Media Pluralism Landscape

An Overview of the Media Sector in Mozambique

Final Report

Prepared for UNESCO/UNDP Media Development Project
By Marie-Hélène Bonin, Nordic-SADC Journalism Centre

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A study carried out by

Marie-Hélène Bonin, NSJ Centre

In collaboration with

Nelia Taimo
Salomão Duma Cumbane
Nazário Muchanga
António Rodriguês
Marina Canothilo
Dionísio Quelhas (Gestinform)
Ambrósio Cuahela (Gestinform)
Naftal Donaldo
Domingos Fernando (Gestinform)
Bonifácio José (Gestinform)
Agostinho Manganhela
Simão Mataruca (Gestinform)
Alexandre Mate

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List of abbreviations used in this report

- **ICS :** Instituto de Comunicação Social
- **INDER :** Instituto Nacional para o Desenvolvimento Rural
- **NSJC :** Nordic-SADC Journalism Centre
- **RC :** Rádio Comunitária
- **RM :** Rádio Moçambique
- **RTP :** Rádio e Teledifusão Portuguesa
- **TVM :** Televisão de Moçambique
- **UNESCO :** United Nations Educational, Scientific and Cultural Organisation
- **UNDP :** United Nations Development Programme (or *PNUD*)
- **UNFPA :** United Nations Fund for Population Activities (or *FUNAP*)

TERMS

Definition of core terminology

Terms as defined for the purposes of this study

Media

Media (A)

For the purpose of this study, a media here refers to any of the following means that permits the communication of information: print media, radio broadcasting, television broadcasting, video producing.

Media (The)

See below Media Sector.

Media organisations *surveyed* and *not surveyed*

Nearly all media organisations existing in Mozambique were surveyed for this study. They include media operations and media projects, but a few were excluded.

Media operations

These include all media actually publishing or broadcasting in Mozambique contents that they also produce in Mozambique. These therefore exclude all foreign radio and television broadcasters (such as RFI, BBC, etc.) that only retransmit in Mozambique – the only exception being RTP television that has local production and broadcasting installations and that produces local contents. These also exclude national print media delegations that provide local correspondents but do not produce a different provincial edition of their respective newspapers. In the case of national radio and TV broadcasters, most delegations were surveyed as these stations do produce and broadcast different provincial programming than that of the national stations. The only unclear case is that of *RM Interprovincial* in Gaza that was surveyed although its actual activity does not seem to fit this definition.

Media projects

These include all media not yet publishing or broadcasting that could actually hand-over a written project document or answer to most project-relevant interview questions. These therefore exclude all «ideas for a project» which have not yet been developed or that could have emerged while the field researcher visited their locality of origin.

Media organisations surveyed

Media organisations referred to as being 'surveyed' are only those that were registered, interviewed and included to the data processing and analysis leading to this report. These are 111 in total (in operation or in project) and are the only ones included to the tables shown in this report.

Media organisations *not* surveyed

Inasmuch as possible, all media operations and projects were registered, interviewed and included to this report. However, there are five media operations that existed during the surveyed period that are not included to those referred to in this report as 'media surveyed.' Three of these could not be interviewed (*RM Cabo Delgado*, *RM External Service* in English, and the newspaper *O Amanha* in Matola). There are also two media organisations that were interviewed but following their interview the data could not be processed, analysed and included to this report (*AIM* and *RM Manica,* please refer to page 37).

Several projects were also not surveyed nor interviewed, either because they are unknown, could not be found or contacted, or for other reasons. Some of these projects came to operation after the field research period and include *TVM Cabo Delgado*, *TVM Zambezia*, *TV Cabo Moçambique*, and the new newspaper *Amanhecer* in Lichinga (not to be confounded with *Faisca*, also from Lichinga, published by Amanhecer Coop).

Please note that all media operations and projects that were not surveyed are not included to this report and the tables it contains. Some information on these can however be found in the annexed Mozambique Media Directory.

Sectors

Media sector (The)

Refers to the sum of all media organisations as described above under a Media, in Mozambique.

Media sectors

May refer to any of three different kinds of sectors and/or their respective sub-sectors: Media Nature, Typology and Ownership.

1) Sectors referring to the *Nature* of the medium are the print sector (see Print Media below) and broadcasting sector (radio, television and video).

2) Sectors referring to the *Type* of media are the various sub-sectors used as the main variable in most of the information treated in this study. These include, for instance, the daily, weekly and other periodicity newspapers, the fax and email media, the public, religious, commercial and community radio stations, etc. Their respective definitions follow.

3) Sectors referring to *Ownership* are the public sector and private (or independent) sector. Both the public and private sectors may include mix

enterprises and commercial or non-profit entities. These sectors are defined further bellow.

Nature of media

Print media

Refers to any periodical written publishing, including paper printed media (newspaper, magazine, newsletter, etc.), faxed media (most commonly daily or weekly A4 newspaper), and electronic media (through Web Page or Email).

Broadcast media

For the purpose of this study, broadcast media includes radio broadcasting, television broadcasting and video production independent from television broadcasters.

Type of media

Typology

A wide range of media categories were enumerated in all interviews by field researchers and respondents were invited to indicate to which category does their media operation or project belong. The author of this study did not modify the categorisation proposed by respondents, even when it could be disputable, unless the respondents selected two categories. In this case the methodology used demanded that a unique category be used and adjustments were made.

These categories have been used to classify the types of media for the purpose of this study and used as base variables listed in the left column of most tables. Their definitions are described below under Categories.

Categories

1) **Daily newspaper:** traditional ones and A4 format printed dailies.

2) **Weekly newspaper:** traditional ones and A4 format printed weeklies.

3) **Other newspaper:** traditional ones and A4 format printed whose periodicity is neither daily nor weekly, such as twice a week, fortnightly, monthly, quarterly.

4) **Newsletter:** of any periodicity, the respondents interviewed distinguished these from A4 format printed newspapers according to contents or readership criteria.

5) **Magazine:** traditional ones in various format.

6) **Email media:** these are email or Internet newspapers that has chosen to describe themselves as 'other print media' (see below) when the category 'email media' was not offered to them in interview.

7) **Other print media:** no other print media were found in Mozambique other than email or Internet newspapers that had also indicated that they circulated mainly through email and Internet (see above).

8) **Daily fax:** A4 format faxed dailies.

9) **Weekly fax:** A4 format faxed weeklies. None were found in Mozambique, although some printed A4 weeklies are also partially sold by fax – but mainly not.

10) **Other fax:** A4 format faxed media of other periodicity (as other newspapers).

11) **Public radio:** national, provincial or foreign public (state-owned) radio broadcasters. Two were not surveyed and one in Gaza could have been excluded (please refer to Media Organisations surveyed and not surveyed on pages 15 and 16).

12) **Commercial radio:** national, provincial or foreign private radio broadcasters with commercial purposes.

13) **Religious radio:** national, provincial or foreign radio broadcasters owned by private religious entities.

14) **Community radio:** district-based radio broadcasters owned by public or private entities with community development purposes.

15) **Political party radio:** national or provincial radio broadcasters owned by political parties that had chosen to describe themselves as 'other radio' (see below) when the category 'political party radio' was not offered to them in interview.

16) **Other radio:** no other radio were found in this category in Mozambique, other than one radio that indicated that it is owned by a political party (see above).

17) **Public television:** national, provincial or foreign public (or state-owned) television broadcasters.

18) **Commercial television:** national, provincial or foreign private television broadcasters with commercial purposes.

19) **Religious television:** national, provincial or foreign television broadcasters owned by private religious entities.

20) **Community television:** television broadcasters owned by public or private entities with community development purposes. None were found in Mozambique.

21) **Other television:** None were found in Mozambique.

22) **Video advertising producer:** video production houses, independent from television broadcasters, specialising in the production of television adverts.

23) **Music video producer:** video production houses, independent from television broadcasters, specialising in the production of music entertainment videos. None were found in Mozambique.

24) **Documentary video producer:** video production houses, independent from television broadcasters, specialising in the production of documentary videos.

25) **Various videos (producer of):** video production house, independent from television broadcasters, involved in the production of various kinds of video productions as described above.

26) **Multimedia:** projects that contemplate the creation of media operations in at least two of the following sectors: print, radio, television, video production.

Ownership

Public sector

Refers the print or broadcast media owned in majority by the State, for commercial or non-profit purposes.

Private or Independent sector

Refers to the print or broadcast media controlled in majority by legal entities independent from the State, for commercial or non-profit purposes.

Purposes

Commercial purposes

A media with commercial purposes refers to a profit-driven media enterprise whose activities ultimately aim at generating a profit (earned income – see below – in excess of expenditure that is not necessarily reinvested in the enterprise). This profit may be paid out to its owner or shareholders as is the case for any other commercial business, or members as in the case of a commercial co-operative, or foreign headquarters as in the case subsidiaries.

Non-profit purposes

A media with non-profit purposes refers to a media enterprise whose income, self-generated through earned income activities (see below) or funding from donors or benefactors, are used to sustain the enterprise or reinvested in its growth, rather than transferred to its 'owners' as in the case of commercial media.

Community development purposes

A media with community development purposes may be a media enterprise owned in majority by the State or legal entities independent from the State (Churches, associations, NGOs). Community medias' mission and publishing/programming contents include a deliberate and prioritised aim at supporting (or even possibly generating) community development, at local, district regional or sector level, through communication and information activities. The community may be defined geographically or as a community of interest (ex.: women's magazine). As this community development aim, when prioritised, may

enter in conflict of interest with the aim of generating profit, these media usually have non-profit purposes.

Sustainability-related concepts

Sustainability

Sustainability refers to "***the ability of an organisation to secure and manage sufficient resources to enable it to fulfil its mission effectively and consistently over time without excessive dependence on any single funding source***. […] Sustainable organisations have, at minimum: *a clear mission and strategic direction;* the *skills to attract resources* from a variety of local, national and international sources and the *know-how to manage them efficiently* […]." (Lisa Cannon, Life Beyond Aid, 1999).

Clear Mission and Strategic Direction

In this study, media organisations' clarity of mission and strategic direction was assessed through their ability to describe their editorial policy (including mission, means to achieve it, political and ethical stands, contents focus, target audience) and their strategic and development plans.

Sufficient resources

The sufficient resources referred to in the above definition of sustainability include all minimum requirements in terms of finances, skilled human resources, functional equipment and adequate physical space. In some cases, other factors may be required. In all cases, these resources may be secured simply through sufficient finances, in other cases they may require exchanges of services, volunteering, grants or donations, loans, sharing of infrastructures, etc.

Self-financing or self-reliance

An entirely self-financing or self-reliant media is a sustainable media that no longer requires donor or benefactor funds because it is financed completely from earned income. Most sustainable media organisations aim to increase their level of earned income (see below) to become self-financing.

Self-generated income

A self-generated income is mobilised by an organisation, rather than automatically granted, through earned income activities and/or donors and benefactors funding. A public institution annually financed by a national budget allocation is not self-generating its income, unless it mobilises other earned or funding income.

Earned income

All earned income is self-generated through activities that bring income to an organisation, including sales, advertising, advert-reporting, commissioned programmes, fees from consulting, service providing, equipment or space hiring, other business activities, or investments. Donors funding do not constitute earned income. Donors commissioned work do.

MAP

Map of Mozambique

Sites visited by the research team

Executive Summary

Media pluralism landscape study

Objective

This study is to provide an overview of media assets, potentials and needs in Mozambique. The study's aim is also to serve as a guide for project decisions on how to best assure the further strengthening of media pluralism in the country, along the lines of the set outputs and prepared work plan of the UNESCO/UNDP Media Development Project in Mozambique.

To provide information useful to the UNESCO/UNDP objective, the author of this study has chosen to analyse the level of media pluralism in terms of its significance and entrenchment. The significance of media pluralism was therefore analysed through a measurement of media diversity (both at factual and impact levels). The entrenchment of media pluralism was analysed through a measurement of media sustainability (both at vision and resource levels).

Contents of this study

Part one – Media Pluralism : the study

- A Preliminaries Section gathers reference information such as lists of annexes, tables and abbreviations, core terminology definitions, map with research sites and the present executive summary.

- Chapter 1 introduces the study in the context of the UNESCO/UNDP Media Development Project in Mozambique. This project intends, in the provinces, to support new initiatives, establish newsroom and printing facilities and create 10 community radio stations. Nationally, the project aims to train journalists from the independent media and assist *Rádio Moçambique* in its coverage of the whole country. In light of previous studies of the media in Mozambique, the present study's justification is argued in relation to the UNESCO/UNDP project. Finally, the organisation of this report is explained in relation to the study's terms of reference.

- Chapter 2 presents the methodology used for the study and the process leading to this report. These include the conceptual framework developed for the study, deconstructing the concept of pluralism into two determinant dimensions: that of significance, measured through diversity, and that of entrenchment, measured through sustainability. The chapter also explains independence and quality control considerations, the process itself and, ultimately, the strengths and limitations of the study.

Part two – Pluralism Significance: diversity

- Chapter 3 presents the measurement of the degree of media diversity achieved in Mozambique. The chapter offers a register of all media initiatives in the eleven provinces of the country: on-going as well as those under preparation; national as well as provincial or local. The chapter also assesses the level of diversity in terms of types of media, provincial distribution, ownership structure and language used.

- Chapter 4 attempts to measure the actual impact of the media diversity achieved in the country, looking at print media circulation, broadcasting coverage and audience response. The chapter offers an analytical description of the level of information pluralism in each of the ten provinces of the country, identifying where is the population provided with information from different sources so as to facilitate their informed understanding and decision-making.

Part three – Pluralism Entrenchment : sustainability

- Chapter 5 assesses the potential for sustainability of the operational media organisations, in relation to their vision and strategic direction. The chapter looks at the media organisations' ability to describe their editorial policy, targeted audience, strategic plans, development and expansion plans, and adequacy to the legal environment.

- Chapter 6 assesses the potential for sustainability of the operational media organisations, in relation to their ability to secure and manage sufficient resources to execute their vision effectively and consistently over time. The chapter looks at organisational capacity, qualifications and gender of human resources involved, management and financial aspects, technical/equipment assets and needs.

Findings and Recommendations Emerging

Part four – Pluralism Strengthening : perspectives

- Chapter 7 reviews the main findings of this study and proposes recommendations in the areas of actions considered by UNESCO/UNDP terms of reference. These areas include information pluralism, printing press, newsrooms, assistance to new initiatives, community radio and gender imbalance.

- Chapter 8 offers some perspectives for immediate action and the author's conclusions of the study.

1

Introduction

In 1991 a first new democratic Media law was passed in Mozambique, marking a new era in terms of independence and pluralism of the media. A year later the civil war finally ended and a commitment to work towards peace and democracy created space for actually turning some of the aspirations of the new framework into reality.

Looking at the history of Mozambique with years of Portuguese colonialism, a long and tough independence war followed by a long and devastating civil war after only a few years of independent peace, the history of the media in this country is in many ways unique. The destroyed infrastructure of the country and the severe poverty presently means that many areas of the vast country do not receive news and information on a regular basis. The most effective and most widely received medium is the national radio service, *Rádio Moçambique*, which is not even heard everywhere, and in many places only vaguely for an hour or two every day. Newspapers come days, even often weeks late to some of the more distant towns, the rural vicinities of which may not ever receive them.

A project to support the development of independent media

In spite of the open media legislation, the emergence of independent media has in the Mozambican post civil war environment been rather slow. In 1995 UNDP and a number of bilateral donors in collaboration with government decided to create a project to **assist the independence of the media** in general and **the emerging independent media** in particular. 'Strengthening Democracy and Governance through Development of the Media' is the full title of the project, which was finally signed in 1997. With UNDP co-ordinating the funding provided also by Finland, Norway and Ireland, UNESCO implements the project.

The core philosophy of the project is to **further media pluralism** through support to the independent media of the country, **decentralisation** of the media presently primarily based in Maputo and **capacity building** within the press.

These aims are to be supported in the following ways:

- Through support to the emerging independent media initiatives primarily outside of Maputo.
- Newsrooms in the provinces and printing facilities for the independent press.
- Creation of 10 community radios in the provinces.
- Training of journalists from the independent media, public radio and community radio stations. Special attention is given to gender balance.
- Based on an assessment of how the project can assist *Rádio Moçambique* in its wish to cover 100% of the country, the project will fund additional transmitters.

- A feasibility study of the media training in the country will be initiated by the project, based upon which a national policy seminar is foreseen to assist in the formulation of a national media training strategy.

In order to carry out these activities as effectively as possible, the project management team carried out consultations with all major stakeholders and decided to launch the present major 'Media Pluralism Landscape Study'. With a rather detailed Terms of Reference (please refer to Annex 1), the present study aims to present a detailed map of existing media, their strengths and weaknesses in terms of organisational aspects, human resources and technical standard. Furthermore the study maps the information pluralism in the whole country. With this information the project aims to make well-informed decisions on the implementation of the wide-ranging scale of components.

Studying the media in Mozambique

To justify a study of the present size, it has been necessary to look at what other studies existed: was the information needed by the project already available, or would the project really need to carry out the research by itself?

It became evident that existing studies were outdated or outside the project's focus, so a renewed stocktaking and analysis would be needed for project decision-making. Earlier studies included the following ones:

On the history of the media

- *Contribução para a História da Imprensa em Moçambique – Quadros da História da Imprensa de Moçambique*, Ilídio Rocha, head of the BNU Documentation and Information Centre.

- *140 anos de imprensa Mocambicana*, edited by Fátima Ribeiro and António Sopa, AMOLP, Maputo, 1996.

Recent in-depth overviews

- A USAid survey of 1993 on Mozambican Media.

- The Media in Mozambique – an inventory for SIDA by Pamela Rebelo.

- Mozambique 1975-1995. Vinte anos de Communicação Social – Caminhos Percorridos. Juarez da Maia, TSS1 study for UNESCO.

- On the Print Media in Mozambique. Donald S. Palmer, August 1996.

- Media Profile Mozambique. Ulrica Hotopp, December 1997.

- Communications and Culture Programme in Nampula. Iris Imaginações, for the Dutch Embassy in Mozambique, 1998.

- Demographic Health Survey, Washington, 1997.

All of these studies provide a wealth of information on the history and development of the media in Mozambique. From the point of view of implementing the UNESCO/UNDP project, they are, however, all either outdated or too narrow in scope. This new study aims to complement the canvas.

Organisation of the present report

This report offers some of the information collected over the past months. It is in no way exhaustive and is restricted to the information considered useful to the UNESCO/UNDP Media Project as described in the Terms of Reference established for the study (please refer to Annex A for details). The remaining data not treated by the report itself can be found in the annexes and data bank handed over to UNESCO.

The following is a guide to the contents of this study in relation to the Terms of Reference provided by UNESCO/UNDP.

Methodology and Process

With reference to the study's initial work plan and progress report, ***Chapter 2*** provides an update on the methodology used to carry out the study and the process leading to this report.

Four main outcomes were expected from the research team, as outlined by the Terms of Reference, and these are presented in chapters 3 to 7:

Register [of media diversity]

The study was meant to register and assess all media initiatives in the country: ongoing as well as under preparation; national as well as local; professional as well as semi-professional or community-oriented. In the present report, this register forms the ***Chapter 3***.

Analytical description [of diversity]

The study was also to provide an analytical description of the level of information pluralism, in each of the ten provinces of the country. This analysis is offered in ***Chapter 4***.

Assessment [of sustainability potential]

The assessment required of the registered media covers a series of aspects ranging from ownership, management and control, sustainability potential, professional and technical level of human resources, to the available equipment and its level of functionality.

These are presented under the overall concept of Sustainability, as defined in page 24. Following this definition, the sustainability potential of media operations is assessed in relation to their vision and strategic direction in ***Chapter 5***, and to their ability to secure and manage resources to operate effectively and consistently in ***Chapter 6***.

Findings and Recommendations

This report contains the required series of recommendations, based on the main findings from the above, in ***Chapter 7***.

Perspectives and Conclusions

Final observations and suggestions for immediate follow-up action are included to ***Chapter 8***.

2

Methodology and Process

A quantitative and qualitative approach

Conceptual framework

As outlined in the previous page and detailed in Annex A, the terms of reference of this study required that the state of media pluralism in Mozambique be measured in various respects.

To do so, we have attempted to deconstruct the ***concept of pluralism*** into measurable determinants and have opted to focus on its ***significance*** and ***entrenchment***, determinants respectively expressed through the notions of diversity and sustainability. We should state that our approach does not exclude the existence of other pluralism determinants; simply we chose to study these, as they appeared most relevant to the study's objective.

It appeared to us that ***significant media pluralism*** could not be achieved without a certain degree of ***diversity*** in terms of media sectors, geographical distribution, media ownership, language used, and impact. This diversity could be measured quantitatively.

It also seemed clear that ***entrenched media pluralism*** could only be achieved through effective and consistent media operations, i.e. through the ***sustainability*** of media organisations. This sustainability could be measured through a range of qualitative factors.

We have chosen to treat the ***significance of pluralism***, measurable through diversity, registering all media initiatives and projects per sector (as they define themselves) in Chapter 3 and their respective impact measurement (actual coverage and audience response) in Chapter 4.

As for the ***entrenchment of pluralism***, measurable through sustainability, we have assessed it per media operation, at the level of their strategic vision and ability to secure and manage the resources they require to operate effectively and consistently over time. This was analysed and is presented in Chapters 5 and 6.

It appeared to us important, from a methodological perspective, to provide definitions of the terms used in this report, as they carry ***different meaning to different people***. These should be referred to on pages 19 to 24.

Finally, it should be reminded that the information offered here was collected in interviews. It indicates how media organisations ***perceive themselves*** and/or how they ***want to be perceived***. The author offers its comments and analysis of these perceptions but has deliberately avoided to 'correct' the information offered, as it carries in its present form some useful information on the sustainability factors analysed, such as the strategic vision of respondents.

Independence

One essential condition for the success of this study was to ensure the independence, from the existing media operations in the country, of its conceptual framework, methodology, investigative tools, researchers and data treatment process.

In order to ensure the above, the following was established:

- The terms of reference provided by UNESCO were clear, detailed and discussed to avoid any form of preconceived interpretation.

- The thirteen-member team that carried out the research was made up of professionals independent from the media sector, as far as possible. This means that the Senior Researcher, Senior Research Assistant, Technical Experts, Field Research Supervisor and Field Researchers had to be independent from Mozambican media organisations. This was successfully achieved, with two exceptions: One of the field researchers was *Zero*'s director in Maputo and was therefore assigned to the northern provinces to carry out his field research assignment. One of the technical experts was from *Rádio Moçambique* and his assessment of the independent radio stations' equipment required not be controversial with these stations.

- The Senior Researcher opted for an all inclusive survey methodology, rejecting any form of sampling of the media organisations in Mozambique. A listing of media organisations, operational and in the form of project, was established by the Senior Researcher from various sources, then divided up and assigned to Field Researchers.

- The assessment of population's access to various sources of information was carried out through two means. Circulation information was collected from the print sector and broadcast potency from the broadcasting sector, on the one hand. On the other hand, a small audience survey was also carried out in each locality visited by the field researchers, following sample selection criteria pre-established and standardised across the country.

- The treatment of the data collected was carried out through computerised methods by a technical expert, while data crossing, data analysis and recommendations were produced by the Senior Researcher.

Quality control

- The questionnaire used by field researchers to interview all media organisations was carefully designed by the Senior Researcher, MH Bonin, handed-over for comment to UNESCO Media Development Programme Chief Technical Adviser, UNDP Gender Adviser, UNESCO's recommended independent media expert, and all research team members. It was discussed, reviewed and improved during an initial methodological briefing session.

- A pre-test was conducted with the questionnaire before the research began, with three media organisations in Maputo, and the questionnaire was reviewed

following this pre-test, by Senior Researcher MH Bonin and Senior Research Assistant, N Taimo.

- A selection criterion in establishing the research team was that the field research supervisor and the field researchers were to be very familiar with the Mozambican terrain and its research conditions. They were all nationals and most of them had carried out field research previously.

- A three-day initial methodological briefing session was organised before beginning the research, involving all research team members, NSJC representatives, UNESCO's representatives, UNDP Gender Adviser, and UNESCO's recommended independent media expert. The session included contextual briefings, methodological discussions, questionnaire analysis, pre-test and review, and logistical preparation.

- Field researchers were instructed to carry out interviews only with Directors or Editors of media organisations, to avoid any mistake in the information that could have been provided by other members of the organisations, i.e. board or staff members.

- Field researchers and Technical experts were monitored and the Senior Researcher or the Senior Research Assistant stepped in when required.

- Great efforts were deployed to register and interview all media operations and projects. Please refer to page 19 for criteria and definitions of media 'operations' and media 'projects'.

- A newspaper advert was published at the beginning of the fieldwork, inviting all media organisations to enter in contact with the research team, should they have not yet been contacted for an interview. This was meant to avoid that any organisation be left out, should the team have not known any particular organisation or project.

- Media operations and projects not included to this study were therefore left out involuntarily, either because they could not be reached, or were unknown and did not respond to the published advert, or were created after the field research period. (Please refer to page 20).

- In two cases, interviews were conducted but the information collected was not used. In the case of AIM, the national news agency was interviewed but offered unspecific information concerning several publications and services. Unable to separate the collected data per media operation within the organisation, and reluctant to treat a news agency as a multimedia operation, it was decided for methodological reasons to leave it out in order to avoid any undue interpretation. In the case of RM Manica, after the interview was completed the filled-in questionnaire was left with the interviewee to confer and sign it (please see the procedure described below) but the questionnaire was not returned.

- Field Researchers were required to obtain the signature of interviewees on the filled-up questionnaires once the interview was completed, confirming that all information stated was a true reflection of their responses to the questions they were asked.

- Several revisions of the data compiled were carried out to minimise possible errors in the analysis and interpretation. When doubts arose on the basis of apparent contradictions in the compiled information, the Senior researcher

reviewed once more all individual questionnaires, made telephone contacts to ascertain the information and corrections were made thereafter in the data base.

Process

- NSJC obtained this research contract following standard tender procedures in March 1999.

- A research team of 13 people was established by NSJC, in collaboration with and including Mr. Dionisio Quelhas and four associates from Gestinform, a Mozambican enterprise who had also submitted a proposal to UNESCO/UNDP.

- A three-day briefing was organised by NSJC with UNESCO for the team involved, defining and ensuring understanding of the objective, process and methodology of this study.

- The questionnaire was 'workshoped' and put through a pre-test during the briefing session. It was thereafter reviewed. It was reprinted and immediately distributed to the field researchers by D Quelhas (Gestinform), unfortunately without a last revision, which explains the absence of mention of UNESCO/UNDP (and NSJC) on it.

- From the end of March to the beginning of May, seven Mozambican field researchers proceeded to interview over 111 media organisations and projects across the eleven provinces of Mozambique.

- Technical experts, also part of the research team, visited and assessed the technical facilities of 5 Internet providers, 8 printing presses and 18 radio broadcasting installations across the country.

- When meeting the media Editors or Directors, the researchers and technical experts introduced themselves with a credentials letter prepared by Mr. Hubert Charles, Representative of UNESCO, explaining the objective of the study and requesting the media's collaboration.

- As data was collected, Gestinform associates started data programming and inputting from the middle of April to the end of May.

- Due to programming skills constraints this process was interrupted by Senior Researcher MH Bonin and the data was handed-over to programming expert, Mr. Duma at the end of May.

- The new compilation and analysis of the data, conclusions, recommendations and report were therefore developed over the months of June and July 1999.

- A Technical Advisory Committee was invited to (and kindly did) read and comment the draft version of this report. It included Ms Orlanda Mendes, and Messrs. Machado da Graça, António Gumende, Jan Maruis Tillmanns and Eduardo Sitoe.

Strengths

- The research team involved various professionals with a range of skills, with two sociologists familiar with Mozambique and experienced in research and development communication, two statisticians with quantitative research experience in Mozambique, two radio and print technical experts and seven national field researchers, all of which with university academic background.

- The close working relationship among team members also provided a capacity building and skills development opportunity for the print and radio technical experts who had no research experience and for most of the Gestinform researchers who had experience in other types of research.

Limitations

- Unavailability of contact addresses or phone numbers have limited the number of unknown but registered media organisations surveyed, considered inoperative.

- Budgetary, time and language constraints impacted on the selection of technical experts.

- The size of the questionnaire (25 pages) required long interviews and impacted on the attention span of interviewees.

- Skills' constraints forced changes in the team composition during the last phase of the research (data processing) and impacted considerably on the time available for data analysis.

- Time constraints impacted on the extent to which the new data processing expert has used the abundant data collected. More time would have permitted more cross analysis of the information gathered.

- Budgetary and time constraints impacted on this report presentation, kept within simple publishing requirements, i.e. in-house lay-out, copies and binding.

- This report was required in English while the data was collected in Portuguese. This involved translation and may have introduced some interpretation.

3

National register of media initiatives

Diversity of the media landscape in Mozambique

The UNDP/UNESCO Media Development Project in Mozambique aims to strengthen media pluralism in the country. This presupposes that pluralism is a reality and the results of this study permit to confirm this assertion.

One however would want to qualify just how significant is the actual level of media pluralism, at this particular point in time of the history of the Mozambican media, in order to measure how big a challenge would entail its strengthening.

This study's report offers a mapping of the sector's diversity, in terms of the media organisations' number, type, geographical location, linguistic production and form of ownership. The study also provided the opportunity to produce a first national media directory (annexed) presenting some of this information in a succinct form.

This study surveyed nearly all media operations and projects in the country, as defined in page 19: as many as 111 were actually surveyed. The media organisations in operation form the better part of those surveyed: they are 92 in total. Some 19 media organisations still in the form of projects were also surveyed. Please refer to Annex C for a full listing of surveyed media organisations.

As explained in pages 19 and 20, some were unfortunately not surveyed. If all in existence during the surveyed period could have been included, there would have been at least five additional media operations (*RM Cabo Delgado*, *RM Manica*, *RM External Service*, and *O Amanha*) and four additional media projects – that became operational after the surveyed period (*Amanhecer*, *TVM Cabo Delgado*, *TVM Zambezia*, *TV Cabo Moçambique*). These bring the total count from 111 surveyed to 120 registered. In fact, there could have been more in existence at the time, as there might be some small publications such as newsletters and some projects that were unknown to us and did not respond to the newspaper advert inviting them to register. Please refer to the annexed Mozambique Media Directory for all registered.

Print and broadcast media

The two broad categories of ***print*** and ***broadcast*** media share almost equally the entire spectrum of media operations and projects, in numerical terms. The print media, including paper printed as well as faxed and Internet or email publications, accounts for most surveyed operations. The broadcasting sector, including radio, television and video, is less numerous among media operations but represents the majority of projects. The remaining are multimedia including one partly operational and 3 projects.

Each of these broad categories have been subdivided into several subcategories, where some clearly dominate in numbers. In the print sector, weekly newspapers, newspapers other than dailies and weeklies, and newsletters are the most numerous. In the broadcasting sector, radio stations are very indisputably dominating the scene.

The following table shows the total breakdown of all organisations surveyed per broad category and subcategory. Please refer to the Typology section under Definition of Core Terminology (pp.21-23) for the definitions of base labels shown on the left column. The same section includes an explanation of the categorisation process.

Table 1
Print and Broadcast media operations and projects [1]

	TOT	OPER	PROJ
Print	***53%***	*57%*	*37%*
Daily newspaper	**4**	4	-
Weekly newspaper	**13**	11	2
Other newspaper	**13**	11	2
Newsletter	**12**	10	2
Magazine	**7**	7	-
Email media	**2**	2	-
Daily fax media	**6**	5	1
Weekly fax media	**-**	-	-
Other fax media	**2**	2	-
Broadcast	***43%***	*42%*	*47%*
Public radio	**10**	10	-
Private commercial radio	**2**	2	-
Religious radio	**8**	8	-
Community radio	**13**	4	9
Political party radio	**1**	1	-
Public TV	**5**	5	-
Private commercial TV	**1**	1	-
Religious TV	**1**	1	-
Community TV	**-**	-	-
Other TV	**-**	-	-
Video advertising	**1**	1	-
Music video production	**-**	-	-
Video documentary	**1**	1	-
Various video production	**5**	5	-
Multimedia	***4%***	*1%*	*16%*
Half-operational & projects	**4**	1	3
TOTAL SURVEYED	**111**	**92**	**19**
News agency	***1***	*1*	-
Newspaper	***2***	*1*	*1*
Public radio	***3***	*3*	-
Public TV	***2***	-	*2*
Private TV	***1***	-	*1*
TOTAL REGISTERED [2]	***120***	***97***	***23*** [3]

1. *During the surveyed period of April 1999.*
2. *No further reference to those registered but not surveyed will be made in this study and all other tables it contains. These are named on page 41.*
3. *All four registered projects that were not surveyed became operational after the surveyed period.*

Four distinctive features of the Mozambican print and broadcast media emerge from this profile:

- Firstly, the impressive range and number of media organisations reflect the remarkable dynamism of the Mozambican media sector.
- Secondly, the print media in Mozambique is anything but daily newspapers. There are no projects to create more dailies and few other print media in project.
- Thirdly, the Mozambican broadcasting sector, dominated by radio, is moving from a national public network's prevalence towards a more local one, mostly made up of community radio stations and projects but also religious stations.
- Fourthly, the fair amount of new media projects in Mozambique could indicate a perception of the national environment as being favourable to the media, but could also indicate that there are gaps in the information services currently provided.

National, provincial and local media

The results of the study demonstrate that, contrary to what one could expect, there are actually fewer media organisations describing themselves as 'national' than as 'provincial' or 'districtal' ones. (We chose to adopt the term 'districtal' rather than 'local' as it translates more genuinely the idea referred to in Portuguese during the interviews).

Provincial and districtal media

Close to 60% of all surveyed media organisations are describing themselves as either provincial or districtal (66 out of 111), and only 36% describe themselves as 'national' media operations or projects (40). The remaining 4% are either operating at both national and SADC levels, or are geared at an international market.

Of the 66 media operations and projects describing themselves as provincial or districtal media, 50 are currently in operation.

Of these, 9 are based in the city of Maputo, the remaining being distributed in each of the ten provinces. The provinces best serviced by such media operations are Maputo City (9), Zambezia (7), Sofala (7), and Inhambane (6). Adding the province of Maputo to Maputo City, the capital's region is clearly the best serviced by such provincial or districtal media (13).

As can be observed below, radio stations form the bigger part of the provincial and districtal media operations (22).

The provincial public radio service of *Rádio Moçambique* is most the present media in the provinces. Religious (6) and community (4) radio stations also form an important part of these media operations, and are found in six of the provinces.

In the print sector, most provincial and districtal publications are newspapers other than dailies and weeklies (7) and newsletters (6). These are present in nine provinces. Out of the city of Maputo, only one province counts a daily (1) and three provinces have one or two weekly newspapers.

- Most media operations are therefore defining their field of action as provincial or districtal, and most of these are radio broadcasters.

- The provinces of Cabo Delgado, Manica, Gaza and Nampula are those with less such media operations than other provinces.

Table 2
Provincial and districtal media operations

	TOT	C.D	Gaz	Inhb	M.Cit	Mnc	M.Pr	Nmp	Nias	Sofla	Tete	Zamb
Daily newspaper	**1**	-	-	-	-	-	-	-	-	1	-	-
Weekly newspaper	**4**	-	-	2	-	1	-	-	1	-	-	-
Other newspaper	**7**	1	1	1	1	-	1	-	1	-	-	1
Newsletter	**6**	-	-	1	1	-	-	1	-	1	-	2
Magazine	**1**	-	-	1	-	-	-	-	-	-	-	-
Email media	**0**	-	-	-	-	-	-	-	-	-	-	-
Daily fax	**0**	-	-	-	-	-	-	-	-	-	-	-
Other fax	**1**	-	-	-	-	-	-	-	-	-	1	-
Public radio	**9**	-	1	1	2	-	-	1	1	1	1	1
Commercial radio	**2**	-	-	-	2	-	-	-	-	-	-	-
Religious radio	**6**	-	-	-	-	-	1	1	-	2	1	1
Community radio	**4**	-	1	-	-	-	1	-	-	-	1	1
Political party radio	**1**	-	-	-	1	-	-	-	-	-	-	-
Public TV	**3**	-	-	-	-	-	-	1	1	1	-	-
Commercial TV	**1**	-	-	-	1	-	-	-	-	-	-	-
Religious TV	**1**	-	-	-	1	-	-	-	-	-	-	-
Other TV	**0**	-	-	-	-	-	-	-	-	-	-	-
Video Advertising	**0**	-	-	-	-	-	-	-	-	-	-	-
Documentary video	**1**	-	-	-	-	-	-	-	-	1	-	-
Various video prod.	**1**	-	-	-	-	-	-	-	-	-	-	1
Multimedia	**1**	-	-	-	-	1	-	-	-	-	-	-
TOTAL	**50**	**1**	**3**	**6**	**9**	**2**	**3**	**4**	**4**	**7**	**4**	**7**

- As shown below, sixteen (16) additional provincial or districtal media organisations are still in the form of projects – most of these are community radio projects (9) in Manica, Nampula and Tete especially.

- There are no such projects for the provinces of Cabo Delgado, Gaza and Inhambane – although the first two of these provinces have very few provincial or districtal media already in operation.

- It can also be noted that there are no known daily newspaper's projects and only one weekly newspaper project in the pipeline.

Table 3
Provincial and districtal media projects

	TOT	C.D	Gaz	Inhb	M.Cit	Mnc	M.Pr	Nmp	Nias	Sofla	Tete	Zamb
Weekly newspaper	**1**	-	-	-	1	-	-	-	-	-	-	-
Other newspaper	**1**	-	-	-	-	-	1	-	-	-	-	-
Newsletter	**2**	-	-	-	-	-	-	-	-	-	-	2
Community radio	**9**	-	-	-	1	2	1	2	-	1	2	-
Multimedia	**3**	-	-	-	-	1	-	-	1	-	-	1
TOTAL	**16**	**0**	**0**	**0**	**2**	**3**	**2**	**2**	**1**	**1**	**2**	**3**

The national media

Among all media organisations describing themselves as 'national' (40), some 37 are currently in operation, and three at a project stage. Nearly all those operational are based in the city of Maputo (32).

This leaves only five (5) national media in operation out of Maputo City, namely one daily and one weekly in the province of Maputo (in Matola in fact), one magazine in Nampula, and one newsletter and one newspaper other than daily or weekly in Sofala.

Interestingly, the *Diário de Moçambique*, a daily published in the capital city of Sofala, Beira, is not describing itself as a national media, although it can be purchased elsewhere in the country and contains substantial national news. One could wonder whether there are no similar media based in Maputo who have described themselves as national and that could rather be considered as provincial. Or local.

Table 4
Media operations and projects described as national

	TOT	M CTY	MPT	NAP	SOFL	*(Proj.)*
Daily newspaper	**3**	2	1	-	-	
Weekly newspaper	**8**	6	1	1	-	*(1)*
Other newspaper	**4**	4	-	-	-	*(1)*
Newsletter	**3**	2	-	-	1	
Magazine	**6**	5	-	1	-	
Email media	**2**	2	-	-	-	
Daily fax media	**6**	5	-	1	-	*(1)*
Other fax media	**1**	-	-	-	1	
Public radio	**1**	1	-	-	-	
Religious radio	**1**	1	-	-	-	
Public TV	**1**	1	-	-	-	
Video advertising	**1**	1	-	-	-	
Various video prod.	**3**	3	-	-	-	
TOTAL	**40**	**33**	**2**	**3**	**2**	
Total operational	**37**	32	2	1	2	
Total projects	**3**	1	-	2	-	*(3)*

The current concentration of 'national' media in Maputo City and province could imply a very poor coverage of local and provincial news in the national media, other than Maputo-news, unless many national media based in Maputo have a strong presence elsewhere in the country.

Rádio Moçambique, *TVM* and *Notícias* have provincial delegations, *Media Coop* very recently opened one in Beira, but such presence outside of Maputo is unlikely in many cases, given the limited resources most media organisations have at their disposal.

One could therefore imagine that in most 'national' media, Maputo benefits from a preferential treatment over other provinces. However, this hypothesis should be the object of further study.

- Could it be that most media currently in operation are mainly provincial or districtal (50), rather than national (37), precisely because the 'national' media is perceived as too Maputo-oriented, calling for a gap to be filled? The present study is unable to answer this question with certainty but contents' analysts could possibly confirm this hypothesis. One thing is however obvious: this tendency is unlikely to change with the up and coming media projects. If fact, most new media projects (16 out of 19) did not describe themselves as national but rather as provincial or districtal. Only three new media projects aim to be national operations.

- It is interesting to note that 81% of the 'national' media in operation are in the print sector, with 30 publications against only 7 broadcast media organisations, while the provincial and districtal media is dominated by radio. Of course broadcasting ranges set more clearly the geographical limits of radio than print media.

Media ownership structures

The pluralism of any media sector is also measurable in terms of its ownership diversity. What could be said of a country's media diversity if it were entirely dominated by a single owner, be it the State, a businessman, a church or a multinational?

In this regard, again, the Mozambican operational media scores positively with 34% owned entirely or mostly by the public (or the State as often described), 36% owned entirely or mostly by private commercial interests, and 28% owned entirely or mostly by private non-profit entities.

It is important to note that the question of ownership was the most difficult one to answer by interviewees during the survey.

- Firstly, several respondents (editors and directors) did not know how to answer and had to make consultations to do so.

- Secondly, other respondents had difficulty to understand the notions of non-profit vs. commercial ventures. They often believed that any sales or advertising income signified that the enterprise was commercial, or that the absence of profit automatically signified that the enterprise was a non-profit one, regardless of its actual status and purposes. In this perspective, only commercial ventures could earn an income and non-profit organisations should remain entirely dependent on donations and grants.

- Thirdly, several interviewees from the public service were likewise unable to differentiate commercial from non-profit purposes, or - when speaking of a mix enterprise - were unable to say whether the state or private interests were the majority holders.

- There were also some confusion within the religious and community radio stations. This got clarified once one religious station described itself as a private commercial operation while the others are actually non-profit, and once all ICS community radio stations were regrouped into the public non-profit category despite the fact that some of them had described themselves differently.

- Finally, it should be noted that in several parts of the world, there are owners of media operations that do not wish to be known. Offering false information on the matter is not an uncommon occurrence and, hypothetically, it could have happened during this survey. 'Front names' on legal registers (these were not consulted) could also have been provided to Mozambican authorities in some unknown cases.

When looking at both media operations and projects, the full picture is as follows:

Table 5
Ownership structure of media organisations

	TOTAL	Operational	In project
Public ownership			
Public/State non-profit	**23**	19	4
Public/State commercial	**11**	11	-
Mix + Public/State non-profit [1]	**1**	1	-
Mix + Public/State commercial	**-**	-	-
Private ownership			
Mix + Private non-profit	**2**	2	-
Mix + Private commercial	**3**	3	-
Private commercial single owner	**12**	12	-
Private commercial shareholders	**14**	12	2
Private commercial religious	**1**	1	-
Private commercial cooperative	**6**	5	1
Private non-profit religious	**11**	10	1
Private non-profit association	**14**	10	4
Private non-profit - other [2]	**8**	4	4
Other form of ownership [3]	**2**	1	1
No information	**3**	1	2
TOTAL	**111**	**92**	**19**

1. *Mix + : Abbreviation for 'Mix enterprise with a majority of shares controlled by…' either private sector or public/state sector.*
2. *Private non-profit – other: owned by NGOs or political parties.*
3. *Other form of ownership: media projects unspecified answers.*

Print media ownership

When looking at ownership of the print media, one can observe that most newspapers are entirely owned by private commercial interests (14) or mostly so (2). The rest of newspapers are owned entirely or mostly by private non-profit entities (6),

or entirely by public enterprises (3). These figures indicate a strong diversification of the newspapers' ownership when one compares that with the past history of Mozambique.

The only question raised by the current newspapers' ownership pattern is the prevalence of single individuals owning most of the commercial enterprises – rather than stakeholders or co-operatives. Given the fragility of the newly liberalised economy and the small circulation of newspapers in Mozambique, one can wonder whether several of these enterprises are not vulnerable in capital terms. But only the test of time will answer this question.

Other kinds of publications, however, are mostly owned by private non-profit entities (11). Eight are owned entirely or mostly by private commercial interests, and six entirely by public enterprises. In fact, such presence of non-profit entities on that segment of the market is probably even stronger than suggested here, as there are certainly a great number of other newsletters not covered by this survey that are also owned by private non-profit entities such as NGOs and associations.

Table 6
Print media ownership (operational)

	TOT	Newspapers			Other publications				
		Daily paper	Wkly paper	Other paper	Nws-letter	Mg-zine	Email media	Daily fax	Other fax
Public/State									
Non-profit	**8**	-	-	2	3	3	-	-	-
Commercial	**1**	1	-	-	-	-	-	-	-
Mix enterprise									
+ Public Non-profit	**0**	-	-	-	-	-	-	-	-
+ Public commerc.	**0**	-	-	-	-	-	-	-	-
+ Private Non-profit	**2**	1	-	-	-	1	-	-	-
+ Private commerc.	**3**	-	2	-	-	-	-	1	-
Private commerc.									
Single owner	**10**	2	3	3	-	-	-	1	1
Shareholders	**6**	-	1	1	-	-	2	2	-
Religious	**0**	-	-	-	-	-	-	-	-
Cooperative	**5**	-	3	1	-	-	-	1	-
Private non-profit									
Religious	**3**	-	-	-	2	1	-	-	-
Association	**9**	-	1	4	1	2	-	-	1
Other non-profit	**3**	-	-	-	3	-	-	-	-
Other ownership	**1**	-	-	-	1	-	-	-	-
No information	**1**	-	1	-	-	-	-	-	-
TOTAL	**52**	**4**	**11**	**11**	**10**	**7**	**2**	**5**	**2**

Broadcast media ownership

The ownership pattern in the broadcasting sector is different than that of the print sector. In broadcasting, the public enterprises are well positioned both in radio and television.

Most of the radio stations are owned by public enterprises (14), followed by eight (8) owned by private non-profit entities and only three (3) by private commercial enterprises (including a religious commercial one). Interestingly, most of the public

radio stations are describing themselves as commercial public broadcasters. These are essentially the *Rádio Moçambique* stations. The non-profit public radio stations are described as community radio stations and are those owned by the *Instituto de Comunicação Social*. The private non-profit radio stations (8) are essentially owned by churches (7).

There are seven television stations, four of which are entirely owned by public enterprises, two by private commercial owners and one by a mix enterprise (majority public).

Video production (7 in operation) is the broadcasting sector where private commercial enterprises are mostly involved. Shareholders' businesses own (4) such production facilities, including one producing advertising and one various kinds of productions. Public enterprises (3) are also quite present in this sector, owning three non-profit facilities involved in documentary and other productions. These are the video units of the *Instituto de Comunicação Social*.

Table 7
Broadcast media ownership (operational)

	TOT	Radio					TV			Video		
		Public	Cmrcl	Relg	Cmnty	Poltcl	Public	Cmrcl	Relg	Advrt	Docm	Various
Public/State												
Non-profit	**11**	2	-	-	4	-	2	-	-	-	1	2
Commercial	**10**	8	-	-	-	-	2	-	-	-	-	-
Mix enterprise												
+ Public Non-profit	**1**	-	-	-	-	-	1	-	-	-	-	-
+ Public commerc.	**0**	-	-	-	-	-	-	-	-	-	-	-
+ Private commerc.	**0**	-	-	-	-	-	-	-	-	-	-	-
Private commerc.												
Single owner	**2**	-	1	-	-	-	-	1	-	-	-	-
Shareholders	**6**	-	1	-	-	-	-	-	1	1	-	3
Religious	**1**	-	-	1	-	-	-	-	-	-	-	-
Cooperative	**0**	-	-	-	-	-	-	-	-	-	-	-
Private non-profit												
Religious	**7**	-	-	7	-	-	-	-	-	-	-	-
Association	**0**	-	-	-	-	-	-	-	-	-	-	-
Other non-profit	**1**	-	-	-	-	1	-	-	-	-	-	-
Other ownership	**0**	-	-	-	-	-	-	-	-	-	-	-
No information	**0**	-	-	-	-	-	-	-	-	-	-	-
TOTAL	**39**	**10**	**2**	**8**	**4**	**1**	**5**	**1**	**1**	**1**	**1**	**5**

Languages used in Mozambican media

The Portuguese language is massively used by Mozambican media operations and there are no sign of future change judging from the new projects' intentions.

Only one media organisation declared using exclusively a national language and no new project seem to intend to do so.

In the case of both current and projected media organisations, those using only Portuguese are mainly print media while those using national languages are mostly in the radio and video sectors.

An interesting fact to note is that 5,5% of Mozambican media operations are currently using only English as their language of production. These are mostly print media, and one video production enterprise. There is, however, no new project intending to use English.

Table 8
Language of publication and broadcasting (operational)

	TOTAL	Portug.	Nat. langu.	Port.+1Nat	Port.++Nat	English
Daily newspaper	**4**	4	-	-	-	-
Weekly newspaper	**11**	10	-	-	1	-
Other newspaper	**11**	8	-	-	1	2
Newsletter	**10**	9	-	1	-	-
Magazine	**7**	7	-	-	-	-
Email media	**2**	1	-	-	-	1
Daily fax	**5**	4	-	-	-	1
Other fax	**2**	1	-	-	-	1
Public radio	**10**	2	-	2	6	-
Commercial radio	**2**	1	-	1	-	-
Religious radio	**8**	2	-	-	6	-
Community radio	**4**	-	1	2	1	-
Political party radio	**1**	-	-	1	-	-
Public TV	**5**	5	-	-	-	-
Commercial TV	**1**	1	-	-	-	-
Religious TV	**1**	1	-	-	-	-
Video Advertising	**1**	-	-	-	1	-
Documentary video	**1**	-	-	-	-	1
Various video prod.	**3**	1	-	2	-	-
Multimedia	**1**	-	-	-	1	-
No answer	***2***	-	-	-	-	-
TOTAL	**92**	**57**	**1**	**9**	**17**	**6**

Portug. = Portuguese only
Nat. langu. = National language(s) only
Port.+1Nat. = Portuguese and one national language
Port.++Nat. = Portuguese and two or more national languages
English = English only

In current operations, the majority of media organisations use exclusively Portuguese (62%), while nearly a third is using Portuguese together with one or more national languages (28%).

But this is different in the case of media projects, as can be observed on the next table.

Table 9
Language of publication and broadcasting (in project)

	TOTAL	N/answer	Portug.	Nat. langu.	Port.+1Nat	Port.++Nat	English
Weekly newspaper	**2**	-	2	-	-	-	-
Other newspaper	**2**	-	2	-	-	-	-
Newsletter	**2**	-	2	-	-	-	-
Magazine	**0**	-	-	-	-	-	-
Daily fax	**1**	-	1	-	-	-	-
Religious radio	**0**	-	-	-	-	-	-
Commercial radio	**0**	-	-	-	-	-	-
Community radio	**9**	1	1	-	5	2	-
Commercial TV	**0**	-	-	-	-	-	-
Multimedia	**3**	-	-	-	1	2	-
T O T A L	**19**	**1**	**8**	**0**	**6**	**4**	**0**

New projects seem to reconsider the use of Portuguese as sole language of communication, as opposed to its use in combination with one or more national languages.

Only 42% of new projects would be using exclusively Portuguese and 53% would rather use it in association with national languages. This represents a 20% drop from the current level of sole use of Portuguese within operational media, and an increase of 25% from the current use of Portuguese together with national languages.

When looking more closely at both operational media and new media projects, this future increase in the use of national languages can be attributed to radio and multimedia projects alone. All new print media intend to use Portuguese as their sole language of publication.

Table 10
Language of publication and broadcasting (All)

	Operational			In project		
	Port. Only	Port.+Nat. L.	English	Port. Only	Port.+Nat. L.	English
Print	44	3	5	7	-	-
Radio	5	19	-	1	7	-
TV & Video	8	3	1	-	-	-
Multimedia	-	1	-	-	3	-

It therefore seems that the more radio stations there will be in the country, the more national languages will be used in communication. To further confirm this apparent trend, it is interesting to look at the radio listeners' first language of choice.

As explained in *Chapter 2: Methodology and Process*, the study also included a mini-survey of individuals' preferences with regards to the newspapers they read and the broadcasters they listen to.

This does not constitute a proper audience survey, but the sample of 136 individuals (selected in markets, schools and public services in 25 districts around all provinces in the country) also provides some information regarding language issues. More details on respondents can be found in Table 18 on page 60 and in Annexe K.

Table 11
Radio listeners' first language of choice (mini-survey)

	TOT	%	F	M	Age	Ed. Level
Bitonga	**3**	1,9	1	2	32	5
Changana	**2**	1,3	1	1	34	5
Chimaconde	**1**	0,6	1	-	43	11
Cilewe	**3**	1,9	1	2	21	6
Emakuwa	**3**	1,9	-	3	32	4
Muani	**1**	0,6	1	-	23	10
Nhanja	**1**	0,6	-	1	20	10
Portugues	**135**	86,0	67	68	29	9
Sena	**1**	0,6	-	1	29	6
All languages	**1**	0,6	-	1	25	2
Tsonga	**1**	0,6	1	-	19	6
Yao	**1**	0,6	1	-	40	5
No answer	**4**	2,6	4	-	23	6
TOTAL	**157**	**100**	**74**	**79**		
Averages					**28**	**7**

When asked in which language do they listen to radio, some 86% individuals responded primarily Portuguese. The same tendency has been observed in all provinces excepted in Cabo Delgado and Manica, where the choice of Portuguese is less pronounced, although not very significantly.

This choice is not surprising when considering that Portuguese is the language most used by Mozambican media. It is however a little surprising when considering that only four (4) of the existing radio stations (24 in total) are broadcasting solely in Portuguese. As many as 25 radio stations do broadcast in Portuguese *and other national languages*, of which 17 in more than one national language (see table 8).

So, how can we explain that so few individuals mentioned a national language as the first language they listen to on the radio? Could 'Portuguese' sound like a good answer? Or could this be explained by the fact that the sample is formed of an oversized group from Maputo province? If so, how can we explain the preference for Portuguese in the southern province as opposed to other parts of the country? Or would this be explained by the fact that most radio listeners interviewed by us are actually listening to the national service of *Rádio Moçambique*, rather than to its provincial or inter-provincial services?

- This radio listeners' preference for the Portuguese language should be ascertained through other audience surveys and discussed with national linguists. *Rádio Moçambique* itself has recently carried out an audience survey that is unfortunately not yet available to the UNESCO/UNDP Media Development Project. If the audience choice were to be confirmed, it would invalidate the belief that listeners prefer radio broadcasts in national languages.

Diversity profile of Mozambican media

In conclusion to this chapter, it appears clearly that pluralism is significant in Mozambique, in terms of diversity of sources of information.

The number of media organisations alone is extremely high given the relatively recent liberalisation. The variety of print and broadcast media operation is well balanced and the ownership structure of the sector appears healthy in its diversity, although confused in its perception.

The language diversity of the country is poorly reflected within the media, but one should further consider the audience sample before formulating any judgement in this regard.

There is however one serious area of concern, given the national demography, is the strong concentration of national and local media organisations in Maputo City and province, following the unequal socio-economic development of the country. In some provinces, the diversity is limited to one or two provincial or districtal media operations, and a possible access to some national media.

How effective is this access to both national and provincial media, how real is this diversity for the audience, remain to be analysed. The next chapter proposes to do.

4

Media diversity impact

Pluralism exists but with limited impact

The present study is not a market research and cannot pretend to offer any in-depth impact analysis of the media operating in Mozambique at the moment. However, some data was collected from the media managers interviewed as well as from a small sample of the audience.

From this data, the picture is not entirely grim but calls for caution when qualifying the effectiveness and entrenchment of media pluralism in the country.

Print media circulation

The first observation to be made is that half of the print media representatives interviewed for this study did not provide information on their circulation figures. We suspect that many of them did not wish this information to be known and that some did not know it precisely themselves.

This being said there is no certainty about the exact number of copies of different print media in circulation in the country at any given time. Unless some of those who did not respond are also producing big print runs, the three bigger print runs (between 20,000 and 30,000) would be those of one daily newspaper, one weekly newspaper and one magazine, jointly responsible for the majority of copies in circulation. Two other weekly newspapers have print runs of 10,000 to 15,000.

The information gathered is therefore shared below with a word of great caution, given the high number of print media for which no information is available.

Table 12
Print copies sold, faxed or emailed nationally per sector (operational)

	N/answ	1> 500	> 1.500	>5.000	>10.000	>15.000	>20.000	>30.000	+30.000
Daily newspaper	-	2	-	1	-	-	-	1	-
Weekly newspaper	7	-	1	-	-	2	-	1	-
Other newspaper	6	5	-	-	-	-	-	-	-
Newsletter	7	3	-	-	-	-	-	-	-
Magazine	4	1	1	-	-	-	-	1	-
Email media	-	1	1	-	-	-	-	-	-
Daily fax	-	4	1	-	-	-	-	-	-
Other fax	1	1	-	-	-	-	-	-	-
TOTAL	**25**	**17**	**4**	**1**	**0**	**2**	**0**	**3**	**0**

As we could expect, it appears that four of the biggest print runs are produced in Maputo City, although nearly as many print media organisations are based elsewhere in the country (23 out of 52).

However there is one national publication based in Nampula that declares a 30,000 circulation – it is a religious magazine, *Vida Nova*. With regards to *Diário de Moçambique* in Sofala, they did not answer the question as can be seen below.

Table 13
Print copies sold, faxed or emailed nationally per province of origin

	N/answ	1> 500	> 1.500	>5.000	>10.000	>15.000	>20.000	>30.000	+30.000
C Delgado	-	1	-	-	-	-	-	-	-
Gaza	-	1	-	-	-	-	-	-	-
Inhambane	4	1	-	-	-	-	-	-	-
Maputo C	14	7	3	1	-	2	-	2	-
Manica	-	-	1	-	-	-	-	-	-
Maputo	1	2	-	-	-	-	-	-	-
Nampula	-	1	-	-	-	-	-	1	-
Niassa	1	1	-	-	-	-	-	-	-
Sofala	2	2	-	-	-	-	-	-	-
Tete	1	-	-	-	-	-	-	-	-
Zambezia	2	1	-	-	-	-	-	-	-
TOTAL	**25**	**17**	**4**	**1**	**0**	**2**	**0**	**3**	**0**

Now, when looking at *where* print copies are sold, faxed or emailed in the various provinces, it appears clearly that the capital city of Maputo is the main beneficiary of half of all publications (24 out of 52), as these say that the capital receives 50 to 100% of their copies.

Significantly, a much larger group of media operations provided information concerning their distribution in the city of Maputo than outside of the capital. Please refer to the following two tables to compare number of answers.

Table 14
Circulation destination: Maputo City (operational)

	No info	1 > 5%	> 10%	> 20%	> 30%	> 40%	> 50%	> 60%	> 70%	> 80%	> 90%	+90%
Daily newspaper	1	-	-	-	-	-	-	-	1	-	-	2
Weekly newspaper	2	-	-	-	1	1	-	1	1	2	-	3
Other newspaper	4	-	1	-	-	1	-	-	1	1	-	3
Newsletter	7	-	-	-	-	-	1	-	-	-	-	2
Magazine	1	-	-	-	1	-	-	-	-	2	1	2
Email media	2	-	-	-	-	-	-	-	-	-	-	-
Daily fax	3	-	-	-	-	-	1	-	1	-	-	-
Other fax	-	1	-	-	-	-	-	-	-	-	-	1
T O T A L	**20**	**1**	**1**	**0**	**2**	**2**	**2**	**1**	**4**	**5**	**1**	**13**

It is therefore unlikely that the results shown in the second table below – in terms of the proportion of copies reaching other provinces – would be much different with additional information from a greater number of respondents.

Table 15
Circulation destination: out of Maputo city and/or Mozambique (oper.)

	No info	1 > 5%	> 10%	> 20%	> 30%	> 40%	> 50%	> 60%	> 70%	> 80%	> 90%	+90%
Daily newspaper	4	-	-	-	-	-	-	-	-	-	-	-
Weekly newspaper	10	-	-	-	-	-	-	1	-	-	-	-
Other newspaper	10	1	-	-	-	-	-	-	-	-	-	-
Newsletter	9	-	-	-	-	-	-	-	-	-	-	1
Magazine	6	-	-	1	-	-	-	-	-	-	-	-
Email media	2	-	-	-	-	-	-	-	-	-	-	-
Daily fax	5	-	-	-	-	-	-	-	-	-	-	-
Other fax	2	-	-	-	-	-	-	-	-	-	-	-
TOTAL	**48**	**1**	**0**	**1**	**0**	**0**	**0**	**1**	**0**	**0**	**0**	**1**

We should explain that during interviews, editors were asked to provide an approximate breakdown of their distribution, in percentage, per province. Only 5 out of 51 could do so!

It is particularly alarming to notice that 90% of respondents were unable to provide information concerning their circulation outside Maputo City, although 65% could tell the proportion of copies they sell in the capital city.

If most editors can approximate the proportion they sell within the capital city, this means that they know that the remaining are sold outside the capital. However, how much, exactly where, they cannot tell apparently.

The last table above also shows that even editors based in the provinces outside Maputo were unable to say that they sold most of their copies outside Maputo.

- While the lack of information gathered concerning print runs may reflect a deliberate refusal to provide this information on the part of editors, the inability of those who answered to provide information concerning their circulation per province, in percentage, seems to clearly indicate that circulation is a mystery to editors.

- The obvious distribution gap between Maputo city and the remaining ten provinces is such that this fact alone would warrant a stern conclusion regarding the effective impact of media pluralism in the country – at least in the print sector.

The next chapter, looking at media organisations' vision and strategic direction will look at the existence of distribution and expansion plans, or the non-existence thereof.

Broadcasting coverage

One could hope that the broadcasting sector is more aware of its coverage that the print one is. Unfortunately, it is not the case. Thankfully, the report of the radio technical expert associated to this study allows to fill-in the information gaps (Annex F). But from the perspective of radio stations directors, the type of answers they provided to us indicates that, again, this kind of issues is not management's area of expertise.

Station managers were asked to indicate their radio or TV station's broadcasting range in km. Also, they were requested to provide information on the potency, in watts, of their transmitter.

Of all 24 radio stations surveyed, 18 could not provide *any* of this information. That is 75% of them. Among television stations, only two out of six provided some answers. Unfortunately, no television technical expert was associated to the study and we are therefore without this information.

Of course, insistence with the technical departments of these stations would probably permit to gather most of the referred information. However, it is interesting to note that when requested to provide it, their directors could not or simply did not provide it. The same applies to *Rádio Moçambique* and *TVM* than to smaller or precarious broadcasters.

The following tables demonstrate that those who could provide some information often did so in a curious manner. For example some have provided their potency or frequency in the column they chose to indicate their broadcasting range. This could be amusing but it is rather a sign that technical matters are often not sufficiently mastered by management, considering that a broadcasting range is not simply a technical matter but also one of effective audience coverage.

Table 16
Radio and TV broadcasting range (operational)

	N/info	Broadcasting range in km									
		5km	7km	10km	30km	40km	60km	70km	100km	123km	150km
Radio A	-	-	-	-	-	-	-	103.1	-	-	-
Radio B	-	102.7	-	-	-	-	-	-	-	-	-
Radio C	-	-	-	-	-	98.5	-	-	-	-	-
Radio D	-	-	-	-	-	-	-	-	-	1,5	-
Radio E [1]	-	-	-	10	-	-	-	-	-	-	-
Radio E [2]	-	-	-	-	-	-	-	-	50	-	-
Radio E [3]	-	-	-	-	300	-	-	-	-	-	-
Radio F	-	-	-	-	-	-	-	-	-	-	88,3
Other radios	19	-	-	-	-	-	-	-	-	-	-
TV A	-	-	1.0	-	-	-	-	-	-	-	-
TV B	-	-	-	-	-	-	31	-	-	-	-
Other TVs	5	-	-	-	-	-	-	-	-	-	-

Radio Station E has three transmitters.

Other non-technical information requested to interviewees was an estimate of the population in the area covered by their broadcast range and if possible of their audience within this population.

This appeared as difficult to respond to as matters of range or potency. In fact, only three radio stations in the entire broadcasting sector have attempted an answer – either about the population, or the audience, never both. This raises a question that should be kept in mind in a later chapter on sustainability: how these broadcasters can possibly try to attract advertising income to their stations?

Table 17
Coverage of radio and TV broadcasters (operational)

	N/info	Audience (Nb)	Population (Nb)	Power (Watts)
Radio A	-	-	2.000.000	500
Radio B	-	-	-	250
Radio C	-	-	1.000.000	100
Radio D	-	900.000	-	1.5
Other radios	21	-	-	-
TV A	-	-	-	1.0
TV B	-	-		100
Other TVs	5	-	-	-

- The great strength of radio broadcasting in Africa is that it enjoys a favourable prejudice: that of reaching more people than the print media, because it does not require literacy and can be heard while working or doing something else. To capitalise on this, radio broadcasters should however be able to provide figures on their audience, or at least on its potential in terms of the population reached by their signal.

- Both the print and broadcasting sectors reluctance in providing audience information shall be discussed in Chapter 6 on securing and managing resources, as this impacts on their ability to attract advertising revenues.

Audience response

As mentioned earlier, our field researchers carried out a mini-survey of the audience. It has no scientific pretensions but could be used for comparison with other audience surveys executed in the country. It is also useful to compare with the information provided by the media operations surveyed by us, as in the previous case of listeners' language preference vs. media's language of publication or broadcasting.

The samples were composed of an equal number of men and women, in most cases, and formed in 20 districts, *mostly urban*. The number of respondents in each sample is, however, non-representative of the demographic distribution across the various provinces in the country, as can be seen above.

Respondents were requested to name which newspaper do they read most, which radio station do they listened to most, and which television station do they watch most. Unfortunately, they were not asked first whether they do, or not, read a newspaper, listen to a radio and watch a television, nor were they asked how many

times a week. We can safely assume that those who did not answer to each particular question are those who do not, but it is possible that some who answered do not either and just gave what they thought would be a 'good' answer.

Table 18
Respondents' distribution per province (mini-survey)

	TOTAL Respondents	Answers to questions on these topics					
		Radio		Newspaper		Television	
		N/ans	Answ	N/ans	Answ	N/ans	Answ
C Delgado	12	1	11	2	10	9	3
Gaza	17	-	17	2	15	4	13
Inhambane	13	-	13	3	10	8	5
M City	8	-	8	-	8	-	8
Manica	5	-	5	1	4	1	4
Maputo	25	1	24	8	17	5	20
Nampula	16	1	15	-	16	3	13
Niassa	13	-	13	2	11	2	11
Sofala	7	-	7	1	6	-	7
Tete	21	-	21	1	20	6	15
Zambezia	20	-	20	-	20	13	7
Total	**157**	**3**	**154**	**20**	**137**	**51**	**106**

From the general picture shown above, it appears that more people could answer to a question relating to a radio station than to a newspaper or a television, which would confirm the general opinion that radio is the most accessible and popular media.

The table below presents the answers of respondents to our first question.

Table 19
Audience's first choice of newspaper

	Nb	%	F	M	Age	Educ.
No answer	20	12,7	11	9	28	5
All newspapers	3	1,9	2	1	30	9
Amanhecer	1	0,6	-	1	22	11
A voz da criança	2	1,3	2	1	23	10
Campo	5	3,2	2	3	26	10
Demos	1	0,6	-	1	23	11
Desafio	7	4,5	1	6	22	9
Diário de Moç.	7	4,5	4	3	25	9
Domingo	8	5,1	5	3	30	9
Faisca	1	0,6	-	1	28	9
Fim de semana	13	8,3	8	5	26	8
Folha universal	1	0,6	-	1	23	7
Megajornal	1	0,6	1	-	24	Unknown
Notícia	70	44,6	34	36	31	9
O Coqueiro	3	1,9	2	1	22	10
Savana	14	8,9	5	9	28	10
TOTAL	**157**	**99,9**	**77**	**81**		
Averages					**26**	**9**

The weight of a single newspaper, *Notícias*, is astonishing (RM scored similarly but through a great number of stations – see below). When looking at the details shown in Annexe K, this newspaper is however definitely less read (and perhaps available) in some provinces than others.

Although there are a little more newspapers (30) as there are radio stations (27) in the country, the audience could not name as many newspapers as radio stations, as can be seen from the previous and following tables. The percentage of non-respondents to the question on newspapers is also more than four times higher than to the question on radio.

As can be seen below, the rate of answer to the question on preferred radio station is very good. But the impact of radio stations other than those affiliated to *Rádio Moçambique* appears low.

It should however be noted that most other radio stations have a limited broadcasting range as they often chose to be a local or community radio station.

Table 20
Audience's first choice of radio station

	Nb	%	F	M	Age	Educ.
No answer	3	1,9	2	1	24	4
Malawi's radio	1	0,6	-	1	20	10
R.M. (No detail)	48	30,6	25	24	31	8
R.M. Cabo Delgado	2	1,3	1	1	24	6
R.M. Chimoio	2	1,3	1	1	24	10
R.M. Inhambane	6	3,8	4	2	28	8
R.M. Manica	6	3,8	4	2	21	8
R.M. Maputo-Gaza	2	1,3	-	2	36	8
R.M. Nampula	1	0,6	-	1	-	10
R.M. Niassa	1	0,6	1	-	40	5
R.M. Sofala	5	3,2	2	3	27	9
R.M. Tete	13	8,3	7	6	27	7
R.M. Zambezia	4	2,5	2	1	32	10
R.M. Nacional	21	13,4	11	10	31	9
R.M. Rádio Cidade	12	7,6	3	9	25	10
R. comun. Angonia	4	2,6	2	2	19	8
R. comun. Moamba	3	1,9	1	2	29	7
R. comun. Xai-Xai	6	3,8	3	3	42	6
Rádio Encontro	5	3,2	2	3	27	11
Rádio Miramar	3	1,9	2	1	21	7
Rádio Paz	4	2,6	3	1	24	11
Rádio Terra Verde	1	0,6	1	-	19	9
RDP Africa	4	2,6	-	4	30	11
Total	**157**	**100**	**77**	**80**		
RM all stations tota	**119**	**75,8**	**59**	**61**		
Averages					**27**	**8**
RM all stations averages					**28**	**8**

Looking now at television there are no major surprises other than the fact that about 2/3 of all respondents answered the question (it seems a lot even in urban areas).

Table 21
Audience's first choice of television station

	Nb	%	F	M	Age	Educ.
No answer	52	33,1	26	26	28	8
RTP África	32	20,4	17	15	28	10
South African TV	5	3,2	3	2	27	8
Televisão Miramar	4	2,6	-	4	30	11
TVM	60	38,2	27	33	30	9
Zimbabwean TV	4	2,6	3	1	23	9
TOTAL	**157**	**100,1**	**76**	**81**		
Averages					**28**	**9**

TVM dominates the market but *RTP* is ahead of all other TV broadcasters. The absence of *RTK* among the audience's first choices is noticeable. The new *TVM Cabo Delgado* and *TV Cabo Moçambique* did not exist at the time.

The fact that 26% of viewers are naming a foreign television broadcaster as their first choice is of concern in relation to national broadcasters. The greater part of these is RTP, the Portuguese public broadcaster accessible to viewers on an open channel. Others are public broadcasters from the neighbouring countries, broadcasting in English and requiring a satellite connection from viewers.

The results of this audience mini-survey tend to confirm that radio is more accessible than any other media and listened to by a great majority, at least in the mostly urban districts of the country.

The public radio service, for its part, seems to be playing its role well with an audience of 77% of all radio listeners. Some of the religious and most community radio stations, for their part, are not doing badly either, as their target audiences and broadcasting range are often limited to one or some districts. In these conditions, they appear to be reaching their objective properly.

In the print sector, the results are less positive, considering the great number of print media operations that describe themselves as national or that aim to reach a broad audience. The three main weeklies, *Savana*, *Fim de Semana* and *Domingo*, score poorly behind *Notícias*, considering the fact that they aim similar audiences. However, Notícias's popularity varies from province to province, possibly according to its availability.

It should however be noted that *Notícias* benefits from being a daily and as such it is being delivered to many public service offices for many years (long before the apparition of most other newspapers). This appears to vary from province to province, from the full data available (see Annexe K). Where it is the case, many people therefore read it without having to buy it. Accordingly, its declared print run is smaller

than that of two of the above-mentioned weeklies that would probably not print more if they did not sell more.

In the television-broadcasting sector, the public services of TVM and RTP also appear to be doing a good job, as they do represent the first choice of 91% of all television viewers. The share of foreign broadcasters is however very high. Obviously the television audience is much smaller than that of radio or print media even in mostly urban districts – it should even be smaller with demographically proportional samples in each province.

Impact of media pluralism

In conclusion to this first part of our report, it emerges that there is media pluralism in Mozambique, in terms of the diversity established in the previous chapter. However, its impact on the potential audience appears limited.

- In terms of impact, there is little pluralism among print media given the readership domination of one single newspaper over the others and this newspaper's special historical advantages, particularly outside the province of Maputo, Gaza and Inhambane.

- Likewise, pluralism impact is limited among broadcast media given the fact that there are seldom more than one radio or television station to choose from in any given provincial capital or town, particularly outside the city and province of Maputo and among television broadcasters.

- There are few signs that the issue of impact is given serious attention in most media operations, judging from their inability or refusal to provide information on their effective or potential audience, particularly outside the city and province of Maputo and among broadcast media. This will be further examined in subsequent chapters.

In the second part of our report, that consists of the following two chapters, the existing pluralism's entrenchment and its possible reinforcement – at least in terms of impact – will be examined through the assessment of the sustainability potential of media operations.