March 2021

Media Viability in East Africa: Tanzania

Media Futures East Africa

Supported by

THE AGA KHAN UNIVERSITY

DW Akademie

KFW Bank aus Verantwortung

german cooperation
DEUTSCHE ZUSAMMENARBEIT

© Aga Khan University, Graduate School of Media and Communications

Prepared by:

Joyce Bazira, Abdallah Katunzi, Rose Kimani, Hesbon Hansen Owilla and Njeri Wanjiru

Edited by:

George Gathigi and Ann Hollifield

Reviewers:

George Mutalemwa and Julia Wegner

In the context of:

The Media Futures EA Project

Implemented through:

Aga Khan University - Graduate School of Media & Communication (AKU GSMC)

DW Akademie

Supported by:

Kreditanstalt für Wiederaufbau (KFW)

Bundesministerium für wirtschaftliche Zusammenarbeit & Entwicklung (BMZ)

Recommended citation:

Media Innovation Centre. (2021). Media Viability in Tanzania. Graduate School of Media and Communications, Aga Khan University and DW Akademie.

*The order of researchers who prepared this report is alphabetical

Executive Summary

The media landscape in Tanzania is diverse and vibrant. This diversity as of March, 2020 included 183 radio stations, 43 TV stations, 229 newspapers and magazines in mainland Tanzania (Katunzi & Spurk, 2020) and 22 blogs and online news sites. In recent times, internet penetration has grown to 37.60 percent in the country (Internet World Stats, 2020), further diversifying information sources in the country.

This national level media viability analysis of the Tanzanian 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. The economic indicators analyse national economy, financial stability of News Media Organisations (NMOs), financial independence of NMOs, competition, and audience demand for quality journalism. 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.

Politics continues to play a major role in Tanzania's media dynamics. In the period of the fifth president (2015-2021), the late John Pombe Magufuli, there were increased incidences of the government banning or suspending newspapers and radio stations, as well as raiding or fining NMOs for publishing or broadcasting content deemed critical of the government (MCT, 2019a). Authorities have also passed new legislations and enforced existing laws that repress independent reporting and restrict the work of media, civil society and political opposition groups. As a result, freedom of expression and of media in Tanzania declined sharply in the same period. This has affected public discourse, as members of the public no longer air their political views freely, avoid political discussions altogether, and instead, prefer to discuss less controversial topics such as sports. The media too has not been spared as the state uses national security to rein in on critical reporting by the media (Katunzi & Spurk, 2020).

The legal regime has fairly restrictive laws including fairly restrictive and punitive legislative frameworks on the cyber spaces and laws that cap foreign media ownership at 49 percent. Further the laws limit private and commercial investment in the media, and restricts training directed to media by foreign entities. The Access to Information Act, 2016 has very expansive provisions on access to government and public information, but the implementation has been problematic. Together, these restrictions constrain media plurality, diversity and growth.

NMOs in Tanzania are highly concentrated in urban areas partly due to the dearth of purchasing power among the rural populations. The steep decline in advertising income occasioned by competition from social media platforms and digital advertising channels, including tech giants like Google and Facebook, has also affected the financial performance of most traditional media. The situation has not only led to media houses scaling down their operations but has also compromised their independence and stability. As NMOs' financial

position has weakened, the government has increasingly used its own advertising buys to whip the media into pushing government agenda, a situation that has significantly compromised media independence. Generally, the media is struggling for viability as the low audience demand for quality media does not sufficiently sustain a competitive media ecosystem. The struggle is further heightened by the high investments in production of premium content on the digital platforms and the dearth of monetisation opportunities for such premium content.

The Tanzanian audience has a high literacy level, and is fairly media literate, and majority of Tanzanians perceive the media as an important ally of the state in development matters. Although there is increasing consumption of content from digital sources, traditional media continue to be an important part of the citizens' lives, and audience data indicate that Tanzanians consume news content mostly from print media, radio and television outlets (Katunzi & Spurk, 2020). Audiences, especially those in rural areas, view the media as an entity tasked with promoting unity and cohesion. They credit the media with supporting government policies, including facilitating literacy campaigns and discussions on social issues such as health and elections. However, the level of trust in the media is on a decline, with the public having notably less trust in social media sources than in traditional sources of news content.

An examination of the ways in which Tanzania's media sector interacts with technology reveals that technological resources are inadequate and beyond the reach of most NMOs. There are also factors such as skills gaps, low internet penetration in rural areas, limited access to digital devices and low awareness regarding the benefits resulting from technology use (Spurk & Katunzi, 2019).

Finally, the socioeconomic and political conditions and media capture in Tanzania influence media content, journalistic quality and robust public engagement (Powell, 2017). The quality of content is further affected by the capacity of journalist, media houses reliance on fewer sources and news media content characterised by fewer viewpoints (Katunzi & Spurk, 2020). Going forward, the financial challenges exacerbated by the COVID-19 pandemic and the attendant impact on the quality of content will be major issues of concern as media houses work around the new political dispensation in Tanzania.

Table of Contents

Executive Summary iii
List of Abbreviations vi
List of Figures vii

Overview: The Media Industry in Tanzania 1

Methodology 2

1.0 Politics 3
1.1 The state of rule of law in Tanzania 4
1.2 Freedom of Expression 5
1.3 Access to Information 7
1.4 Legal Equality 8

2.0 Economics 11
2.1 National Economy 12
2.2 Financial Stability of News Media Organisations 12
2.3 Financial Independence of News Media Organisations 13
2.4 Competition 14
2.5 Audience demand and quality of journalism 14

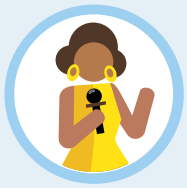
3.0 Community 16
3.1 Citizen education 16
3.2 Social cohesion 17
3.3 Trust and credibility 17
3.4 Participation 18
3.5 Audience Data 19

4.0 Technology 20
4.1 Production and distribution resources 20
4.2 News media organisations' access to technologies 21
4.3 Audiences access to digital technology 21
4.4 Digital expertise 21
4.5 Citizens' digital rights 22

5.0 Content 24
5.1 Content quality 24
5.2 Journalism Expertise 25
5.3 News Media Ownership 26
5.4 News Media Organisations' Business Structures and Competencies 27
5.5 Business Expertise 28

Conclusion 29

References 31



List of Abbreviations

AMB	Africa Media Barometer
BRELA	Business Registrations and Licensing Agency
CCM	Chama cha Mapinduzi
CHADEMA	Chama cha Demokrasia na Maendeleo
DIS	Director of Information Services
EPOCA	Economic and Postal Communications Act
FES	Friedrich Ebert Stiftung
ISD	Information Services Department
JET	Journalist`s' Environmental Association
LHRC	Legal and Human Rights Centre
MCL	Mwananchi Communications Limited
MCT	Media Council of Tanzania
MIL	Media and Information Literacy
MISA	Media Institute of Southern Africa
MNH	Muhimbili National Hospital
MVI	Media Viability Indicators
NMO	News Media Organisations
PFVR	Press Freedom Violation Register
RSF	Reporters Sans Frontieres
EAC	East African Community
SADC	Southern African Development Community
TADIO	Tanzania Development Information Organisation
TAMWA	Tanzania Media Women's Association
TCRA	Tanzania Communications Regulatory Authority
TEF	Tanzania Editors Forum
THRDC	Tanzania Human Rights Defenders Coalition
TMF	Tanzania Media Foundation
TPDF	Tanzania People's Defence Force
TSN	Tanzania Standard Newspaper
UDSM	University of Dar es Salaam
UNDP	United Nations Development Programme
UNESCO	United Nations Educational Scientific and Cultural Organisation
UTPC	Union of Tanzania Press Clubs
URT	United Republic of Tanzania
WPFI	World Press Freedom Index

List of Figures

Figure 1: Numbers of newspapers, radio and TV in Tanzania and Zanzibar..... 1

Figure 2: Overall World Justice Project (WJP, 2020) 3

Figure 3: National economy (World Bank, 2019).....11

Figure 4: Literacy Rate (UNESCO, 2020) 16

Internet Penetration (World Internet Stats, 2020).....20

Figure 6: Weighted Prices for internet bandwidth (Telegeography 2019b as cited in Trade and Investment Global Practice, Africa Region, 2020).....21

Overview: The Media Industry in Tanzania

Tanzania is the union between Tanganyika (Tanzania Mainland) and Zanzibar, an island in the Indian Ocean Tanzanian archipelago. While Tanganyika got its independence in 1961, Zanzibar got hers in 1964. On April 26, 1964, the two countries merged to form the United Republic of Tanganyika and Zanzibar, which was later renamed the United Republic of Tanzania in October 1964.

The history of media in Tanzania goes back to 1888 when Msimulizi (The Storyteller) newsletter was established in Zanzibar (Sturmer, 1998). Today, the media landscape in Tanzania is diverse and vibrant with 183 radio stations and 43 TV stations (Katunzi & Spurk, 2020). The print sector is the most diverse in East Africa; Katunzi and Spurk note that there are 229 newspapers and magazines in Tanzania Mainland, 78 percent being privately owned and the rest owned by the government and its parastatals. In Zanzibar, there are 25 radio stations, 12 TV stations and two newspapers (Interview with TCRA officials). Apart from the growth of traditional media, the country is also witnessing growth in internet penetration which now stands at 37.60 percent (World Internet Statistics, 2020). The current research team established that as at March 2020 there were 22 blogs and online news sites in Tanzania.

Digital technologies have expanded the range of sources of information available to Tanzanians, with online multimedia content being the fastest growing source of news. In addition to digital native news organisations, most newspapers, radio stations and TV channels are present online and use social media to reach more people. M-Papers, a digital newsstand, allows members of the public to subscribe to electronic versions of newspapers and magazines.

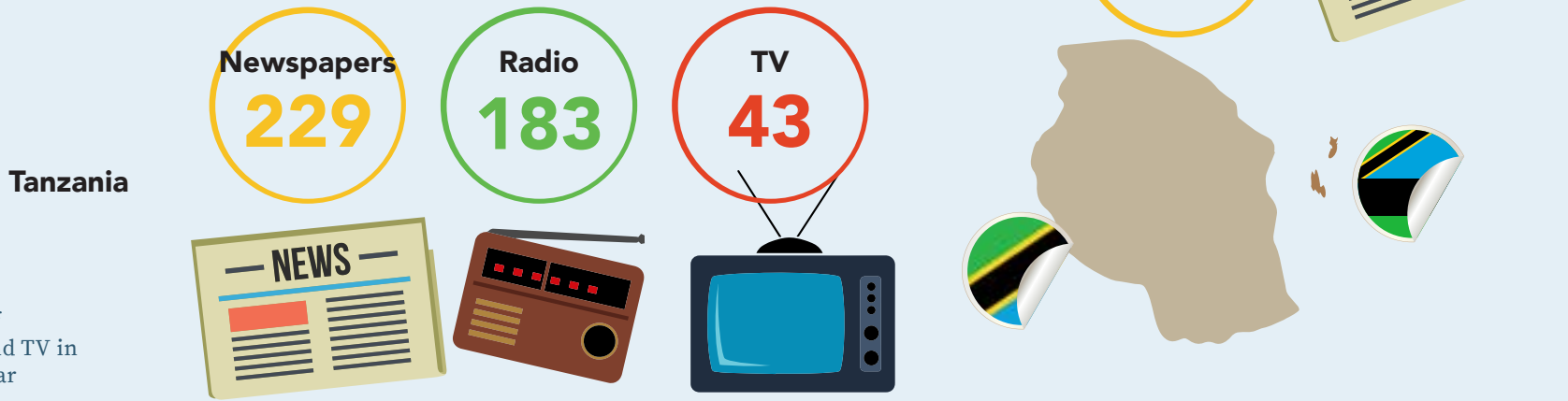


Figure 1: Numbers of newspapers, radio and TV in Tanzania and Zanzibar

Methodology

The goal of this report is to provide an overview of the news media landscape and operating environment in Tanzania. Such an overview provides a foundation for understanding the institutional and structural context in which Tanzanian 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 Tanzania (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 Tanzania 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).

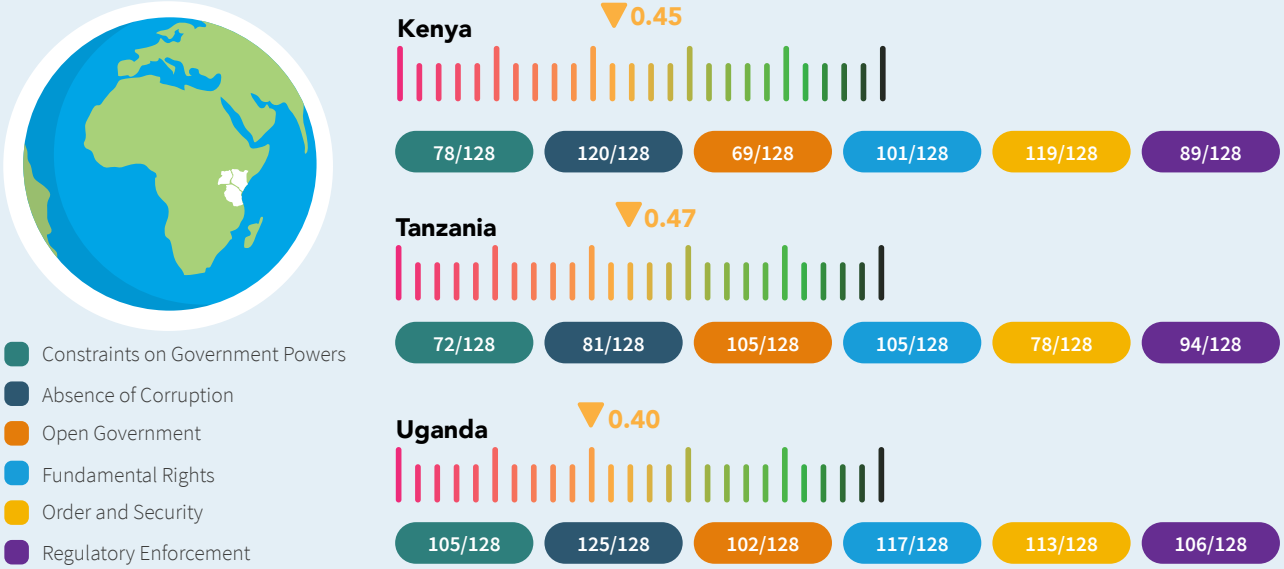
1.0 Politics

News Media Organisations (NMOs) operate within political and regulatory frameworks that have significant impacts on their organisational viability. If they are to perform their watchdog role of informing the citizenry, NMOs 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.

Tanzania has a two-tier political and legal system, with a legislative framework that governs the entire country and a second one that is specific to Zanzibar and mainland Tanzania as separate entities. According to the Legal and Human Rights Centre (LHRC), Tanzania is a multi-party democracy and since the introduction of the system in 1992 (LHRC, 2018), the independence party, Chama Cha Mapinduzi (CCM, in English The Party of the Revolution) has held power, enjoying majority status in the National Assembly.

The right to participate in the political sphere has been constrained in the past few years. In the 2018 Tanzania Human Rights Report, LHRC (2018) noted that there have been arbitrary restrictions on the rights to civic participation, including freedom of expression, freedom of assembly and freedom of association, which have, in turn, affected participation in the political space and contributed to a constrained civic space. The Political Parties (Amendment) Act (2019) has further clawed back on the right to political freedom by giving the registrar of political parties, a government appointee, immense powers over political parties. This powers also include granting the ruling party, CCM, the powers to punish perceived dissident politicians and their political parties.

The constrained civic and political space has not stopped the media and politicians with divergent views from playing a major role in Tanzania's socioeconomic and political scene, and in recent years the relationship between the media and the government has often been adversarial. Since 2015, the Tanzanian government has banned or suspended newspapers and radio stations; raided them or fined them for publishing or broadcasting content deemed critical of the government (MCT, 2019a). The government has also arbitrarily arrested and, in some cases, levelled trumped up charges against journalists, activists, and opposition politicians perceived to be government critics. Authorities have also passed new legislation and enforced existing laws that repress independent reporting and restrict the work of media, nongovernmental organisations and political opposition groups.



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

1.1 The state of rule of law in Tanzania

The rule of law in Tanzania for the past four years can be described as undefined and frustrating. According to the LHRC (2020) report, the situation of freedom of expression continues to slightly deteriorate, owing to the existence and implementation of restrictive laws; bans on, and suspension of media outlets; and arbitrary arrests and/or detention of journalists. The media in Tanzania have also witnessed an increase in rhetorical attacks by the authorities, who have also increased their harassment of opposition parties and human rights defenders. These factors have negatively affected Tanzania's performance in Reporters Without Borders (RSF) World Press Freedom Index 2019; the country dropped 6 places to position 124 in 2020 in the world rankings with a score of 40.25 percent (RSF, 2020).

The World Justice Project (WJP, 2020) gives Tanzania a Rule of Law Index rank of 0.47 on its scale of 0 to 1, where 1 indicates the strongest adherence to the rule of law. Tanzania ranks 93 globally out of 128 countries. The WJP index shows Tanzania ranking 72/128 globally on Constraints on Government Power; 81/128 on Absence of Corruption; 105/128 on Open Government; 105/128 on Fundamental Rights; 78/128 on Order and Security; 94/128 on Regulatory Enforcement; 76/128 on Civil Justice; and 81/128 on Criminal Justice (WJP, 2020).

Restrictive laws that continue to hinder effective realisation of freedom of expression include the Media Services Act of 2016, the Cybercrimes Act of 2015, and the Electronic and Postal Communications (Online Content) Regulations of 2020. The existence and implementation of these laws continue to contribute to a shrinking civic space in Tanzania. Arrests and/or detention of journalists reported in 2019 include that of Erick Kabendera and Joseph Gandye. Tanzania Human Rights Defenders Coalition (THRDC) documented one additional arbitrary arrest reported in the period between January and September 2019 in Legal and Human Right Centre (LHRC, 2020).

Cases of malicious arrests and, in some cases, disappearance of journalists have increased in Tanzania, and it is commonplace for elite government officials to storm media houses and intimidate journalists. Amnesty International notes that the August 2019 arrest of journalist Erick Kabendera was a travesty of justice, as the charges that were levelled against him were politically motivated to stop him from exposing the political divisions within the ruling party (Amnesty International Report, 2019). Joseph Gandye was also arrested in August 2019, ostensibly to stop him from exposing police brutality, while investigative journalist, Azory Gwanda, who went missing in 2017, is yet to be found. The Government of Tanzania seems to be unbothered about the whereabouts of Gwanda, who was exposing gang killings (Ng'wanakilala, 2019).

NMOs, private companies and individuals in Tanzania are regulated on the digital sphere and the law stipulates the extent of digital liability and rights. The Government, through TCRA passed The Electronic and Postal Communications (Online Content) Regulations 2018, later amended to Electronic and Postal Communications (Online Content) Regulations, 2020 with the view to regulating online content. The regulation states that social media users are responsible and accountable for the information they publish on social media, while bloggers and internet forums are also accountable for the content on their websites. Content providers, by law, are now required to have mechanisms in place to identify sources of their content and, when needed, to cooperate with the authorities to identify users' identities.

Cases of malicious arrests and, in some cases, disappearance of journalists have increased in Tanzania, and it is commonplace for elite government officials to storm media houses and intimidate journalists.

1.2 Freedom of Expression

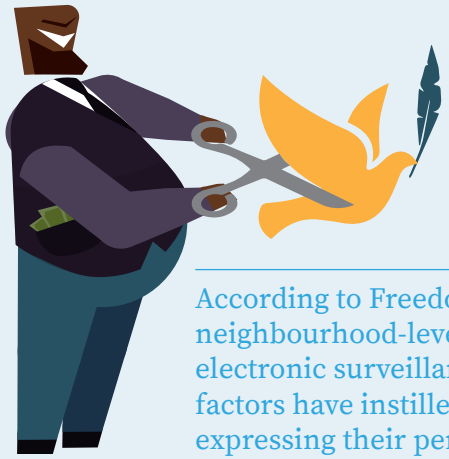
Various human rights and media landscape reports indicate that the situation of freedom of expression and of the media in Tanzania has continued to deteriorate. RSF (2020), for instance, notes that Tanzania under the late President John Pombe Magufuli has had a precipitous decline in protections for freedom of expression since 2015. RSF's (2020) World Press Freedom Index (WPFI) ranks Tanzania 124 out of 180 countries, a drop in ranking by six places, and a score of 40.25 percent, which is an increase in score of +3.97 compared to 2019. A score of zero is the best and 100 the worst, and an increase in score in the WPFI index means the level of freedom available to journalists in a country has fallen and this has been the case in Tanzania since 2015.

WJP (2020) scores Tanzania at a 0.43 out of 1 for Protections for Freedom of Expression, 0.46 for Right to Information and 0.47 for Rule of Law Index (where 0 indicates the lowest amount of freedom, and 1 the highest).

Freedom House ranks Tanzania's status as Partly Free with a score of 40/100, which is a reduction from 45/100 in 2019 (Freedom House, 2020). Tanzania also ranks low at 17/40 on Political Rights and 23/60 on Civil Liberties. Tanzania ranks lowest in East Africa on the Presence of Free and Independent Media, with a score of 1 out of 4, while on the question of whether Individuals are Free to Express their Personal Views on Political or Other Sensitive Topics without Fear of Surveillance or Retribution, Tanzania scores 1/4 (Freedom House, 2020). The government is neither open nor transparent and scores 1 out of 4 on the question How the Government Operates with Openness and Transparency.

According to Freedom House (2020), government surveillance through neighbourhood-level CCM cell structures, enactment of draconian laws and electronic surveillance have curtailed civil liberties and political rights. All these factors have instilled a sense of fear among the citizenry, who are apprehensive of expressing their personal views on political matters and sensitive issues.

Besides the media and journalists, Africa Media Barometer (AMB, 2019) reports that members of the public are unable to freely express their opinions and -- whereas in the past, people discussed politics openly next to newsstands or around bus stops -- the subjects of discussion have in the last few years changed from politics to football or religion. The report further indicates that even social media conversations have become well-guarded, especially with new laws that hold the moderators of discussion forums responsible for member-generated content. In the run up to the 2020 general elections, internet services in Tanzania were disrupted with a partial to total shutdown of popular social media sites like Facebook, Twitter, WhatsApp and YouTube (Ssessanga, 2020). Critics blamed the shutdown and its attendant high economic cost implications on the late President John Pombe Magufuli's disdain for the internet which he claimed was not conducive for his government's delivery of development to Tanzanians. A government official who remained anonymous is cited by Ssessanga as saying the shutdown of the internet during the elections was sanctioned by the government (Ssessanga, 2020), ostensibly to muzzle freedom of expression by individuals on popular social media sites.



According to Freedom House (2020), government surveillance through neighbourhood-level CCM cell structures, enactment of draconian laws and electronic surveillance have curtailed civil liberties and political rights. All these factors have instilled a sense of fear among the citizenry, who are apprehensive of expressing their personal views on political matters and sensitive issues.

Enacted legislations have continued to hinder the freedom of expression. These include the Online Content Regulations, 2020 under the Electronic and Postal Communications Act (2020) that provides discretionary powers to license internet-based content found on blogs, online television and digital radio with fairly punitive penalties like imprisonment for up to ten years and content removal.

Katunzi and Spurk (2020) found that there was a marked decline in political reporting in the Tanzanian media as sources including government ministers are apprehensive of appearing on record. The report further notes that most news reports are single sourced stories because it has become increasingly difficult to get sources willing to express their views, a situation that has led to reduction of viewpoints, especially on politics. According to the report, even ministers and senior public officials, because of the restrictive political environment, are increasingly reluctant to speak to the press (Katunzi & Spurk, 2020).

Unsurprisingly and as a consequence of the dearth of freedom of expression, critical features, analyses, commentary and opinions have all but disappeared from newspapers; and in the increasingly shrinking political space, journalists have turned their attention to subjects considered less sensitive. Investigative journalism has also suffered, with fewer projects examined every year and both investigative reporting and media coverage generally limited to urban centres (AMB, 2019).

Enacted legislations have continued to hinder the freedom of expression. These include the Online Content Regulations, 2020 under the Electronic and Postal Communications Act (2020) that provides discretionary powers to license internet-based content found on blogs, online television and digital radio with fairly punitive penalties like imprisonment for up to ten years and content removal. The Online Content Regulations, 2020 also imposes further restrictions that Article 19 (2021) notes fails to protect and promote freedom of expression. An analysis of the 2020 regulation by Article 19 indicates that it has expanded the categories of prohibited content, broadened filtering requirements, failed to define legislative terms used in the regulations, continued with the imposition of licensing for any right to publish online without justification. For news and current affairs content, the regulation imposes both application and licensing fees that add up to approximately US$480 for a period of three years. The regulation further requires fairly high annual fees payment and renewal of the license after three years (see the breakdown under legal equality), limiting publication of content on the digital platform for many, especially young people. Non-compliance is a criminal offence.

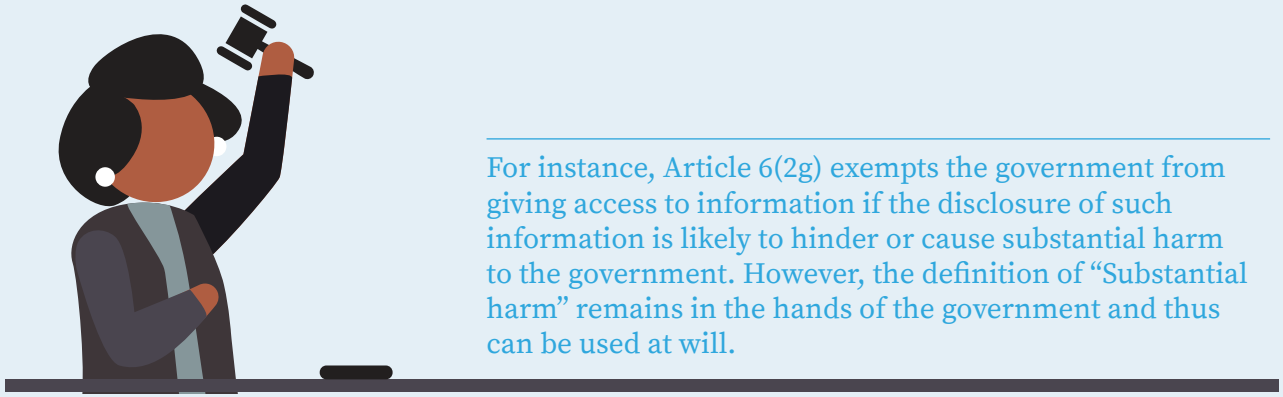
The Cybercrimes Act (2015) continues to impede free expression and privacy rights. A number of individuals have been charged under this Act and most notable in the recent past is the December, 2016 arrest of co-founders, Maxence Melo and Micke William of the popular whistleblowing and online discussion website JamiiForums who were charged under the Cybercrimes Act for failure to comply with a police order to disclose the identity of platform users.

The LHRC (2020) report shows that in January 2019, the regulatory authority, TCRA fined five television stations a total of TSh. 60 million ($27,000) for broadcasting a press conference by the LHRC in which the organisation accused the government security forces of abuses during the November 2017 by-elections. The regulator argued that the content was ‘seditious’ and contrary to the broadcasting regulation.

The Media Institute of Southern Africa (MISA, 2019) report indicates that between September 2017 and June 2019, Tanzanian media and human rights organisations reported more than 40 cases of intimidation, harassment, suspensions, closure and fines of media, arrest and detention, abductions and disappearance of journalists in the country. MISA's findings suggest that most of the identified violations were committed by government authorities, particularly the Police, the Ministry of Information, Arts and Sports officials, and unknown persons. Between 2017 and 2018, over 35 journalists were harassed, abducted, threatened, warned, arrested and temporarily detained by the police.

Additionally, the findings indicate that in the years 2017 to 2018, over 34 people were arrested, temporarily detained before appearing in courts of law, and charged under the Cybercrimes Act (2015) for running unregistered and unauthorized online media platforms. Other laws that infringe on the freedom of expression as per various reports include: The Media Services Act, 2016; Access to Information Act, 2016 and the Statistics Act, 2015 as amended in 2019. THRDC (2018) has also recorded various incidences of limiting the civic space through imposition of hefty fines to five media outlets (ITV, Channel Ten, EATV, Star TV and Azam 2), attack of journalists, and arbitrary arrest of more than 20 HRDs from January to November 2017.

In a nutshell, the freedom of the media in Tanzania has been on a decline in the last six years. This decline has been occasioned by enactment of several legislations used to charge journalists, a situation that has essentially led to self-censorship and dearth of critical reporting by journalists who find it hard to get sources on record. Moreover, the political environment has also made it difficult for top government officials and the citizenry at large to express themselves freely and this has further constricted the public sphere.



For instance, Article 6(2g) exempts the government from giving access to information if the disclosure of such information is likely to hinder or cause substantial harm to the government. However, the definition of "Substantial harm" remains in the hands of the government and thus can be used at will.

1.3 Access to Information

While efforts have been made to promote access to information, the full realisation of this right continues to be a significant challenge. After years of media and human rights advocacy, Tanzania finally passed an Access to Information Act in 2016. Despite many progressive clauses contained in the Act, accessing information has not been any easier (AMB, 2019).

The enactment of the Act was intended to operationalise Article 18 of the Constitution of the United Republic of Tanzania (1977), but this has not been the case. The Act provides that government officials and private actors must be available to provide information to NMOs on a fair and equitable basis, but there have been some limitations with the application and jurisdiction of the law (THRDC, 2018). This law mainly applies to Tanzania Mainland and not Zanzibar, even though the constitution refers to the United Republic of Tanzania (URT).

The Act also spells out a long list of exempted information. Some of these exemptions are not justifiable as they are against Article 18 of the URT Constitution. For instance, Article 6(2g) exempts the government from giving access to information if the disclosure of such information is likely to hinder or cause substantial harm to the government. However, the definition of "Substantial harm" remains in the hands of the government and thus can be used at will. Similarly, Article 6(3d) of the Act has no proper

guidance to what "foreign relations or foreign activities" mean and thus provides loopholes that make it possible for the government to hinder access to information. The excessive vagueness of section 6(3)(f) also makes it difficult to access information in certain situations such as projects related to the military and businesses whose major shareholder is Tanzania People's Defence Force (TPDF).

The Access to Information Act and its resultant regulations make it obligatory for governmental meetings, hearings, and press conferences to be accessible, but some government institutions are still denying the media access, using the vagueness of different sections and exemptions in the act to justify their exclusion. This dearth of access and transparency in government dealings explains why WJP (2020) scores Tanzania poorly on Publicised Laws and Government Data (0.24/1) and the Right to Information (0.46/1).

1.4 Legal Equality

The enactment of media regulatory laws like the Media Services Act, 2016, and the subsequent Media Services Regulations, 2017, has made the business environment for the private sector difficult. All newspapers were required to register afresh. Similarly, in preparation for presidential elections in 2020, media houses broadcasting foreign content were required to re-register and gain additional permission (DW, 2020). In general, media houses that have foreign investors like Mwananchi Communications Limited (MCL), owned by the Nation Media Group (NMG) whose principal shareholder is his highness the Aga Khan, find themselves in difficult positions. Under the Media Services Regulations 2017, only Tanzanian citizens are allowed to have a 100 percent shareholding stake. The maximum cap for foreigners is 49 percent, and the rest must be owned by Tanzanian nationals (RSF, 2018).

Under the Media Services Regulations 2017, only Tanzanian citizens are allowed to have a 100 percent shareholding stake. The maximum cap for foreigners is 49 percent, and the rest must be owned by Tanzanian nationals (RSF, 2018).

In addition, for foreign donors to support media organisations with civic education programmes, public awareness on elections, and capacity building of journalists, the Registrar of Political Parties must provide approval as per the Political Parties Amendment Act (2019). Section 5(A)(1) of this Act spells out that the registrar may disapprove of any donor support. The same provision of the Political Parties (amendment) Act 2019 also applies to journalists involved in any activities that incorporate political parties, their programmes and getting funds from abroad.

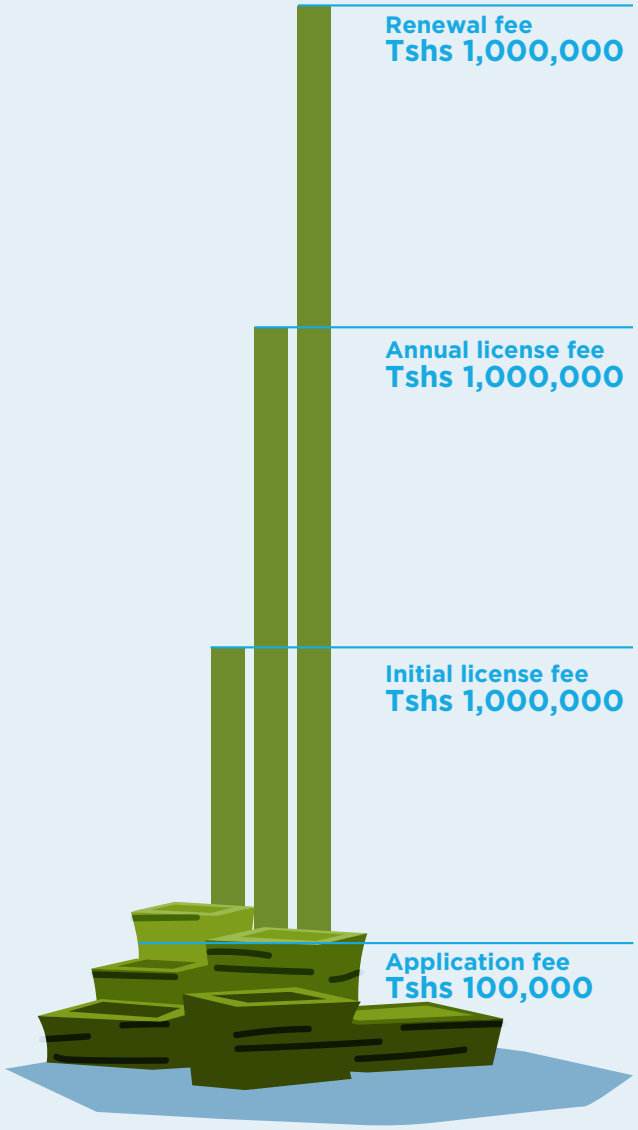
The Twaweza (2017a) report has raised exceptions with these restrictions noting that even though the law seeks to protect Tanzanian media and democracy from undue outside interference, the Declaration of Principles on Freedom of Expression in Africa makes it clear that limitations of this kind should not be so stringent as to inhibit the development of the media. Twaweza (2017a) argues, and rightly so, that foreign funding brings investment, expertise and other benefits, and has suggested an assessment of investment levels in the media industry to avoid foreign domination, while balancing the need to attract funding and expertise from abroad to the media industry.

The Electronic and Postal Communications (Online Content) Regulations, 2020, provides for mandatory registration and licensing, including registration of bloggers, which is not in line with international standards on freedom of expression. The regulations also require payment of registration fees, license fees and annual fees. Regarding online content services, the Second Schedule of the Regulations sets the application fee at Tshs. 100,000 (43.24 USD); initial license fee at Tshs. 1,000,000 (431.96 USD); annual license fee at 1,000,000 (431.96 USD); and renewal fee at Tshs. 1,000,000 (431.96 USD). With the above requirement, stakeholders like LHRC (2018), Twaweza (2017a), THRDC (2018), MISA (2019) and MCT (2017) have argued that the fees are exorbitant for most Tanzanians and deprive potential new bloggers of the right to exercise their freedom of expression on the internet, thereby limiting the flow of ideas and information.

Operation of newspapers to a large extent depends on advertising, but the Media Services Regulation, 2017, has introduced a new restriction on obtaining advertisements from government agencies. The regulations further stipulate that the director of the Information Services Department (ISD) will be the government advertising agent. This requires government ministries, departments, agencies, Local Government Authorities as well as projects with over 50 percent Government funding to channel their advertisements through the Director of ISD. To this end, the government ends up controlling the media by starving media houses critical of the government of advertising revenue, while channelling the same to media houses that are supportive of the government agenda. It is therefore safe to argue that the government in Tanzania has, through legislation and control of the government advertising, established an environment in which the media in Tanzania rarely run with views that are in competition with the government position.

It is therefore safe to conclude that the media in Tanzania has been targeted with fairly restrictive legislative frameworks that are different from the other sectors of the economy. Some of the legal demands that seem stringent for media business include restrictions on foreign investments and the recently enacted laws like Electronic and Postal Communications (Online Content) Regulations (2020), Media Services Regulations (2017) and Political Parties Amendment Act (2019) which when looked at collectively make very exorbitant financial demands for media business and at the same time restrict financial investments and capacity building activities by non-Tanzanians.

Stakeholders have argued that the fees are exorbitant for most Tanzanians and deprive potential new bloggers of the right to exercise their freedom of expression on the internet, thereby limiting the flow of ideas and information.



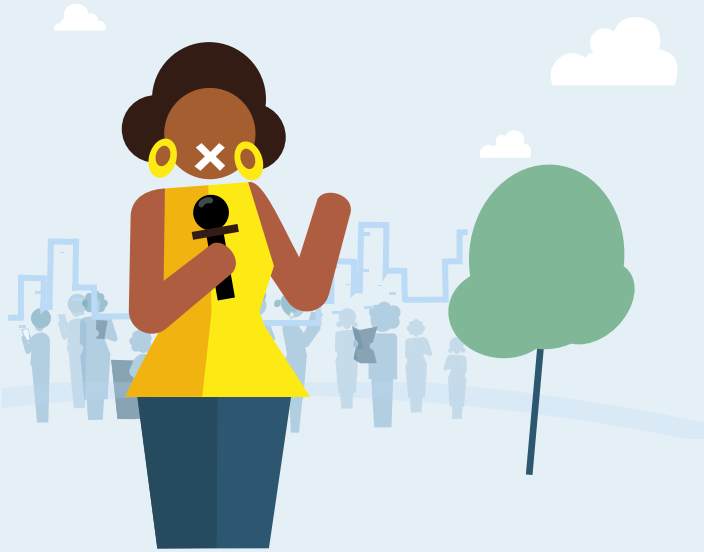
1.5 Media within Society

The surveillance function of the media and the watchdog role in Tanzania's socio-political and economic environment has created hostility between the media and government officials. Twaweza (2017b) reports that across East Africa, between 2014 and 2017, citizens have generally supported media freedom more than they have supported government control of the media. However, compared to Kenya and Uganda, Tanzanians seem to support government control of the media with a majority (58%) of the citizens in the Twaweza survey agreeing that the government should have the right to stop the media from publishing things the government considers harmful to society. Moreover, Tanzanians were found more likely to agree that too much negative reporting can harm the country as 32% of Tanzanian citizens in the survey supported this view compared to 28% in Kenya and 24% in Uganda.

While incidences are known to exist, there is very limited reporting on organisations or individuals who threaten or injure journalists. An MCT (2019a) investigation mentioned lack of trust in the law enforcement agencies, delays in completion of investigation of existing cases and the feeling among journalists that the authorities either abet or are complicit in the cover up of the violations. One or two cases have been reported where police officers faced criminal charges for attacking journalists and killing journalists.

Currently, there are a number of professional associations such as the LHRC, MCT, THRDC, MISA - Tanzania and Twaweza that are advocating for the rights and safety of journalists. There are also groups of individual lawyers working with these organisations to file cases challenging various laws and regulations that infringe on the rights of journalists or their organisations. A typical example is the case that was filed before the African Court on Human and People's Rights to challenge a number of provisions of the Media Services Act, 2016. The East African Court of Justice, a regional court, ruled in March 2019 that the Media Services Act, 2016 was against protocols of the East African Community (EAC) treaty (LHRC, 2019).

These findings indicate that the media in Tanzania seem to face challenges, exacerbated to some extent by a society that seems to be supportive of the government's clamp down on the media. The society does seem to support efforts to cut down on negative reporting and are to some extent complicit to the intimidations, violence and threats meted on journalists. The efforts by different civil society and media development organisations appear to be pushing for the rights of journalists in a society where the civil space has been limited by the restrictive political environment.



Twaweza (2017b) reports that across East Africa, between 2014 and 2017, citizens have generally supported media freedom more than they have supported government control of the media. However, compared to Kenya and Uganda, Tanzanians seem to support government control of the media with a majority (58%) of the citizens in the Twaweza survey agreeing that the government should have the right to stop the media from publishing things the government considers harmful to society.

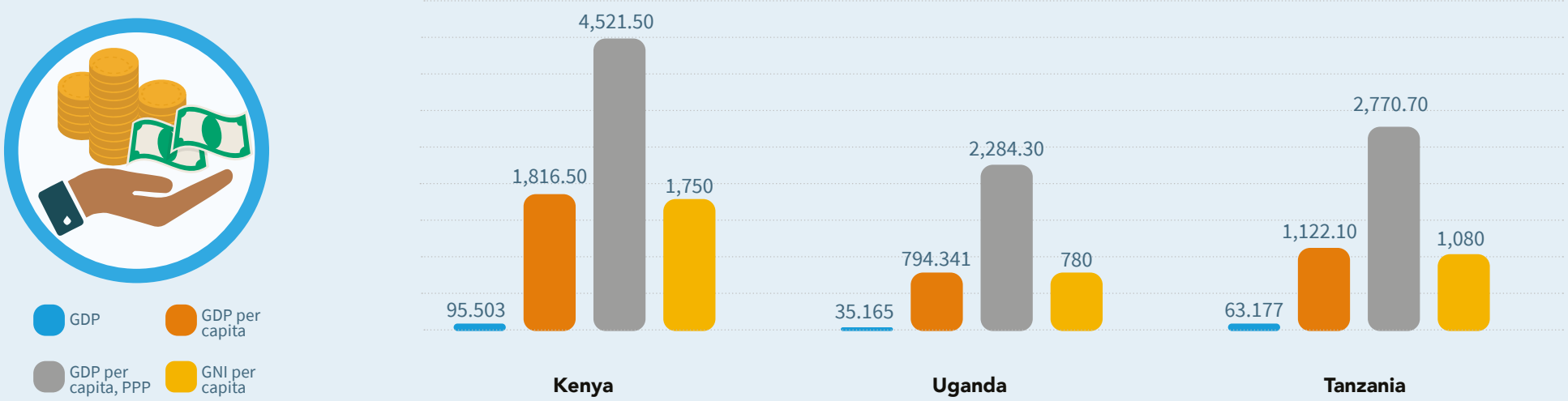
2.0 Economics

The economic health of the nation is a critical factor in news media viability. The strength of the local economy and the distribution of wealth across the population affects the 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 organisations (NMOs) 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.

Tanzania is a member of both the East African Community (EAC) and the Southern African Development Community (SADC). It has an economy that encourages private enterprise combined with economic planning and regulation by the central government.

The media landscape in Tanzania continues to be diverse and highly competitive, offering the population a wide range of sources of news and entertainment (AMB, 2019). Most media companies are concentrated in urban areas, especially Dar es Salaam, even though the majority of the population (70%) lives in rural areas. Higher amounts of disposable income among the people in urban areas and the likelihood to spend on media products compared to the rural populations, may be one factor influencing this.

The relatively high cost of newspapers and data, limits access to newspapers and online content for poor rural and marginalised communities (AMB, 2019). The migration to terrestrial digital broadcasting has also added an extra burden as many households have been forced to invest in set-top-boxes. In terms of advertising expenditure, Tanzanian media operate in a very competitive environment where the pool of advertising revenue is not sufficient to support a diverse media industry. According to the African Media Barometer (AMB, 2019) community radio stations are funded by advertising from municipalities and businesses, as well as UNESCO and other donors. Organisations such as UNESCO have also partnered with journalism schools to build the capacity of community radio journalists through e-learning programs and mentorships (AMB, 2019).



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

2.1 National Economy

The World Bank classifies Tanzania as a lower middle-income country (World Bank, 2019), a higher ranking from the low-income country in 2018 (Battaile, 2020). The GDP is estimated at $63.177 billion and the GDP per capita 1,122.1. The country's GNI per capita is $1,080 while the GDP Per capita, Purchasing Power Parity (PPP) is $2,770.70 as per the World Bank report for 2019 data (World Bank, 2020).

Despite a sustained average economic growth rate of 6-7 percent every year, the economic situation in Tanzania does not support a strong advertising market (MCT, 2017). Moreover, the advertising budget spend and allocations by corporates, governments, non-governmental organisations and individuals have significantly reduced. The situation is said to have worsened with the coming to power of the fifth government towards the end of 2015, and its determination to cut down what it considered unnecessary expenditure by public institutions. The current economic situation in the county is thus tenuous for media organisations' as they strive to diversify revenue sources.

2.2 Financial Stability of News Media Organisations

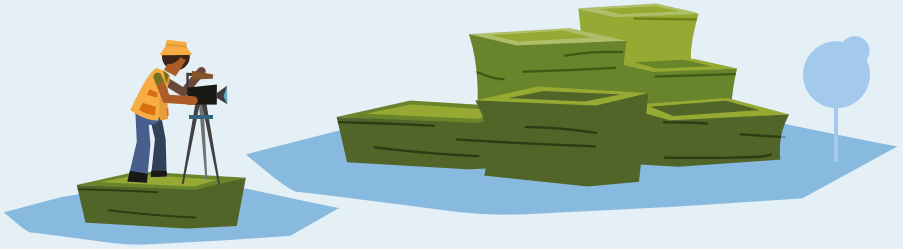
Reports from AMB (2015) and MCT (2019b) show a decline in advertisement revenue, a situation that has seen national news media struggle to sustain operations due to reductions in advertising revenues. The changing media environment has caused stiff competition from entrants who have leveraged on the digital platform, while the current economic situation in the county has seen most media organisations struggle to survive. Furthermore, the same reports indicate that many media houses have been forced to lay off employees, while others are struggling with payment of salaries.

The advertising market has shrunk over the years, leaving only a handful of major advertisers; notably the telecommunications, brewery and banking companies. Worse still for some private media organisations, the government controls a significant share of advertisement spending, which is channelled selectively to state-owned and pro-government private press. A number of private advertisers, for fear of the government reprisals, have also avoided news outlets that are critical of the government. This practice has not only constricted the market, but also led to inequalities in the distribution of advertising revenue throughout the industry (AMB, 2019), a situation that has negatively affected financial stability of independent media.

The State of the Media Report 2017 (MCT, 2017) further established that a changing media environment and the fast-growing online communication are also responsible for the dramatic decline in newspapers' advertising. The shift in newspaper readership from hard copy publications to online articles continues to affect advertising trends as major advertisers are attracted to social media platforms such as Facebook, WhatsApp, Instagram and Blogs, which guarantee wider exposure at low cost.

There is a glimmer of hope as some media organisations have developed various revenue generating initiatives. The Nation Media Group's Mwananchi Communications Limited (MCL), for example, has a thought-leadership forum known as Jukwaa la Fikra that serves as an additional revenue stream. Mwananchi has partnered with Radio One

The advertising market has shrunk over the years, leaving only a handful of major advertisers; notably the telecommunications, brewery and banking companies. Worse still for some private media organisations, the government controls a significant share of advertisement spending, which is channelled selectively to state-owned and progovernment private press.



and ITV to run the forum. The government-owned newspaper, the Daily News, on the other hand, organises regional business forums to attract sponsors as an additional revenue stream. However, a lot needs to be done to guarantee financial stability and sustainability. Key among the strategies is NMOs' need to invest in reliable ways to collect audience data which would inform strategies that will widen their revenue sources and enable them to better meet the needs of their readers.

News media organisations that are struggling for capital injection and revenues are forced to run with the government position, sometimes at the expense of public interest. This is because the government uses advertising as a bait to rally the media to run with the government agenda.

2.3 Financial Independence of News Media Organisations

The media in Tanzania, though diverse, vibrant and plural; face a number of emergent challenges that compromise the financial independence of NMOs. The major challenges include a dearth of investment capital and declining advertising revenues, which coupled with high taxation and an unfriendly legal framework not only make the media vulnerable to undue influence, but also threaten the media's survival (Gicheru, 2014). NMOs that are struggling for capital injection and revenues are forced to run with the government position, sometimes at the expense of public interest. This is because the government uses advertising as a bait to rally the media to run with the government agenda. The AMB (2019) and the State of the Media Report (Spurk & Katunzi, 2019) established that the government uses adverts as a whip against critical media outlets and that the director of ISD dictates which media houses get advertisements, consequently, interfering with editorial content and decisions. Tanzania Media Foundation (TMF, 2015) further noted that media outlets that depend on advertisers and sponsors and secure advertising easily from the government and other big businesses, tend to compromise their editorial autonomy, as they adopt editorial approaches that do not cover these advertisers and sponsors critically.

Moreover, the government's position as the main advertiser makes the media vulnerable to unwarranted editorial influence from state and government officials. MCT (2019b) further notes that more support, especially on innovation and the capacity to innovate around business models and revenue generation, seems like the best pathway to make media outlets independent and financially sustainable.

The legal framework does not provide for an enabling environment for foreign organisations to support NMOs towards financial independence. Different pieces of legislation, such as the Political Parties Amendment Act (2019), make it fairly difficult for foreign organisations to support the media, either financially or through content subsidies and capacity building. Nevertheless, the media continues to receive support from organisations such as Internews, TMF, Journalists Environmental Association of Tanzania (JET), Tanzania Media Women's Association (TAMWA), United Nations Education Scientific and Cultural Organisation (UNESCO), MISA-Tanzania, Union of Tanzania Press Clubs (UTPC), Tanzania Editors Forum (TEF) and Friedrich Ebert Stiftung (FES).

The NMOs have opportunities to work towards financial independence and TMF (2015), for instance, notes that NMOs need to address the dearth of marketing and advertising strategies as this is the most significant challenge media houses face in approaching and convincing advertisers.

2.4 Competition

The changing media environment has caused stiff competition from entrants who have leveraged on the digital platform. In addition, private media organisations with limited capital are unable to compete with state subsidized competitors in Tanzania. They are also unable to overcome the challenges resulting from business regulations such as taxes on media-related equipment and the lack of an enabling legal environment (Gicheru, 2014). The 2019 AMB report on Tanzania indicates that existing legal and regulatory frameworks work against the emergence of economically sustainable, competitive and independent media, and this hinders citizens from benefiting from the country's diverse media landscape. Furthermore, the high and prohibitive license fees for all media put them on shaky ground in a media environment that has been disrupted by technology and hard hit by the COVID-19 pandemic.

As of March 2020, there were 183 radio stations, 37 Free to Air TV stations, two Satellite TV stations and four Digital Terrestrial Television (DTT) and Digital to Home (DTH) TV stations (Katunzi & Spurk, 2020). The print sector in Tanzania is the most diverse in East Africa and Katunzi and Spurk note that there are 229 newspapers and magazines in Tanzania Mainland, 78 percent being privately owned and the rest owned by the government and its parastatals. A media mapping by a consortium of researchers in this study, however, found that not all these newspapers and magazines are news producing publications. In Zanzibar, there are 25 radio stations, 12 TV stations and two newspapers (Interview with TCRA officials).

The 2019 AMB report on Tanzania indicates that existing legal and regulatory frameworks work against the emergence of economically sustainable, competitive and independent media, and this hinders citizens from benefiting from the country's diverse media landscape.

2.5 Audience demand and quality of journalism

Literature on the extent to which audiences value quality journalism content to be willing to pay for it is scarce. But since a majority of the media audience is rural and have limited disposable income, subscription as a revenue source is yet to gain traction in Tanzania. Most traditional media outlets have established online versions and are increasingly packaging their news content to target different audiences, sponsors and advertisers. They have also initiated collaborations with mobile phone companies to facilitate subscriptions to news content (MCT, 2017; MCT, 2019b; Spurk & Katunzi, 2019). Despite all these efforts to reach a wider audience through the digital platform, the online audience is accustomed to free content and the media is struggling with monetisation of content on digital platforms. In addition, these efforts to leverage on the growing online platforms depend on the internet and access remains relatively low at 37.6 percent (Internet World Stats, 2020).

The majority of citizens consume mostly news from legacy media platforms, which they perceive to be impartial in coverage of issues and reflective of multiple perspectives. Therefore, even though there is increased consumption from multiple sources and perspectives including social media that is predominantly used by citizen journalists, most consumers still find legacy platforms more

credible (Gicheru, 2014). Afritech News notes that JamiiForums, an online public platform, has made such an impact as a democratic space for discussion of societal issues such as corruption, politics and government accountability that it has attracted intimidation and repeated attempts to clampdown on both the founders and its users (Mbogo, 2020).

The majority of Tanzanians, especially in the rural areas, cannot afford to buy media products because of their personal economic situations. Instead, they perceive reading newspapers as a luxury, and prefer to listen to the radio, which is cheaper and accessible to many Tanzanians.

Tanzanians, especially most in rural areas, are disadvantaged in three ways as the media grapple with the digital disruption and the public grapples

The majority of Tanzanians, especially in the rural areas, cannot afford to buy media products because of their personal economic situations. Instead, they perceive reading newspapers as a luxury, and prefer to listen to the radio, which is cheaper and accessible to many Tanzanians.

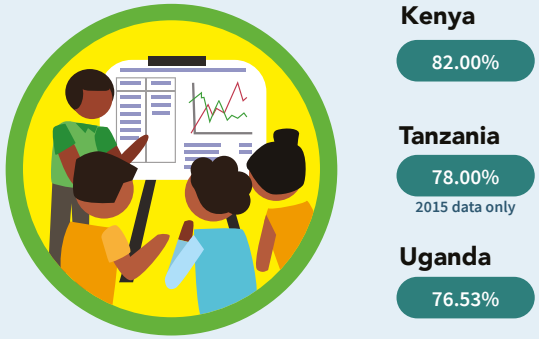
At Tsh 1000 (less than half a dollar), for instance, newspapers cost as much as a loaf of bread; the opportunity costs of buying a newspaper or even data are too high for most citizens.

with changes in technology including access to media technology. First, according to the 2019 AMB report, the operational cost of media businesses is rising and media organisations are transferring the cost to the end consumer, a situation that has reduced accessibility for the poor in rural areas. At Tsh 1000 (less than half a dollar), for instance, newspapers cost as much as a loaf of bread; the opportunity costs of buying a newspaper or even data are too high for most citizens.

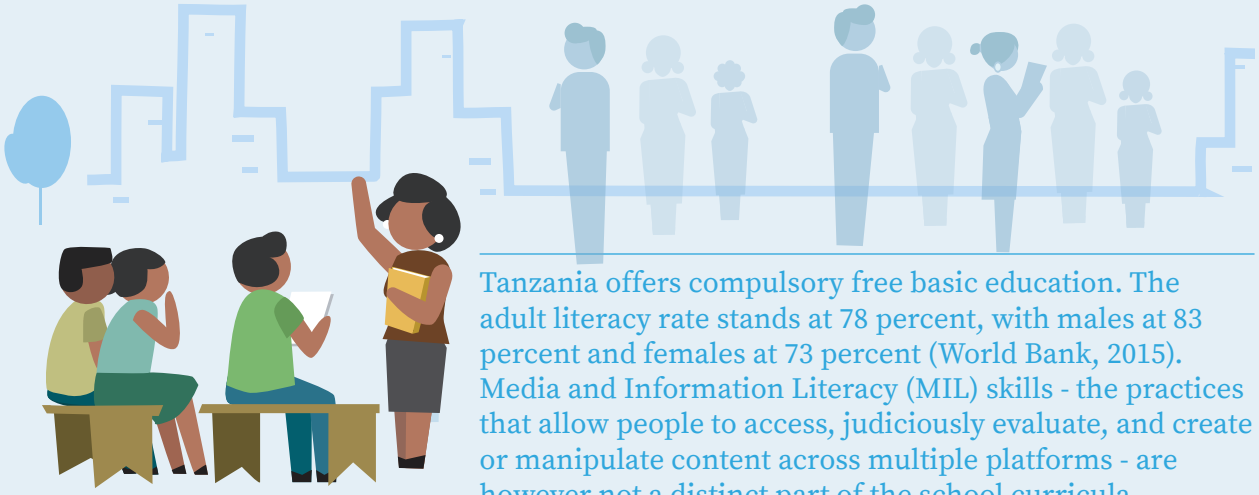
Secondly, as media houses in Tanzania cut down on operational costs due to the reduced revenues and competition from the digital platforms, the rural areas have been affected more as they have borne the brunt of the scaled-down media coverage. Lastly, the migration to terrestrial TV broadcasting technology has put an extra burden on households as they have to either switch to more modern TV sets or purchase decoders to capture free-to-air signals.

3.0 Community

Democracy requires citizens to be informed if they are to effectively perform their duties as civic 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 organisations (NMOs) have both access to quality data about their audiences and the skills required to understand and apply those data to news decisions.



| Figure 4: Literacy Rate (UNESCO, 2020)



Tanzania offers compulsory free basic education. The adult literacy rate stands at 78 percent, with males at 83 percent and females at 73 percent (World Bank, 2015). Media and Information Literacy (MIL) skills - the practices that allow people to access, judiciously evaluate, and create or manipulate content across multiple platforms - are however not a distinct part of the school curricula.

3.1 Citizen education

Tanzania offers compulsory free basic education. The adult literacy rate stands at 78 percent, with males at 83 percent and females at 73 percent (World Bank, 2015). Media and Information Literacy (MIL) skills - the practices that allow people to access, judiciously evaluate, and create or manipulate content across multiple platforms - are however not a distinct part of the school curricula. Previous studies have found that university students scored poorly on information literacy skills and practices (Klomsri & Tedre, 2016). Most recently, Facebook launched a media literacy campaign in Tanzania to reduce the spread of misinformation and protect the integrity of democracy during the Tanzanian elections (The Citizen, 2020). Although citizen consumption of media is changing from legacy media to digital, albeit with tech access challenges, legacy media continues to be an important part of people's daily lives, regardless of its form. According to MCT's (2019b) State of the Media Report which covered the 2017/2018 period, newspapers are now coming up with online versions and launching apps targeting different markets to ensure provision of what consumers are looking for: trust and credibility. Tanzanian publics, in the recent past, followed media content and view it as an important ally of the state and critical for development.

3.2 Social cohesion

Tanzania is a stable and fairly cohesive country compared to its regional peers. The social structure of Tanzania provides room for people of all spheres of life to participate in decision and policy making processes, even though the recent political dispensation has seen the government suppress divergent views both in politics and in the public spheres. In Tanzanian policy making, the emphasis is on separation between social and economic policy, which is "partly informed by the perception that the economic problems that emerged towards the end of the Ujamaa period under Nyerere were a result of an excessive focus on social concerns" over a focus on economic growth and efficiency (ESRF, 2018 p. 37).

Media in Tanzania is charged with enhancing unity and harmony, roles that date back to the pre-independence period (Ng'wanakilala, 1981). The collaborative role of the media in nation building in Tanzania can be traced back to socialism Tanzania and the directives that required both private and public broadcast media to promote national interest and issues of national importance as prescribed by the government (Ng'wanakilala, 1981). With such directives, and different interpretations of public interest by the establishment, increased restrictions on media pluralism have continued in the guise of promoting national cohesion. The most recent regulations, for instance, prohibit local radio and television stations from broadcasting foreign content without express permission from the government (Public Media Alliance, 2020).

3.3 Trust and credibility

Even though earlier studies by TMF (2016) reported that the public perceived the media as a media system that kept the government in check, not many Tanzanians are fully satisfied with the media's watchdog role and generally, the level of trust in the media in Tanzania is declining (Schiffrin, 2017). Citizens are increasingly complaining about media outlets when aggrieved by their coverage. For instance, the MCT (2019b) State of the Media Report for 2017/18 reported that the council arbitration body received eight complaints in 2018 against some newspapers. The survey shows that even though the public is more interested in stories related to health and education, the media pays more attention to politics and the public feels that politics is overrepresented. According to the survey, the public is least positive about the quality of newspapers, followed by television. Radio was appreciated in terms of quality.

Citizens are increasingly complaining about media outlets when aggrieved by their coverage. For instance, the MCT (2019b) State of the Media Report for 2017/18 reported that the council arbitration body received eight complaints in 2018 against some newspapers. The survey shows that even though the public is more interested in stories related to health and education, the media pays more attention to politics and the public feels that politics is overrepresented.

Traditional media in Tanzania are not known to use citizen journalists to get information as they are rooted in the tradition of sourcing information from people in authority and experts (Mukendi, n.d). However, the emergence of citizen journalists, who are deeply engaged with communities and report issues first-hand from the local communities, has given most local community members and marginalised people the platforms to tell their own stories.

3.4 Participation

In Tanzania, there is a challenge in getting locally produced content, especially in television. However, some outlets strive to get the people speaking and debating on issues aired. AMB (2015) mentions local and privately-owned station, Independent Television (ITV) as an outlet that gives voice to the people's debates. The TV programmes that air public debates and opinion attract a lot of interest from the public to the extent that "community radio stations are sometimes approached by listeners to rebroadcast specific ITV programmes on radio, and sometimes these are rebroadcast three or four times and elicit many phone-ins as a result, indicating a definite public interest in such programming" (AMB, 2015, p. 40).

As in most parts of the world, the influence of social and digital media has recently increased and this has led to a substantial change in the nature of Tanzania's media landscape, providing journalists and potentially any citizen with new means and platforms to express their ideas (FES, 2018). The MCT (2019b) indicates that increasingly, digital technologies have made it possible for people to access the internet and use digital tools, enabling them to connect, interact, share and download content from mainstream media. The trend of ordinary citizens massively debating issues initiated on social media and how they question government officials' actions through social networking platforms is a good example of how social media has expanded the public sphere (MCT, 2017). This is particularly clear through the popular social media news site JamiiForums, a user generated content site with strict content rules, moderators and over 570,000 active members. So popular have the online discussions become that the establishment has enacted legislations and regulations since 2015 with the main intent of regulating the space.

Traditional media in Tanzania are not known to use citizen journalists to get information as they are rooted in the tradition of sourcing information from people in authority and experts (Mukendi, n.d). However, the emergence of citizen journalists, who are deeply engaged with communities and report issues first-hand from the local communities, have given most local community members and marginalised people the platforms to tell their own stories. Hussein (2015) further found that citizen journalists are challenging mainstream journalists and positively pushing journalists to explore issues deeper and beyond what citizen journalists do. Consequently, the content, story ideas and issues covered by citizen journalists are increasingly incorporated more into the legacy media, especially private media (Hussein, 2015). Based on Mukendi (n.d.) and Hussein's (2015) findings, the incorporation of citizen journalists' content into the mainstream media seems to be widening citizens' participation as it pushes the marginal and community issues that would have otherwise remained in peripheral spaces into the national public domain.

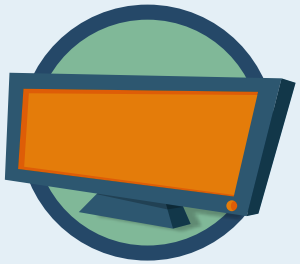
.

3.5 Audience Data

The RSF (2018) Media Ownership Monitor shows that Tanzania's audience concentration exists in three sectors; the printed press, radio, and TV. Print is dominated by four companies, with Mwananchi Communications Limited (MCL) taking the lead. A high concentration exists for TV and radio, with the IPP Media Group, Clouds Entertainment and also the state-owned Tanzanian Public Broadcasting (TBC) dominating the market. Regarding newspapers, the Media Ownership Monitor indicates that only 28 percent of Tanzanians read a newspaper at least once a month, while 56 percent never read one (RSF, 2018). This is because the majority of Tanzanians, especially in the rural areas, view reading newspapers as a luxury, preferring instead to listen to radio. Among factors contributing to this kind of situation include illiteracy and unaffordability. But it is also the case that a daily newspaper review during live broadcast on radio and TV has led to dwindling newspapers sales. Tanzania Media Fund (now Tanzania Media Foundation) survey (TMF, 2016) on community and decision makers' perception of the media shows that newspapers in the national language, Swahili, have a wider range of titles for readers to choose from compared to English publications, which are seen as targeting the elite.

According to the Media Ownership Monitor (RSF, 2018), radio is the most popular medium across the whole country. The 2018 Yearbook on Media Quality in Tanzania shows radio reaches most Tanzanians (96.5%) (Spurk & Katunzi, 2019). In rural areas, approximately two-thirds (61.5%) remain reliant on radio as a sole means of formal communication on news and current affairs, while in urban areas the proportion drops to just under a quarter (24.3%). The Media Ownership Monitor (2018) also shows TV is considered a less important news source compared to radio; 47 percent of Tanzanians use TV as an information source at least once a month. However, not even a quarter of the population uses it daily. Thirty-nine percent never watch TV to get information.

Statistics on audience share are available from international research firms such as GeoPoll and Ipsos. Such firms have to demonstrate adherence to Tanzania's Statistics Law (Wangari, 2017). However, the data available, collected at the national level, focuses on the larger players in the media landscape and it does appear that small and medium media houses are not covered in most of the audience data surveys.



47 percent of Tanzanians use TV as an information source at least once a month.

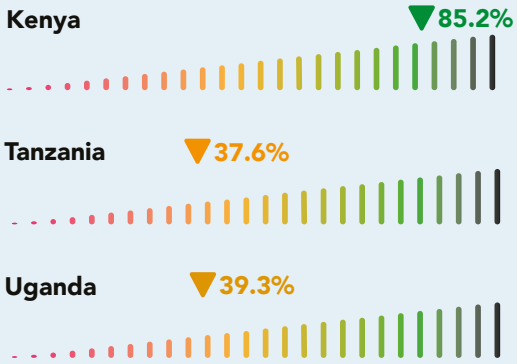
Only 28 percent of Tanzanians read a newspaper at least once a month, while 56 percent never read one.

In rural areas approximately two-thirds (61.5%) remain reliant on radio as a sole means of formal communication on news and current affairs, while in urban areas the proportion drops to just under a quarter (24.3%).

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 organisations (NMOs) 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. NMOs also must have access to an affordable labour force of technology experts, who are trained to maintain and optimize the organisation'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.

In Tanzania, the cost of technology, especially the latest broadcast equipment, has been an impediment to quality content production. Even in cases where NMOs have access to modern technology, they face the challenge of getting qualified personnel to operate the same technology for maximum outputs (Spurk & Katunzi, 2019). Furthermore, citizens also face challenges such as a skills gap, low internet penetration, limited access to digital devices, inadequate resources to upgrade devices, and low awareness regarding the benefits resulting from technology use (Zelezny-Green, Vosloo & Conole 2018). Thus, it is important to note that as far as technology is concerned the urbanite audience in Tanzania is fairly tech savvy and can afford tech driven consumption habits, while rural audiences struggle to access technology. This has led to the media investing in technology for only a segment of the population with fairly low returns on investments.



Internet Penetration (World Internet Stats, 2020)

4.1 Production and distribution resources

Media houses require physical resources to produce and distribute content. Available literature shows that these resources are inadequate and expensive for most news media organisations (NMOs) in the country, especially in the broadcast sector where most operations require quality and modern equipment, which is costly. Tanzania with a population of 59,743,218 has the lowest internet penetration at 37.60 percent compared to Kenya (85.2%) and Uganda (39.30%) (World Internet Statistics, 2021).

According to the MCT (2019b) report on the state of broadcasting in Tanzania, with the exception of big media houses based in the cities, most media houses lack the capital to invest in technology and are reliant on outdated or basic equipment that cannot deliver quality content. Community radios are the most affected, and most operate with fairly limited and outdated tools. They also lack trained broadcast journalists and technicians to competently handle the technical problems facing community radios. Moreover, many private station owners are reluctant to train their staff. They invest the bare minimum in staff development and focus more on their quest to maximise their profits by limiting their capital and human resource investments (MCT, 2019b).

4.2 News media organisations' access to technologies

Some progress has been made in NMOs' access to technologies. While newspapers are still curtailed by infrastructural challenges, notable developments are seen in the use of Information Communication Technologies (ICT) facilitated by the increase in internet penetration and access to ICT tools. According to the State of Internet Freedom in Africa (2018) there has been an increase in technological use by media houses and with increased internet penetrations, these media organisations are likely to have access to more audiences who have technology. However, there are still hurdles for prospective content providers such as licensing requirements for provision of online content and a broad range of prohibited content. The Electronic and Postal Communication (Online Content) Regulations 2020 entrenches the licensing and taxation of bloggers, online discussion forums, radio and television webcasters and thus, arguably, represses online speech, privacy and access to information (Article 19, 2021; MCT, 2020).

4.3 Audiences access to digital technology

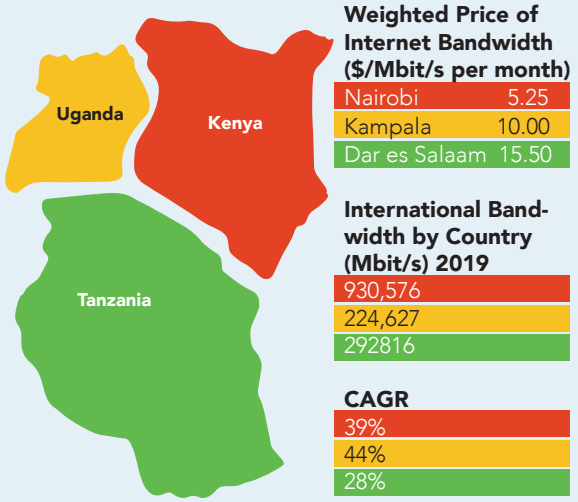
In 2017 and 2018, Tanzania Mainland continued to record a gradual increase in citizens' access to ICT. The internet landscape continued to expand alongside increased accessibility to mobile broadband devices, smartphones and other internet-enabled handsets (AMB, 2019). The AMB (2019) report on Tanzania shows accessing information via the internet is limited by technology, infrastructure and the cost of internet access. Even though users pay less than US$1 for a gigabyte of data, this cost is considered to be high for most citizens. Compared to the other East African countries Tanzania has the least Compound Annual Growth Rate (CAGR) and Tanzania's commercial capital, Dar es Salaam, is comparably one of the most expensive cities to procure internet bundles (Trade and Investment Global Practice, Africa Region, 2020) as shown in table 1 below.

The gender gap in audiences' access to the internet is particularly stark (113% compared to 18% in Uganda) according to the Alliance for Affordable Internet (A4AI, 2019). The rural-urban and gender gap inequality in accessing the internet and by extension the alternative news sources, is further exacerbated by the social media tax imposed on digital content providers.

Figure 6: Weighted Prices for internet bandwidth (Telegeography 2019b as cited in Trade and Investment Global Practice, Africa Region, 2020)

4.4 Digital expertise

To effectively manage the media in today's evolving digital world, media workers such as journalists require digital technology expertise, skills and knowledge that allow them to optimise content discovery, packaging, distribution, and marketing. The MCT (2019b) report shows that many journalists from print, broadcasting or new media platforms lack most of the requisite expertise. According to the report, poor expertise among the print media journalists is the reason why they have failed to maximise on the use of technology in improving the quality of their content, as well as in adopting online marketing strategies. Inadequate knowledge is also said to be the reason why some organisations are still lagging behind in reporting multi-media stories and using technology in reaching many readers.



However, the MCT (2019b) report also acknowledges notable developments in some media houses that have adopted online and digital approaches in addition to the traditional news gathering approaches. The report further indicates that media houses are still struggling to adjust to the many digital demands such as: integrating their newsrooms to maximise on the potential of convergence; coming up with good online content and launching apps that target niche markets with unique content and developing new products for different consumers. Within the broadcasting sector, the lack of skilled personnel is a major challenge as most of the existing personnel lack the capacity to use sophisticated and expensive digital equipment that require high technical skills to handle.

The community radio stations seem to struggle when it comes to technology because they rely on volunteers who are often not adept at technology use. This is mainly because these radio stations cannot afford to hire permanent staff due to financial constraints. The disadvantage is that most volunteers gain experience in these regional, district and community radios; which are increasingly considered training grounds, and eventually opt to move to commercial radio stations that offer attractive remuneration (MCT, 2019b).

In a nutshell, there are capacity gaps in digital expertise and these challenges are exacerbated by the establishment of online and digital platforms without adequate human resources and expertise to monetise content.

4.5 Citizens' digital rights

The numerous opportunities offered by access to technology in Tanzania are not fully utilised due to factors such as skills gap, relatively low internet penetration in rural areas, limited access to digital devices and low awareness regarding the benefits resulting from technology use (MCT, 2017). Misuse of the internet recently led to the enactment of new regulations and licensing of online service providers to minimise the misuse of online media (Electronic and Postal Communications (Online Content) Regulations, 2020). Such regulations tend to not only limit digital rights, but also give the authorities the leeway to clamp down on online service providers who are perceived to be anti-establishment.

Instances of privacy and data security breaches are common as the authorities employ surveillance and loopholes in the law to monitor individuals perceived to be anti-establishment in the name of national security. Reports by different reputable organisations chronicle how the establishment has and continues to use the Cybercrimes Act, 2015; and the Electronic and Postal Communications (Online Content) Regulations, 2020, to violate the rights of digital users (MCT, 2017; MCT, 2019a; CIPESA, 2018). Under the Cybercrimes Act, some provisions are prone to manipulation such as Section 32, which authorises the police to compel disclosure of data for purposes of criminal investigations. Other contentious sections are the one penalising any person who intentionally and unlawfully receives unauthorised information, and the provision that gives the police extensive power to search and seize communication equipment. Such regulations have been used to threaten online content service providers and users with arbitrary arrests and prosecutions. The report mentions Maxence Melo,

Under the Cybercrimes Act, some provisions are prone to manipulation such as Section 32, which authorises the police to compel disclosure of data for purposes of criminal investigations. Other contentious sections are the one penalising any person who intentionally and unlawfully receives unauthorised information, and the provision that gives the police extensive power to search and seize communication equipment.

the founder and Director of JamiiForums, a popular online forum, who has repeatedly been arrested and charged with different offences including obstruction to investigation for refusal to identify anonymous users on JamiiForums who were exposing corruption and other travesties by the people in authority (MCT, 2019a; LHRC, 2018; LHRC, 2019; CIPESA, 2018). The threat of such legal provisions on the freedom of the media and expression have also constrained the activities of civil society and academics. Amnesty International (2019) indicates that the media, bloggers, researchers, and online users are not free to communicate because of fear of reprisals, especially on political issues or issues touching on human rights.

Some of the charges that have been levelled against members of the civil society and academics include defamation on social media, issuing false statistics that violate the Statistics Act, 2015 and the revised Statistics Act (CAP. 315 R.E. 2019), sedition and incitement, circulation of videos considered to be offensive and refusal to identify anonymous users by online platform owners. Amnesty International (2019) reports that the security and safety risks inherent in flouting such omnibus laws have compelled many in the civil society, academia and the media to self-censor the information they share online. This has weakened civic participation by intellectuals and inculcated a culture of self-censorship that is bereft of public intellectual discourse.

Maxence Melo, the founder and Director of JamiiForums, a popular online forum, has repeatedly been arrested and charged with different offences including obstruction to investigation for refusal to identify anonymous users on JamiiForums who were exposing corruption and other travesties by the people in authority (MCT, 2019a; LHRC, 2018; LHRC, 2019; CIPESA, 2018).

Again, the Online Content Regulations, 2020, requiring online content publishers to be licensed by the TCRA and pay necessary application, licensing and annual operation fees (LHRC, 2018, 2019; MCT, 2020) further inhibits citizens' digital rights. The regulation set severe penalties to those contravening these terms with a fine that is not less than five million shillings or imprisonment for a term not less than 12 months or both (URT, 2018). Reports such as LHRC, 2018 and LHRC, 2019, show a number of online communicators have already been affected by these punitive requirements and the ones that have failed to pay the mandatory one million fees for registration have been forced to shut down their businesses.

Overall, the citizen's digital rights are severely limited by a litany of legislations and regulations enacted between 2015 and 2020. These legislations give the establishment the power to militate the use of the digital platforms for mass communication and some of the legislations have punitive operation fees that have pushed many online content publishers out of business. Moreover, citizen rights to freely express their opinions and report malpractices, especially, during the 2020 general elections were violated outside the framework of the law as the establishment interrupted internet services and shut down popular social media sites (Ssessanga, 2020).

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 are 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.

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

The Yearbook on Media Quality in Tanzania has for two consecutive years established that the quality of media reporting in the country is on the lower end in most of the categories observed (Spurk & Katunzi, 2019; Katunzi & Spurk, 2020). Findings show major weaknesses in the way journalists source their stories, with most stories having only one source; in the way figures are used; and in professionalism, including the aspect of giving the right to reply to accused people. Print news stories have had a significant increase in the number of stories with zero sources. TV on the other hand was found to have seen an increase in the number of sources in the news stories while radio saw a decline in the number of stories with two or more sources between 2018 and 2019 (Katunzi & Spurk, 2020). A good score is however observed in terms of comprehensiveness, story structure, and the linking of different parts of a story logically.

The 2019 AMB report mentions lack of fairness in most news reports and analyses, poor representation of the views of sources, and bias against certain political and social groups as other issues in the Tanzanian media landscape. According to the report, news reports and analyses tend to follow the dominant state-led socio-political discourse, with little room for critical appraisals. AMB (2015) indicates that professionalism in the media has declined. In some cases, people do not have timely access to information about important events, and this is partly attributed to the culture of secrecy that is still entrenched in the mind-sets of many Tanzanians. The RSF Media Ownership Monitor showed that access to information was still a problem in the country (RSF, 2018), a situation that denies journalists the opportunity to source for a variety of viewpoints when gathering news.

Spurk and Katunzi (2019) also found that increased

The AMB (2015) estimates that 70 percent of private media houses lack the skills and standards of ethical reporting. The MCT 2017-2018 State of Media Report notes that radio stations often employ non-professionals based solely on the quality of their voices (MCT, 2019a).

access to the internet has had a positive impact on the growth of online and citizen journalism. The MCT's (2016) Code of Ethics for Media Professionals directs media organisations to have a clear distinction between news content and paid content. Editorial policies for some media houses also make such an indication.

Newsroom diversity and diversity in gender subjects in news reports is still an issue as reports indicate that women are still not well captured in the media (MCT, 2017). Additionally, the state broadcaster TBC, which ideally should serve all people, is tightly controlled and acts as the government or the ruling party mouthpiece, thus erasing critical voices (AMB, 2019), a situation that affects content quality as divergent voices and opinions remain limited.

As regards language, Tanzania is a diverse society with more than 120 local languages, but this diversity is not reflected in the media content because the law prohibits broadcasting in local languages. Only a few radio stations have an exemption from the government to broadcast in the local languages of the communities they serve. Thus, although broadcasting services (especially radio) are widely available, there is little language diversity in media content. Literature shows many media outlets deliver their content in Swahili, Tanzania's national language. Swahili newspapers dominate the market compared to English newspapers. Television and radio programs are also in Swahili, except for a few programs that target the elite class and diplomats (MCT, 2017; MCT, 2019b; RSF, 2018).

5.2 Journalism Expertise

Lack of professionalism has been pointed out as a major problem behind poor quality of media content, and this results from lack of skills, poor academic qualifications and low pay. Tanzania Media Foundation in its Strategic Plan (2015-2018) attributes the low capacity of Tanzanian journalists to the education system, which does not offer journalism students enough practical lessons, a situation that has seen most of the graduates enter the job market with a dearth of practical skills (TMF, 2015). The AMB (2015) estimates that 70 percent of private media houses lack the skills and standards of ethical reporting. The MCT 2017-2018 State of Media Report notes that radio stations often employ non-professionals based solely on the quality of their voices (MCT, 2019a).

Some media organisations in Tanzania are facing financial constraints to the extent of laying off their employees, and the situation is worse with community radios (AMB, 2015; MCT, 2017; MCT, 2019b). Up to 80 percent of the country's journalists work as freelancers who earn very little for the media work they do. Many only write reports about organisations or events, if they are paid to do so by their sources. Even journalists in full-time employment at media houses are susceptible to this syndrome because their working conditions and remuneration are poor (AMB, 2015). Only a few news organisations have "policies that require journalists to declare gifts and other favours they receive from

news sources," but this is not strictly enforced (AMB, 2019, p. 49).

Different training is undertaken to broaden journalists' understanding of the media legal regime and on how to protect themselves against legal battles they are facing. A number of journalists have enrolled in universities and colleges to meet the professional requirement of the law, as stipulated in the Media Service Act of 2016 and Media Service Regulations, which require, at a very minimum, a diploma to qualify for registration as a practicing journalist. Organisations such as TMF are dedicated to supporting journalists and the media produce independent and quality content that serves public interest while Tanzania Union of Journalists (TUJ) and the MCT protect the interest of journalism and support professionalism respectively. Others like Media Space, Tanzania are involved in media innovation and supporting of free and responsible media landscape.

5.3 News Media Ownership

Only a few media companies have a strong market position and, thus, a potentially high level of influence on public opinion in Tanzania. Whereas in theory the regulatory framework should safeguard media pluralism and prevent media concentration, there are considerable gaps in practice (RSF, 2018). Individuals, private companies, government and political parties are still major media owners. The RSF report shows that the print market in Tanzania is concentrated around Mwananchi Communication Limited (MCL), a subsidiary of the Nation Media Group (NMG), and by far the most dominant market player in terms of readership. Other proprietors are; the IPP Media Group, a private enterprise associated with the late Reginald Mengi; New Habari (2006) Limited, associated with the politician and businessman Rostam Aziz; and the state-run Tanzania Standard Newspapers (TSN) (RSF, 2018). Some are owned by political parties or politicians and Uhuru Media Groups, for instance is owned by the ruling CCM while Tanzania Daima is associated with opposition party CHADEMA leadership through proxies (RSF, 2018). The RSF reports that the media market concentration based on market shares could not be computed. While the Business Registrations and Licensing Agency (BRELA) provides access to some ownership data, financial data (revenue, advertising etc.) were not available a) per media company b) as market share and c) for the media sector (RSF, 2018).

The RSF report shows that the print market in Tanzania is concentrated around Mwananchi Communication Limited (MCL), a subsidiary of the Nation Media Group (NMG), and by far the most dominant market player in terms of readership. Other proprietors are; the IPP Media Group, a private enterprise associated with the late Reginald Mengi; New Habari (2006) Limited, associated with the politician and businessman Rostam Aziz; and the state-run Tanzania Standard Newspapers (TSN) (RSF, 2018). Some are owned by political parties or politicians and Uhuru Media Groups, for instance is owned by the ruling CCM while Tanzania Daima is associated with opposition party CHADEMA leadership through proxies (RSF, 2018).

Interference of editorial content by media owners is very common in Tanzania and is dependent on the type of ownership. Critics decry the negative influence of some owners, arguing that owners with personal agendas, including politically related agenda manipulate the content of their media outlets to suit their own interests (MCT, 2020). Mechanisms to ensure owners use their media outlets for the purpose stipulated in their editorial policies have been recommended, as well as institution of strict measures to ensure owners do not interfere with or influence editorial work to suit their personal interests (MCT, 2019b).

5.4 News Media Organisations' Business Structures and Competencies

On business structure, the State of the Media Report (MCT, 2019) indicates that some media houses have business plans. Integration of newsrooms to conform to digital requirements, coming up with online versions of the newspapers, and launching apps targeting different markets to ensure provision of what consumers are looking for, are some strategies media houses are taking. However, some media organisations lack sustainable business models, which has resulted in financial struggles including being unable to meet remuneration obligations towards journalists (AMB, 2015).

News media organisations (NMOs) have guiding documents that stipulate and standardise the general terms and conditions for advertising and other revenue generating services including price lists, contracts and rate cards. Editorial policies for various media houses indicate how their outlets separate editorial and advertisements. The code of ethics for media professionals (MCT, 2016) also directs the media to do the same.

Literature reveals deep divisions in the focus of reporting in Tanzanian media with regard to

On business structure, the State of the Media Report (MCT, 2019) indicates that some media houses have business plans. Integration of newsrooms to conform to digital requirements, coming up with online versions of the newspapers, and launching apps targeting different markets to ensure provision of what consumers are looking for, are some strategies media houses are taking.

Journalists blame low standards and poor performance on the pressure of deadlines and a lack of robust quality-control systems within newsrooms. In their view, layoffs and restructuring have reduced the number of experienced journalists, making it easy for errors to go unnoticed. They also attribute poor standards to the lack of enough pool of editors, who used to filter unsuitable content (MCT, 2016).

competencies. News reports and analyses from state-owned media, unlike the commercial and private media, tend to follow the dominant state-led social-political discourse with little room for critical appraisals. Journalists blame low standards and poor performance on the pressure of deadlines and a lack of robust quality-control systems within newsrooms. In their view, layoffs and restructuring have reduced the number of experienced journalists, making it easy for errors to go unnoticed. They also attribute poor standards to the lack of enough pool of editors, who used to filter unsuitable content (MCT, 2016).

5.5 Business Expertise

NMOs in Tanzania are not always able to hire staff with management knowledge and skills (finance, marketing, sales, etc.). Some media houses, especially community- owned radios, have shortages of human resources including those in managerial positions, a problem attributed to financial barriers. The most experienced personnel opt for the more attractive remuneration offered by commercial radio stations. As a result, the smaller stations are unable to retain qualified people who can come up with new strategies and initiatives to help the stations grow (MCT, 2017).

State of the media reports (MCT, 2017, 2019b) on 'media development support' indicate that although there are various institutions supporting the media, the kind of training provided cannot help the media to become independent and sustainable. The reports also stress the importance of including women in training and other capacity-building opportunities. The reports recommend in-house training as an approach that can equip many journalists with professional skills and make media houses economically viable. In March 2020, TMF launched a Media Viability Consultancy Program seeking to provide such in-house organisational development support specifically to smaller and medium-sized media houses (TMF, 2020).

Conclusion

As is true across the globe, the viability of Tanzania's news media is threatened by numerous factors including declining advertising revenue, rapid advances in digital technologies that have brought more competition for audiences' attention, and the attendant high costs of investing in such technology. News media organisations (NMOs) in the country face obstacles in producing high-quality journalism from external factors such as political, economic and social conditions in the near term.

The country's NMOs operate in a political, economic and legal environment that is challenging to media freedom. In recent years especially, NMOs have been subjected to significant restrictions on access to information and freedom of expression, including direct threats on individual journalists and suspension of NMOs that do not adhere to licensing protocols for online publishing of content. Audiences and users are also impacted by the constraints on access to information, much as a fairly significant percentage of Tanzanians appear to be in support of the government regulation of the media, especially on too much negative reporting.

The Fifth Government under late President John Pombe Magufuli (2015-2021) tended towards greater constriction of public debates, and journalists still struggle to get opinions from sources, a situation that has led to stories that are either not sourced or single sourced. However, the political environment militated by state power has not stopped several media houses, professional organisations, civil society and human rights organisations from continuing to seek expansion of the civic space and individual civil liberties, including the rights of journalists. With a new government regime in 2021, it is instructive to closely follow the media landscape in Tanzania and how the political, legal and regulatory environment will develop as the new political leadership takes shape.

The economic viability of Tanzania's news media is impacted by declining advertising revenue, with only a few media houses diversifying revenue streams away from traditional advertising models. At the same time, a prohibitive price entry point for investors in the media industry, as well as limitations on foreign-held investment, has meant that privately run media enterprises are hardly able to compete with government-subsidized outlets. This underlines the need for business strategy diversification. Newspapers and digital media are still the most expensive to access for audiences, leaving legacy broadcast media - specifically radio - firmly in the lead in terms of popularity and ease of access. Given that the country moved up to lower middle-income status in 2020, going forward the population may possess more disposable income to access a variety of media platforms, though this remains to be seen.

Tanzania is a stable country in terms of social cohesion, with citizens' unity enhanced by a national language that has superseded local languages. This means that media content is not available in local languages, which may be considered minority languages, but it has also minimised the possibility of divisions among the population along ethnic lines. Media literacy is comparatively low, with important differences in information access, based on rural-urban divides. Similar to the global trend, there is declining trust in media, with digital platforms less trusted than legacy ones. Audiences and users in Tanzania however actively participate in public

debates aired on radio and television and where possible digital outlets, pointing to an increasingly high level of citizenship and a population that is ready to engage with issues that affect them.

Audiences and media houses, especially in the rural areas, face uneven access to digital technologies. Digital rights also continue to be curtailed by government internet shutdowns and social media taxation policies, thus affecting the possibility of robust and effective citizen participation. Costs have meant that many small media houses have held back from investing in updated technology, while skill gaps constrain journalists from leveraging on the capabilities of digital platforms. These skill gaps have also contributed to the phenomenon of low-quality content, characterized by biased reporting and little coverage of minority viewpoints. Limited skill transfers in journalism education, editorial interference by owners, lean and low-skilled newsrooms and a lack of sustainable business models leaving media open to pressure by financiers, have all contributed to low content quality. All these point to the need to enhance journalism and business strategy education and to work towards more diversity in newsrooms.

An independent, strong and vibrant media industry that focuses on serving as a public watchdog on government and businesses for the greater good of the society has long been recognized as a key contributor to a strong democracy, sustained economic growth and protection of both individual and collective rights. Understanding trends in the larger environment in which Tanzanian news media operate is critical to helping policy makers, industry leaders and journalists identify gaps in policy and socio-political and economic frameworks that can be addressed to create pathways for building viable and independent media industry. This report offers a contribution to that effort.

References

Access to Information Act. (2016). Available at *https://mct.or.tz/wp-content/uploads/2020/06/Access-to-Information-Act-No-6-of-2016.pdf* (Accessed: 23 August 2020).

AMB. (2019). *African Media Barometer: A Home-grown Analysis of the Media Landscape in Africa - Tanzania 2019*. Windhoek: Friedrich-Ebert-Stiftung (FES). Retrieved from *https://tanzania.fes.de/fileadmin/user_upload/Tanzania_AMB_2019.pdf*

AMB. (2015). *African Media Barometer: A Home-grown Analysis of the Media Landscape in Africa - Tanzania 2019*. Windhoek: Friedrich-Ebert-Stiftung (FES). Retrieved from *http://library.fes.de/pdf-files/bueros/africa-media/11676.pdf*

Amnesty International. (2019). *The Price we pay: Targeted for Dissent by Tanzanian State.* London: Amnesty International.

Article 19. (2021, January 11). Tanzania: Online Content Regulations 2020 extremely problematic in the context of COVID-19 pandemic. Retrieved June 2, 2021, from *https://www.article19.org/resources/tanzania-online-content-regulations-problematic-covid-19-pandemic/*

Boitnott, J. (2015). *Tech is Changing the Way We Get our News, and It's Not Stopping.* Retrieved from *https://www.inc.com/john-boitnott/tech-is-changing-the-way-we-get-our-news-and-it-s-not-stopping.html*

Canares, M. and Thakur, D. (2019). Who wins? Who loses? Understanding women's experiences of social media taxation in East and Southern Africa. Washington DC. Alliance for Affordable Internet.

CIPESA. (2018). *State of Internet Freedom in Africa 2018. Privacy and Data Protection in the Digital Era: Challenges and Trends in Africa. Kampala: CIPESA*. Retrieved August 1, 2020, from *https://cipesa.org/?wpfb_dl=278*

Columbia Global Freedom of Expression. (2019). *Media Council of Tanzania v Attorney General.* Retrieved from *https://globalfreedomofexpression.columbia.edu/cases/media-council-of-tanzania-v-attorney-general/*

Cybercrimes Act. (2015). Available at *https://rsf.org/sites/default/files/the_cyber_crime_act_2015.pdf* (Accessed: 23 August 2020).

Electronic and Postal Communications (Online Content) Regulations. (2020). Available at *https://www.tcra.go.tz/document/The%20Electronic%20and%20Postal%20Communications%20(Online%20Content)%20Regulations,%202020* (Accessed: 18 November 2020)

ESRF. (2018). *Tanzania Human Development Report 2017: Social Policy in the Context of Economic Transformation.* Dar-Es-Salaam/Dodoma: Economic and Social Research Foundation; United Nations Development Programme, Tanzania; Government of the United Republic of Tanzania.

FES. (2018). *Independent Media and Freedom of Expression.* Retrieved August 12, 2020, from *https://tanzania.fes.de/topics/independent-media-and-freedom-of-expression*

Freedom House. (2020). *Tanzania Country Report on the Freedom of the Press.* Retrieved July 6, 2020, from *https://freedomhouse.org/*

Hussein, S. A. (2015). *Print journalists' attitude towards citizen journalism in Tanzania.* University of Dar es Salaam.

Gicheru, C.W. (2014). *Challenges facing independent newspapers in Sub-Saharan Africa*, University of Oxford.

Internet World Stats. (2020). *World Internet Users: Usage and Population Statistics.* Retrieved April 20, 2021, from Africa Internet Users, 2021 Population and Facebook Statistics (*internetworldstats.com*)

Katunzi, A. & Spurk, C. (2020): *Yearbook on Media Quality in Tanzania 2019, Report*. Dar es Salaam: University of Dar es Salaam School of Journalism and Mass Communication.

Klomsri, T. & Tedre, M. (2016). Poor Information Literacy Skills and Practices as Barriers to Academic Performance: A Mixed Methods Study of the University of Dar es Salaam. *Reference & User Services Quarterly.* Vol. 55 (4), pp. 293–305.

LHRC. (2017). *Tanzania Human Rights Report.* Dar es Salaam.

LHRC. (2018). *Tanzania Human Rights Report.* Dar es Salaam.

LHRC. (2019). *Tanzania Human Rights Report* (Jan – June 2019). Dar es Salaam.

LHRC. (2020). *Tanzania Human Rights Report* (March, 2020). Dar es Salaam.

Mbogo, A. (2020, September 23). Afritech News. Retrieved June 3, 2021, from JamiiForums: Meet East Africa's Homegrown Social Media Network: *https://afritechnews.com/jamiiforums/*

MCT. (2014). *Code of Ethics for Media Professionals*. Dar es Salaam.

MCT. (2015). *Elections Media Monitoring Report*. Dar es Salaam.

MCT. (2015). *Press Freedom Violations Register Report*. Dar es Salaam.

MCT. (2016). *Code of Ethics for Media Professionals. Media Council of Tanzania.* Retrieved November 21, 2020, from *https://mct.or.tz/wp-content/uploads/2019/05/MCT-Code-of-ethics.pdf*

MCT. (2017). *State of the Media Report*, 2016. Dar es Salaam.

MCT. (2018). *Press Freedom Violations Register Report (Jan – June 2018)*. Dar es Salaam.

MCT. (2019a). *Press Freedom Violations Register Report (Jan – June 2018)*. Dar es Salaam.

MCT. (2019b). *State of the Media Report, 2017-2018.* Dar es Salaam.

MCT. (2020). Analysis of the Electronic and Postal Communications (Online Content) Regulations, 2020. Retrieved June 02, 2021, from *https://mct.or.tz/wp-content/uploads/2020/08/EPOCA-Online-Content-Regulations-2020-Analysis.pdf*

Media Services Act (2016). Available at *http://acme-ug.org/wp-content/uploads/1481107152-Media-Service-Act-20161.pdf*. (Accessed: 23 August 2020).

Media Services Regulation. (2017). Available at *https://crm.misa.org/upload/web/1486380177-g-n-media-services-regulations-gn-18-3-02-2017.pdf-2-1.pdf*. (Accessed: 23 August 2020).

MISA. (2019). *Freedom of Expression Defilements in Tanzania: Analytical Report 2017-2019.* Retrieved from *https://crm.misa.org/upload/web/misa-tan-report-on-media-freedom.pdf*

Mukendi, A. (n.d.). *Citizen Journalism Africa Project.* Retrieved February 10, 2021, from *http://genderlinks.org.za/wp-content/uploads/imported/articles/attachments/12174_mukendi_ctizen-journalism-africa.pdf*

Ng'wanakilala, F. (2019, July 11). *Tanzania says does not know whether missing journalist is dead or alive.* Reuters. Retrieved April 10, 2020, from *https://www.reuters.com/article/us-tanzania-media-idUSKCN1U61NO*

Ng`wanakilala, N. (1981). *Mass Communication and Development of Socialism in Tanzania,* Dar es Salaam, Tanzania Publishing House.

Political Parties (Amendment) Act (2019). Available at *https://www.osg.go.tz/uploads/publications/sw1570617533-1.%20THE%20POLITICAL%20PARTIES%20(AMENDMENT)%20ACT,%202018%20%204%20FEBRUARI,%202019%20FINAL%2026TH%20FEBRUARY%202019.pdf*. (Accessed: 23 January 2021).

Powell, R. (2017). Unfinished business: Tanzania's media capture challenge. In A. Schiffrin, *In the Service of Power: Media Capture and the Threat to Democracy* (pp. 83-96). Washington, DC: Center for International Media Assistance.

Public Media Alliance. (2020). *Tanzania: Regulator poses tighter restrictions on media.* Retrieved from *https://www.publicmediaalliance.org/tanzania-regulator-poses-tighter-restrictions-on-media/*

RSF (2020). *World Press Freedom Index.* Retrieved November 01, 2020 from *https://rsf.org/en/tanzania*

RSF. (2018, November 15). *Media Ownership Monitor: Who owns the Media in Tanzania?* Retrieved November 20, 2020, from *https://rsf.org/en/reports/who-owns-media-tanzania*

Schiffrin, A. (2017). *Bridging the Gap: Rebuilding Citizen Trust in Media.* Centre for International Media Assistance (CIMA). Retrieved December 21, 2020 from *https://www.cima.ned.org/blog/bridging-gap-rebuilding-citizen-trust-media/*

Spurk, C. & Katunzi, A. (2019). *Yearbook on Media Quality in Tanzania 2018, synthesised report on overall results*, Dar es Salaam: Media Council of Tanzania and Spurk Media Consulting Ltd.

State of Internet Freedom in Africa. (2018). *Privacy and Data Protection in the Digital Era: Challenges and Trends in Africa.* Retrieved from *https://cipesa.org/?wpfb_dl=278*

Statistics Act. (2015). Available at *http://parliament.go.tz/polis/uploads/bills/acts/1452062087-ActNo-9-2015-Book-1-10.pdf*

Statistics Act. (2019). (CAP. R.E. 315 2019). Retrieved from *http://parliament.go.tz/polis/uploads/bills/acts/1452062087-ActNo-9-2015-Book-1-10.pdf*. (Accessed: 23 January 2021).

Sturmer, M. (1998). *The media history of Tanzania.* Mtwara: Ndanda Mission Press.

TCRA. (2020). *Tanzania Communications Regulatory Authority report of September 2019.* Retrieved December 16, 2020 from *https://www.tcra.go.tz/statistic/2020%20Quarterly%20Statistics%20Reports/september*

TCRA. (2017). *Tanzania Communications Regulatory Authority report of December 2017.* Retrieved December 16, 2020, from *https://www.tcra.go.tz/statistic/2017%20Quarterly%20Statistics%20Reports/december*

TCRA. (2017). Communications Statistics report of December. Dar es Salaam.

TCRA. (2018). Communications Statistics report of September. Dar es Salaam.

TCRA. (2020). Communications Statistics report of March, 2020. Dar es Salaam.

The Citizen. (2020, October 13). *Facebook to promote election integrity ahead of Tanzania's October Polls.* Retrieved May 22, 2021, from *https://www.thecitizen.co.tz/news/Facebook-to-promote-election-integrity-ahead-of-Tanzania-s-/1840340-5631554-ni2avmz/index.html?fbclid=IwAR1o05LkuEVEruBDxNFCQsW-u3GpXE9d9R7BwL8IqbrW3aTJ62q47Ng035E*

The Constitution of the United Republic of Tanzania [United Republic of Tanzania], 1977. Retrieved January 21, 2021, from *https://rsf.org/sites/default/files/constitution.pdf*

THRDC. (2018). *Report on the Situation of Human Rights Defenders and Civic Space in Tanzania, 2018.* Dar es Salaam.

TMF. (2015). *TMF 2015 – 2018 Strategy: Strengthening media for accountability.* TMF. Retrieved January 21, 2021 from *https://www.tmf.or.tz/images/151222_TMF-Strategic-Plan.pdf*

TMF. (2016). *Baseline Community and Decision Maker Media Perception Survey. Tanzania Media Foundation and Ipsos Synovate.* Retrieved January 21, 2021, from *https://www.tmf.or.tz/images/121222-TMF-Baseline-Survey-Report-1.0.pdf*

TMF. (2021). *Sign up to benefit from free media viability consultation and advisory services.* Retrieved May 27, 2021, from *http://www.tmf.or.tz/calls-for-bids/252-sign-up-to-benefit-from-free-media-viability-consultation-and-advisory-services.html*

Trade and Investment Global Practice, Africa Region. (2020). *Tanzania Economic Update: Addressing the Impact of COVID-19 with a Special Section on the Role of ICT.* The World Bank Group Macroeconomics.

Twaweza. (2017a). *Input to Regulations for Implementation of the Media Services Act, Number 12 of 2016.* Dar es Salaam: Twaweza. Retrieved July 2020, 23, from *https://www.twaweza.org/uploads/files/Twaweza%20input%20to%20MSA%20regulations.pdf*

Twaweza. (2017b). *Protecting Journalists and the Media: East African Citizens views on Media Freedom.* East African Countries Survey. Dar es Salaam: Twaweza. Retrieved July 2020, 23 from *https://www.twaweza.org/go/protecting-journalists-and-the-media*

URT. (2018). *The Criminal Procedure Act.* Dar es Salaam. Retrieved from *https://www.tanzania.go.tz/egov_uploads/documents/CRIMINAL%20PROCEDURE%20ACT.pdf*

Wangari, N. (2017 September, 11). GeoPoll's Media Ratings *Methodology: Adherence to The Statistics Law of Tanzania.* GeoPoll. Retrieved October 15, 2020, from *https://www.geopoll.com/blog/geopolls-media-ratings-methodology-adherence-to-the-statistics-law-of-tanzania/*

WJP. (2020). Rule of Law Index. Washington, D.C: World Justice Project. Retrieved November 13, 2020, from *https://worldjusticeproject.org/sites/default/files/documents/Tanzania%20-%202020%20WJP%20Rule%20of%20Law%20Index%20Country%20Press%20Release.pdf*

World Bank. (2015). *Literacy Rate, adult total (% of people age 15 and above) – Tanzania.* Retrieved October 13, 2020, from *https://data.worldbank.org/indicator/SE.ADT.LITR.ZS?locations=TZ*

World Bank. (2020). *The World Bank Data: Tanzania. World Bank.* Retrieved from *https://data.worldbank.org/country/TZ*

Zelezny-Green, R., Vosloo, S., & Conole, G. (2018). *Digital Inclusion for Low-skilled and Low-literate People: A Landscape Review*. (S. Curran, Ed.) Paris: UNESCO. Retrieved November 20, 2020, from *https://unesdoc.unesco.org/ark:/48223/pf0000261791*