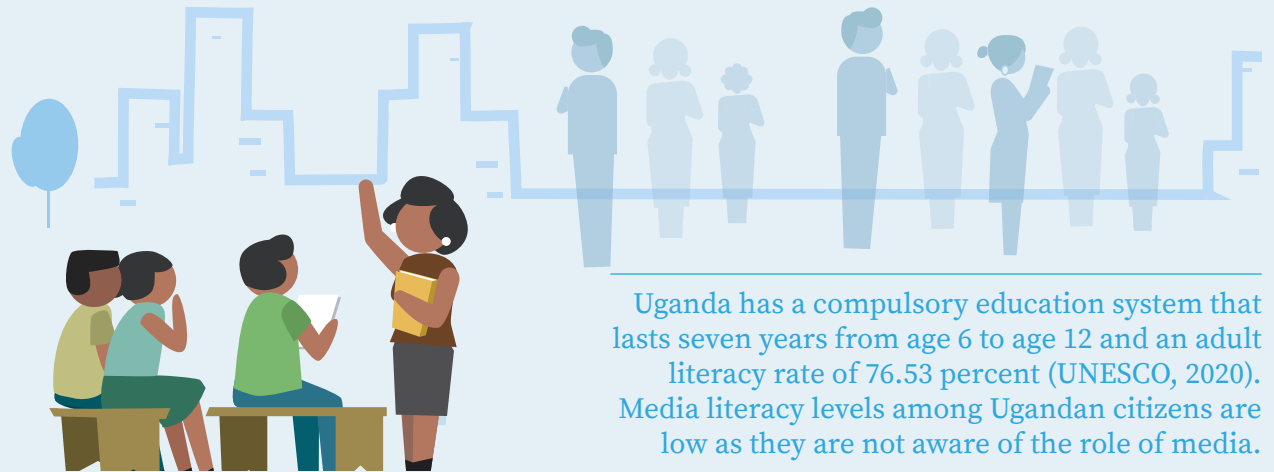
3.0 Community

Democracy requires citizens to be informed if they are to effectively perform their duties as citizens. The concept of community focuses on the structure of society and the degree to which social conditions support a population willing and able to consume news content, and a news media industry willing and able to understand and serve their communities. The community factors that are related to news media viability include citizens' general level of education and ability to evaluate the accuracy and credibility of news content; the degree to which the society is peaceful and the majority of the population share a general system of values; the level of trust and credibility the news media have with the general public; and the degree to which news media organizations have both access to quality data about their audiences and the skills required to understand and apply those data to news decisions.



Kenya	82.00%
Tanzania	78.00%
	<small>2015 data only</small>
Uganda	76.53%

| Figure 6: Literacy Rate (UNESCO, 2020)



Uganda has a compulsory education system that lasts seven years from age 6 to age 12 and an adult literacy rate of 76.53 percent (UNESCO, 2020). Media literacy levels among Ugandan citizens are low as they are not aware of the role of media.

3.1 Citizen Education

Uganda has a compulsory education system that lasts seven years from age 6 to age 12 and an adult literacy rate of 76.53 percent (UNESCO, 2020). Media literacy levels among Ugandan citizens are low as they are not aware of the role of media (Nassanga & Rwabu, 2017; AMB, 2012). These low media literacy levels have allowed for the exploitation of the public by allowing the financial incentivisation of journalists to cover certain events and to let others go unnoticed (Nassanga & Rwabu, 2017). Furthermore, it has been observed that a majority of Ugandans residing in the rural areas are not aware that they are entitled to express themselves freely and often shy away from making bold commentaries on media platforms (AMB, 2016).

Various organisations have, however, engaged in initiatives to raise media literacy levels in Uganda. For instance, the African Centre for Media Excellence (ACME) runs a media literacy training project targeting various publics such as the youth, human rights activists and public officers, amongst others, to improve their skills in engaging with the media. The Acacia Programme, an ICT4D initiative, seeks to promote media literacy among Ugandan youth, while the Centre for Media Literacy and Community Development and the DW Akademie have also initiated projects to promote media literacy among the youth and women in Uganda (Reineck & Lublinski, 2015; Nassanga & Rwabu, 2017).

3.2 Social Cohesion

Social cohesion in Uganda has attracted considerable interest among researchers and policy makers. Research studies reveal that social cohesion amongst various communities in Uganda is steadily declining because of factors such as politics, poverty, unemployment, religion and tribal affiliations (IOM, 2017). In addition, there was some fear amongst Ugandans that violence may result from the 2021 elections, due to unresolved tribal issues and lack of electoral reforms (Mugume, 2019). Indeed, 54 people were killed in November 2020 during election protests (Amnesty International, 2020). These continued fears and the most recent electoral violence demonstrate how volatile the status of social cohesion in Uganda is at this moment. In efforts to promote social cohesion in Uganda, media campaigns and radio talk shows have been utilized to mitigate and address potential conflicts (World Vision, 2018).

3.3 Trust and Credibility

Trust in the media is built on the demonstration by journalists and media houses that they are committed to serving the public interest and are inspired by “good faith” and “integrity” in getting the story on behalf of the public (Gibbons, 2013, p. 210). In Uganda, citizens tend to have more trust in the private NMOs than the government media organisations (Nassanga & Tayeebwa, 2018), which is not unique to Uganda (Moehler & Singh, 2011). Generally, the media and journalists in Uganda are perceived to be corrupt, particularly as journalists, it is argued, are poorly remunerated, which has made them susceptible to bribes, leading to low levels of trust and confidence in the media (Nassanga & Tayeebwa, 2018). The National Governance Peace and Security survey revealed that between the year 2013 and 2017, the trust in state media by Ugandan citizens decreased from 57 percent to 40 percent (Uganda Bureau of Statistics, 2017), which reflects a continuous decline in trust in government media organisations worldwide. The blatant refusal by the state media to host opposition politicians and activists for fear that they will reach the public with anti-government sentiments, as well as the skewed reporting focused on pushing the government agenda while muting criticism on the government (Sekyewa, 2013) could explain why Ugandan citizens have more trust in private media organisations.

The rise of misinformation and disinformation has also contributed to the loss of trust and credibility

of media houses in Uganda. According to Sekyewa (2018) NMOs in Uganda, in their attempt to beat competition and break news, have often published stories that lack credibility. He however also notes that increasingly NMOs seek to earn and keep the trust of their audiences through cross checking their facts and sources of information. An analysis of selected Ugandan news stories reveals the danger of face value reporting which leaves audiences with unanswered questions and doubts, ultimately affecting media credibility (Seaman, 2018). In the wake of what Sekyewa (2018) describes as a scramble for stories and the pressure to beat competitors, there are a number of media development and international organisations such as Africa Check and UNESCO that are giving support and training on fact checking to build trust in NMOs.



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Nanfuka (2019) notes that even though social media and other digital platforms like blogs and digital native news sites have emerged as robust platforms for citizen participation, the introduction of the daily social media tax of \$0.05 has limited citizens' participation on these platforms.



3.4 Participation

The use of social media, digital platforms and customised citizen participation and reporting platforms have been critical in citizen participation and engagement with the media in Uganda. These approaches, especially citizen reporting, have mainstreamed marginalised and rural voices into the public discourse. However, Nanfuka (2019) notes that even though social media and other digital platforms like blogs and digital native news sites have emerged as robust platforms for citizen participation, the introduction of the daily social media tax of \$0.05 has limited citizens' participation on these platforms. CPJ (2020) also notes that intimidation of journalists and media houses that host or represent opposition figures and their views has created a culture of fear and limited robust citizen participation on both social media and legacy platforms.

Though the media are still the most important platform for citizens to amplify their voice, they have been underutilized by Ugandan citizens. Fiedler and Meyen (2016) found that many citizens shied

from participating in call-in programmes, though men were more likely to participate than women. To strengthen civic engagement, therefore, several media development organisations are active on the media landscape. The DW Akademie has, for instance, initiated projects targeting youth and women so as to promote participation in civic debates. The projects focus on building capacity of the youth especially those in the rural areas on how to voice their concerns on radio programmes and online platforms, in addition to supporting projects that seek to increase women's participation in online discussions (DW-Akademie, 2019).

CEMCOD and Uganda Radio Network (URN), both in collaboration with DW Akademie, have in the last years also worked to build the capacity of citizen reporters in rural areas to generate media content that reflects their concerns, to allow them to participate in the broader social dialogue. Some citizen reporters have been trained and use an Android app known as i-Alert, which allows them to "send audio, pictures and texts to report on issues that are of concern to their communities" to an internet platform hosted by URN (DW Akademie,

2016 para 5). Radio stations that are part of the URN network then pick up stories of interest, verify facts and further develop the stories for publishing. These citizen reporters' stories have given hitherto unheard communities the platforms to articulate their local issues which sometimes get national prominence through URN depending on the nature of issues. Generally, citizen journalists' coverage of relatable challenges experienced by ordinary Ugandans journalists has generated debates and led to changes in the public sphere as locals are increasingly given the opportunities to take part in public dialogues (DW Akademie, 2016).

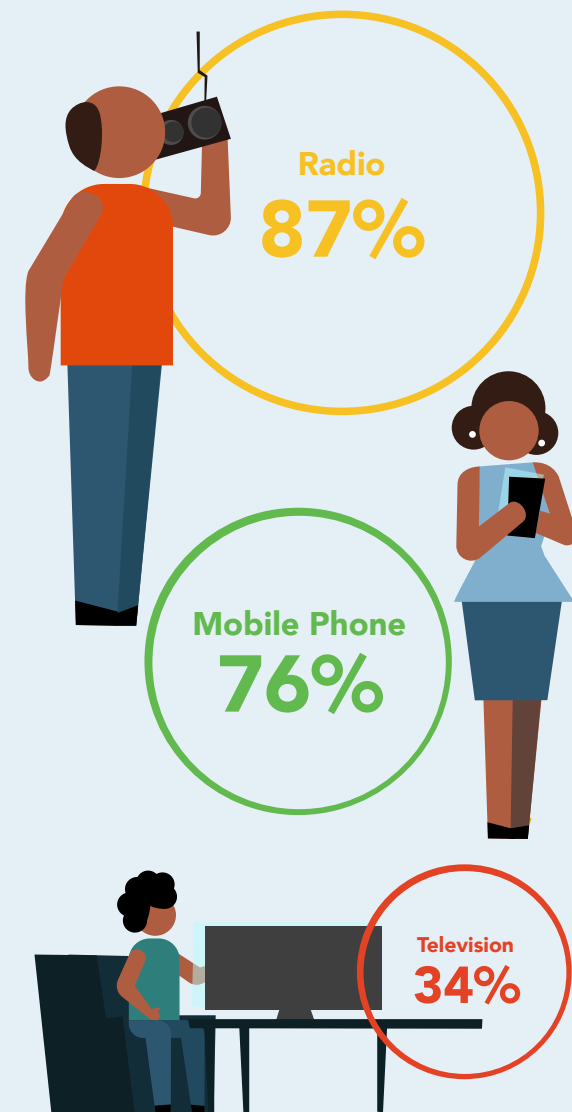
Grameen Foundation was also involved in a citizen journalism project known as Community Knowledge Worker (CKW) 2010. This project saw volunteer CKWs generate local and national interest stories in mostly the rural areas. These stories were then shared and aired by both local and national radio stations (Conte, 2010), a situation that has over the years enhanced citizen participation in local public interest issues and engagement with the media.

3.5 Audience Data

The majority of Ugandans, both in the urban and rural areas, rely on radio to access information while television viewing is more prevalent in the urban areas (BBC Media Action, 2019). According to a National IT survey conducted in 2017/18, three out of five households reported owning a radio compared to only one out of five who reported owning a television; with 52.1 percent of the individuals in the urban areas indicating they watched television compared to 33.9 percent of the individuals based in the rural areas (NITA-Uganda, 2018). Similarly, the BBC Uganda Media Landscape report indicated that radio was the medium owned by most, with 87 percent owning a radio, 74 percent owning a mobile phone, and 34 percent owning a television (BBC Media Action, 2019). While Internet World Stats (2020) indicates that Uganda has an internet penetration of 39.30 percent, only 13 percent have access to the internet within their household.

The Uganda media audience measurement report by Geopoll conducted in 2019 revealed that Luganda programs attract larger audiences compared to English programs (Geopoll, 2019). The measurement report compared Luganda news and English news broadcast on local television stations and Luganda and English programs aired on local radio stations. NTV Uganda and NBS were the most popular stations with English audiences for news and talk shows, while Bukedde TV was popular with the Luganda audiences (Kikonyogo, 2019). Media audience data are mostly available from firms that work internationally or regionally, such as, BBC, IPSOS and Geopoll, which tend to focus on the leading players in the national media landscape. This suggests that reliable audience data that give a granular picture of the audience and their consumption habits at a micro level are often less easily accessible or expensive for smaller media outlets.

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4.0 Technology

The viability of news media depends on technology at many different levels. In order to operate and produce news content, news media organizations must have reliable and affordable access to such basic inputs as: electricity, content production technologies such as computers, cameras, audio gear, and paper; distribution technologies such as broadcast towers and printing presses; transportation networks for physical delivery, and reliable broadband for internet connection. News organizations also must have access to an affordable labour force of technology experts, who are trained to maintain and optimize the organization's critical equipment. Equally important is that consumers have access to affordable technologies for content reception – television sets, radio receivers, news kiosks or home delivery, computers, internet connection, and mobile digital devices such as phones, with affordable data rates. Audiences also need the assurance that privacy and personal data, as they access digital news content, are protected.

4.1 Production and Distribution Resources

NMOs in Uganda generally have affordable access to the basic materials, infrastructure, and technologies they need to produce news. The country's internet penetration of 39.30 percent (World Internet Statistics, 2020), mainly accessed by mobile users (UCC, 2020), is an indicator that the infrastructure is growing to support digital distribution of news content, especially to the urban consumers.

Even though community radios have embraced internet technologies, the high cost of access and utilisation of the internet, especially in the rural areas of Uganda, as well as other challenges like unreliable electricity supply present a gap in the use of digital technologies and resultantly speed of information transmission (The Unwanted Witness Uganda, 2014). HRNJ-Uganda (2015) also noted

that journalists lack basic tools of trade such as computers, voice recorders and cameras.

To grow both their production and distribution capacity, media houses in Uganda need to embrace technology and integrate the latest technology in their systems to remain viable in the evolving digital environment. According to Eva Georgia, a media development consultant (as cited in Kiiza, 2019), Ugandan media organisations need to blend traditional media with the ever-advancing technology to fully succeed in their roles of disseminating information. In addition, they should encourage networking with other media houses as opposed to operating independently. Nassanga and Tayeebwa (2018), emphasise the need for media houses in Uganda to increase the investment and budgetary allocations to Information and Communications Technology (ICT) resources, as basic equipment for journalists such as computers do not suffice in the current digital dispensation.

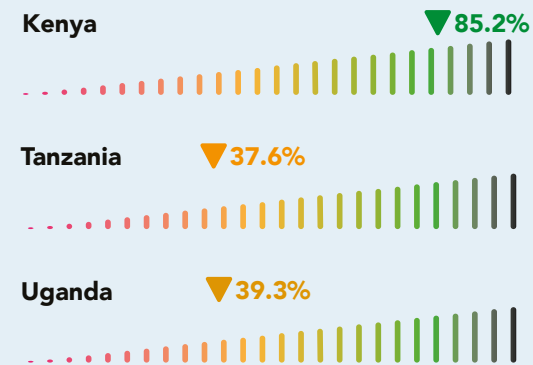


Figure 7: Internet Penetration (World Internet Stats, 2020)



Even though NMOs have access to modern technical facilities and a coherent ICT policy, spectrum allocation is characterised by political influence occasioned by the powers the Uganda Communications Commission Act (2013) has vested in the UCC (Nassanga, & Tayeewa 2018).

4.2 News Media Organisation Access to Technology

Policy makers have argued that policies on access to technology are important, noting that when media actors have increased access to technology, the attendant increase in pluralism and openness makes it much harder for the government to muzzle the press (Taremw, 2019). An assessment of media development in Uganda indicates that even though NMOs have access to modern technical facilities and a coherent ICT policy, spectrum allocation is characterised by political influence occasioned by the powers the Uganda Communications Commission Act (2013) has vested in the UCC (Nassanga, & Tayeewa 2018). According to

Nassanga and Tayeewa “the general perception is that politicians aligned to the ruling government have an easier access to broadcast spectrum licenses than those from the opposition” (2018, p. 56).

To a large extent therefore, access to technology is not a problem for most media houses that are politically aligned or at least do not go against the government and the political elites. Important to note is the fact that the government has control of the use of technology, especially ICT and electromagnetic spectrum. During the 2016 presidential elections for instance, the government through the UCC shut down the internet throughout the voting period. Social media networks such as WhatsApp, Facebook, and Twitter were shut down until February 21st (Chapter four Uganda, 2016). During and after the 2021 elections, the government also shut down the internet for nearly a month between January and February 10, 2021 as ordered by the UCC. The shutdown was partially lifted; however, social media sites like Facebook remained restricted even after the elections (Bwire, 2021).

Instances of the government shutting down internet platforms and frustrating free flow of information and freedom of both the media and of expression abound in Uganda. In February 2006, Uganda’s communications regulator instructed ISPs to block access to www.RadioKatwe.com, because the website was allegedly publishing “malicious and false information against the ruling party National

Resistance Movement (NRM) and its presidential candidate” (CIPESA, 2013). More recently, in February 2019, the regulator ordered the Daily Monitor newspaper to shut down its website, saying that the newspaper had failed to comply with a 2018 directive which required all online media to seek permission from UCC to operate (Freedom House, 2020).

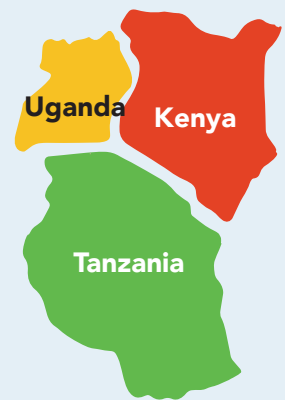
Kakungulu-Mayambala (2019) aptly noted that the government is using both old and new laws to crush any activism on the digital platform and to a large extent access to technology by the media or other public sphere actors does not necessarily mean a robust democratic discussion of public interest issues in Uganda. Critics argue that the political climate in Uganda has occasioned a media landscape that is fairly independent in its enterprise for as long as it does not antagonise the establishment (Nassanga, & Tayeewa 2018).

In April 2018, the communications regulator, UCC, directed online data communication service providers, including online publishers, online news platforms and online radio and television operators to apply for authorisation from the commission within a period of one month or risk having their websites and/or streams being blocked by internet service providers (UCC, 2018). Similarly, on December 10, 2020, the Media Council of Uganda issued similar orders through a press release, addressed to all journalists in Uganda. The Council’s directive was to the effect that those not accredited after registration

would not be allowed to cover the elections, a move that was challenged in court by the Editors Guild of Uganda and rejected by the industry (MCU, 2020).

The Ugandan online space is relatively highly regulated, with online media required to adhere to stringent regulations that include extensive disclosure of their shareholding and financial structure (*Allafrica.com*, 2020). However, the advent of digital technology has seen legacy media houses expand to online platforms and like in many other media markets, legacy NMOs are grappling with strategies to monetise their online content.

In a nutshell, even with provisions for equitable technology access to all the NMOs and the expansion of the digital infrastructure; there are indications that the both the policy and the liberal approach to provision of access to technology, especially electromagnetic spectrum and ICT represent a political resource in Uganda.



Weighted Price of Internet Bandwidth (\$/Mbit/s per month)

Nairobi	5.25
Kampala	10.00
Dar es Salaam	15.50

4.3 Audience’s Access to Technology

The country has, in the last few years, experienced an exponential increase in access and use of ICT, especially the internet. Uganda has an estimated 18.5 million internet users. The growth in internet access to 39.3 percent for a population of 47,123,531 (Internet World Stats, 2020) has been attributed to the increase in mobile phone penetration which stood at 25.6 million subscribers, with 15.2 million accessing the internet through their mobile phones as at September 2019 (UCC, 2020).

However, although internet access has become more affordable, particularly on mobile phones, the cost of the internet is still high for many Ugandans (Freedom House 2019). The introduction of a daily UGX 200 (\$0.05) tax on social media use in July 2018 has exacerbated the expense of access and may effectively “push basic connectivity out of reach for millions” (Alliance for Affordable Internet, 2018), especially those in rural areas and the urban poor.

International Bandwidth by Country (Mbit/s) 2019

930,576
224,627
292816

CAGR

39%
44%
28%

4.4 Digital Expertise

As technological innovations in the media industry push forward, journalists have to keep abreast with the skills needed to operate the equipment for quality news production. Training journalists to enable them to navigate the digital space effectively has therefore become necessary and a continuous endeavour in the evolving digital world (Maria, 2018).

Five years ago, at least 40 percent of Ugandan journalists were accessing the internet through cyber cafes and shared computers. They did not have the skills or software to anonymously navigate cyber space while using shared computers (HRNJ-Uganda, 2015). Today a number of organisations offer training which provide journalists with digital safety skills, critical in building capacity to handle the inherent risks such as fake online sources, malware, fake websites and malicious phishing emails (Sekyewa, 2018). The Hub for Investigative Media (HIM) based in Kampala offers training programmes to journalists in fact checking and digital security issues. Other organisations like Africa Centre for Media Excellence (ACME) and Media Challenge Initiative (MCI) in their work on good storytelling and supporting journalism excellence, are also working to equip journalists with the skills they need in the evolving digital world.

Figure 8: Weighted Prices for internet bandwidth (Telegeography 2019b as cited in Trade and Investment Global Practice, Africa Region, 2020)

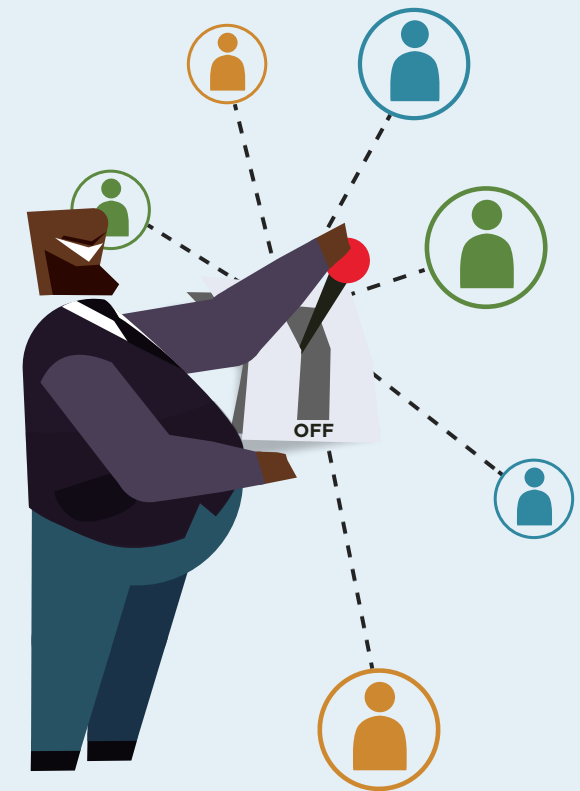
4.5 Citizens Digital Rights

Citizens' digital rights have continued to decline in Uganda as the government has increasingly used different approaches, aided in part by retrogressive provisions of the laws, and unilateral actions, including internet shutdowns (Chapter Four Uganda, 2016). In February 2016, the government ordered the shutdown of the internet on the eve of the presidential elections voting day, citing "national security" (Chapter Four Uganda, 2016; Global Voices, 2016). National security was again cited when the government shut down the internet during the inauguration of the president in May 2016. A report by the opposition party National Unity Platform (NUP) noted that in January 2021, the government through the UCC ordered the closure of social media platforms, and towards election day and immediately after the elections, went ahead and shut the internet completely, allegedly to prevent citizens from reporting electoral malpractices and abuses (Afran, 2021). The European parliament, in a joint motion for a resolution on the political situation in Uganda issued on February 10, 2021, noted that security forces were disrupting opposition rallies and limiting coverage of the elections. The resolution called for an end to: shutdown of the internet, obstruction of access to social media platforms and the repression and disproportionate limiting of gatherings (European Parliament, 2021). These restrictions by the Ugandan government not only infringed on the citizens' digital rights, but

also made it hard for the citizens to report electoral injustices or gather to express displeasure with the outcome of the elections.

In May 2018, the government passed an amendment to the Excise Duty Act, introducing a mandatory tax of UGX 200 (USD 0.05) per user per day for access to Over-the-top (OTT) media services such as WhatsApp and Telegram and social media services such as Facebook and Twitter, effectively curtailing citizens' access to the internet and thereby information. Taxation has been used as a part of an omnibus legislative measure and the intent is not necessarily to generate revenues but to curtail citizen access to the internet, consequently limiting the robust conversations by Ugandans on these platforms (Nanfuka, 2019). In a letter to the Finance Minister in March 2018, President Museveni wrote that the taxes were necessary as the country needed resources to cope with the consequences of "olugambo" (gossip) on social media (Mugerwa & Malaba, 2018).

These measures by the government seem to speak of a legislative framework aimed at limiting civic participation and democratic discourse. The social media tax, the frequent shutdowns during elections and the government's penchant to control access to information not only denies Ugandans universal access to information, but also limits consumption of media content, thereby limiting advertising spend and certainly limits the voices that contend in Uganda's democracy (Maractho, 2020).



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5.0 Content

The quality of content available to a nation's citizens is a defining element in news media viability because, if a country's media system is producing only low-quality, sensational or entertainment content, highly censored information, or disinformation, then the survival of the news media industry ceases to be a matter of much importance to society.

Content quality refers to whether news media in a country are providing audiences with accurate and timely information about important, relevant events and issues at the national, international and local levels. News and information should be available, factual, and uncoloured by partisan political, ethnic or religious considerations. Audiences should have access to information that is provided in their own languages, and that accurately and fairly covers and represents people who are part of minority and marginalized groups in society.

Multiple conditions in news industries affect the quality of content that reaches the public. Among them are the availability of skilled journalists, coupled with industry pay rates that attract and retain talented professionals and discourages unethical behaviour; media ownership that is transparent, not overly concentrated, and committed to high quality, independent journalism; financial resources sufficient to support the production of quality news content, and a staff that reflects the diversity of society.

5.1 Content Quality

There are public concerns about media content, especially with regard to content that helps focus citizens on serious issues in the country. The broadcast industry, especially private/commercial radio, is criticised for largely focusing on entertainment rather than news and public affairs content (Lugalambi, Mwesige, & Bussiek, 2010). Foreign content also dominates Ugandan TV programming, while entertainment-themed content leads in most broadcast media. However, the leading TV stations such as NTV, NBS and UBC have been credited for giving serious attention to news and having rich broadcast content during peak viewing hours (Lugalambi, Mwesige, & Bussiek, 2010).

The focus on entertainment may also be motivated by an attempt to protect broadcast stations against harassment by the government, through the UCC, the regulator. In mid-2019, the UCC ordered the suspension of all broadcast editors who had allowed news about an opposition politician's press conference to be aired under the nebulous excuse that some circles in security had complained to the regulator (Kakah, 2019). The UCC was sued over this directive and in May 2019, the Uganda High Court ruled against the UCC (The East African, 2019).

Financial instability, especially in smaller media houses in Uganda, has made them vulnerable to corruption and intimidation, which in turn affects their operations. In other instances, the

media owners' inclination to support profit making endeavours at the expense of public service journalism has curtailed the practice of independent journalism, which ultimately affects the quality of content and production (Pekkonen, 2018). In a positive development, broadcasting in local languages has experienced significant growth across the broadcast spectrum as most media owners acknowledge the need to be relevant to local audiences (Chibita, 2016). News and locally relevant information are thus more easily accessible across the country.

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5.2 Journalism Expertise

Most broadcast media organisations in Uganda opt to employ professionals who are not necessarily journalists, but qualified personnel to concentrate on music that attracts high audience numbers. This requires less investment compared to news production, making it more profitable for these stations (HRNJ-Uganda, 2012). The Ministry of Information, Communication and Technology and National Guidance (MoICT & NG) in Uganda has urged media owners to engage professional journalists in their newsrooms who can add value to the media audiences (Otago, 2019). This is in view of the fact that there are many trained journalists who are unemployed. A spot check of all the universities in Uganda shows that more than ten universities offer journalism training at the bachelor's level. This study also established that four universities offer journalism, media studies and communication courses at postgraduate level; they include: Makerere university, Bishop Stuart University, Uganda Christian University and Kampala International University.

Tangen Jr (2020) notes that Uganda produces far more university graduates than the job market can absorb and that journalism graduates face two key challenges: first, is the challenge of learning too much theory with little practical experience. Second, is the industry's reluctance to employ these graduates because they lack practical experience, a situation that does not help these graduates

acquire professional skills through traineeship and internships. Different organisations like Media Challenge Initiative (MCI) have come in to bridge the gap through training, mentorship and experiential peer-to-peer learning.

Gender representation in the media industry in Uganda is skewed with more men than women involved. Uganda Media Women's Association (UMWA, 2014) reported that only 20 percent of women journalists in Uganda contribute to print media news, which is often soft news in areas such as entertainment, arts or relationships rather than hard news such as politics, defence or economics. Global Voices (2020) also reported that women journalists



have stopped reporting stories critical of the government due to fear of attacks and harassment, which could further explain the low number of women in Uganda covering hard news stories. Women's participation is even lower in public affairs programming on broadcast media, where Maractho (2018) found that on average, only 14 percent of women were involved as guests and subjects in talk shows on radio and television in 2015.

Rural-based radio and television stations also suffer shortage of professional media practitioners (HRNJ-Uganda, 2015). HRNJ-Uganda also observed that most NMOs do not offer competitive salary packages, which has seen them opt to employ more diploma holders than degree holders, since the latter's pay demands are higher. This has denied media organisations of experienced and well-trained human resources to manage the business end of journalism. Additionally, Kazibwe (2018) argued that poor remuneration in the media industry contributes to high turnover of Ugandan journalists who prefer to work with government agencies as information officers and with corporate organisations as public relation officers.

However, even with experience and professional competence, the expertise of journalists in Uganda is severely tested by the political environment that has pushed journalists to self-censorship as a way of ensuring their personal security in the media landscape (Cohen & McIntyre, 2020).

5.3 News Media Ownership

Media ownership is seen to directly impact media content in Uganda, with media owners influencing major decisions made in the newsrooms (Kazibwe, 2018). Additionally, it is estimated that more than 70 percent of radio stations are owned by businessmen and politicians, some allied to the ruling NRM government. As a result, these owners tend to prohibit any news content about opposition politicians and rarely allow them to appear on radio talk shows, especially during electoral campaigns (Myers & Harford, 2020).

There are two dominant players on the Ugandan media scene - Nation Media Group (NMG) and Vision Group - the latter a commercial enterprise owned by the government. Both NMG and Vision Group seem to be operating in a media ecosystem where interests of the corporate world and the political class take precedence over the critical and normative functions of journalism in a democracy (Wasserman & Benequista, 2017; Nyamjoh 2012; Nyamjoh, 2005). These two media houses own the leading news outlets in both print and broadcast (Cohen, 2020). In print for instance, government-owned The New Vision is Uganda's leading newspaper in circulation at about 30,000 copies per day followed by NMG's Monitor (Cohen).

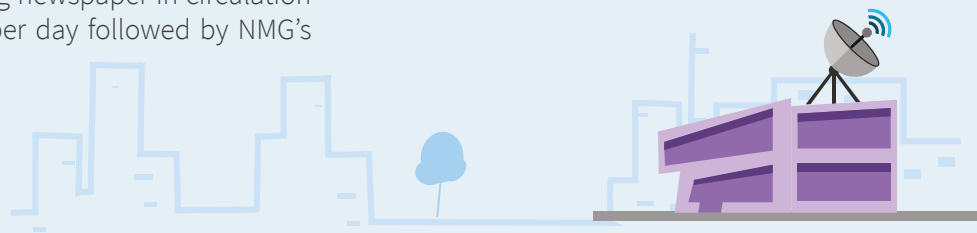
The media system in Uganda is also characterized by a cross-media ownership model with the big NMOs controlling print, broadcast and the digital platforms. Uganda Broadcasting Corporation (UBC) and Nile Broadcasting Services (NBS) own both TV and radio news outlets while NMG and Vision Group dominate both broadcast and print. Critics argue that concentrated ownership affects media viability as media owners tend to adopt a higher proclivity to the bottom line at the expense of watchdog and public interest journalism (Horwitz, 2005; Curran, 2000; Prat & Strömberg, 2013). However, others have also argued that conglomeration and concentration of media ownership play a big role in preserving media outlets threatened with closure and in most cases offer media establishments the capability to confront international competition (von Dohnanyi & Möller, 2003; Hrvatin & Petković, 2004). Moreover, while the discourse on the independence of smaller and medium size stand-alone NMOs is fairly inconclusive, the desirable effects of concentration and conglomeration when safeguarded by editorial

independence guarantee diversity of information and freedom of the press (Hrvatin & Petković, 2004).

In Uganda the ownership seems to be either supportive of the regime, in the case of the national broadcaster, UBC, and the government owned Vision Group conglomerate, or more focused on the bottom line for the case of commercial media organisations. Both the focus on supporting the regime and on the bottom line, influence the editorial decisions of these big NMOs in Uganda. Critics have argued that the success of some of these big NMOs can be attributed to editorial slants that are either supportive of the government agenda at worst, or muted on criticism of the ruling NRM at best.

Uganda further presents an interesting ownership scenario with the two old Kingdoms of Busoga and Buganda owning Busoga Baihno (BABA) TV and Buganda Broadcasting Service (BBS) TV respectively (Kazibwe, 2018). These two stations play roles in promoting cultural, economic and political interests in the respective kingdoms and BBS unlike BABA,

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though predominantly owned by the Baganda kingdom also draws some shareholders from business people, heads of clans and prominent administrators within the kingdom (Kazibwe, 2018).

In a nutshell, the ownership of the media has a close relationship with political power or aligns itself to political power to remain both in the business of informing the public and attaining commercial goals. Since the powerful political class use the media for political expediency, media owners seem to be straddling the middle ground of using their media to promote and disseminate political views that do not antagonise the political class and exploiting political goodwill to pursue their own commercial interests.



5.4 News Media organisations' Business Structures and Competencies

The survival of many media organisations globally is pegged on advertising revenues and this is no different in the Ugandan media scene. This traditional business model is the dominant business model and has largely been boosted by government and big corporates' advertising revenue. However, in 2011 the government cut its advertising budget by half, forcing media organisations to rethink their models to enhance their survival chances (Wasswa, 2011). However, almost a decade later, NMOs are still largely reliant on advertising revenues that have continued to decline. Kyamutetera (2019) notes that Ugandan newspapers are operating on an advertising revenue model instead of a circulation revenue model, a situation that is likely to challenge their operations unless they diversify revenue models. Similarly, Tumusiime, (2016) observes that advertising in a majority of the media organisations

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is on the decline, noting that print media revenue dropped from 21 percent in 2010 to 17 percent in 2015, while radio dropped from 60 percent to 58 percent in the same period. There are no data to show that this trend has changed.

With the digital revolution also complicating the already revenue-challenged media environment, the media organisations in Uganda, just like in Kenya and Tanzania, are currently grappling with revenue generation on the digital platforms. These revenue struggles are further exacerbated by the revenue competition by tech giants like Facebook and Google that have developed deep global capabilities (Chalaby & Plunkett, 2020) and the entry of digital news media outlets and bloggers who are increasingly staking a claim in the advertising market. The non-profit journalism approach has thrived in Uganda to counter the challenges of a market-led journalism approach, though the former is reliant on donor support (Tumusiime, 2016). The profit led approach on other hand has seen the rise of tabloidization (Nassanga, & Tayeebwa, 2018).

5.5 Business Expertise

Tangen Jr (2020) notes that many journalism graduates in Uganda lack practical experience, and that the industry does not provide for apprenticeship to marry the theoretical knowledge from school and the practical journalistic and journalism business skills. This is despite the fact that internship opportunities are not only a requisite, but also examined in the course of journalistic training programmes in all journalism schools in Uganda. In Uganda's political economy that is characterised by "dwindling newspaper circulation and advertising figures and the rise of digital media" (Tumusiime, 2016, p. 4) and a high rate of journalism staff turnover, the industry has over time suffered a dearth of experts to run the industry. The drive to extract more from the shrinking advertising cake has led to the drift toward market driven journalism, a situation that Tumusiime (2016) notes is not anchored on the conviction that news is a public good. This market driven approach has pushed media business experts and Ugandan media managers to editorial business alliances where news coverage is characterised by sensationalism, infotainment and celebrity stories.

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Conclusion

Uganda's news media face many of the challenges that threaten the viability of news organisations around the world, and some additional issues that are more national in scope. Examination of structural and societal conditions in the country known to influence news media viability suggest that overall trends were not favourable in 2020. Thus, Uganda's news media organisations (NMOs) are likely to face increased obstacles in producing high-quality journalism from external factors such as political, economic and social conditions in the near term.

As is true in nations around the world, the viability of Uganda's news media is threatened by the fragmentation of audiences, advertisers and other sources of revenue across a rapidly expanding set of information sources, and exacerbated by advances in digital technologies, which has brought more competition for both audiences' attention, and advertisers', subscribers', donors' revenue and government subsidies. In Uganda, these economic challenges have occurred in a relatively small economy that is confronted by high rates of poverty. The global economic disruption caused by the Covid-19 pandemic has also placed additional pressures on Uganda's news media.

The country's NMOs operate in a political, regulatory, and legal environment that provides structural guarantees to media freedom. In recent years however, NMOs have been subjected to significant restrictions on access to information and the ability

to report freely, including direct threats on individual journalists. Thus, there has been a trend towards greater constriction of journalistic action, despite the increase in the number of information sources in the country.

Uganda's social cohesion has been declining in recent years, according to researchers working in the country, and media literacy among the population is generally low. There are also important differences in information access, based on rural-urban divides. These differences, combined with growing government pressure on journalists and the mounting of cases of disinformation from information sources, are increasingly contributing to the public's distrust of NMOs.

A bright spot in the trends affecting news media viability in Uganda is steady improvement in the country's ICT infrastructure, which is providing improved access to information. Challenges remain in the form of regressive taxation policies and government interference with the internet for political reasons. Nor can it be ignored that digital technologies are a double-edged sword for news media viability. They are critically necessary for news production and distribution and public access to news, but their proliferation is also the source of hyper-competition for audiences, advertising and other sources of revenue that is one of, if not the primary challenge, to news media viability in the first place.

Not surprisingly, given the structural challenges in the environment in which Uganda's news media operate, many media experts question the quality of news content produced by the country's news media. While some of the content problems identified are grounded in political interference, others reflect organisational-level, economically motivated prioritisation of entertainment content. News media ownership concentration in the country is high, which is particularly problematic because observers argue that it is common for powerful Ugandan media owners to directly interfere in editorial decisions. Finally, the level of qualifications and diversity of newsroom staff remains low, which is a negative indicator for content quality.

Understanding trends in the larger environment in which Ugandan news media operate is critical to helping policy makers, industry leaders and journalists identify places where policy changes can support improved news media viability. A strong, vibrant, independent news industry that focuses on serving as a public watchdog on government, businesses and the society has long been recognized as a key contributor to a strong democracy, economic growth, and a society in which both individual and collective rights are valued. This report offers a small contribution to that effort.

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