

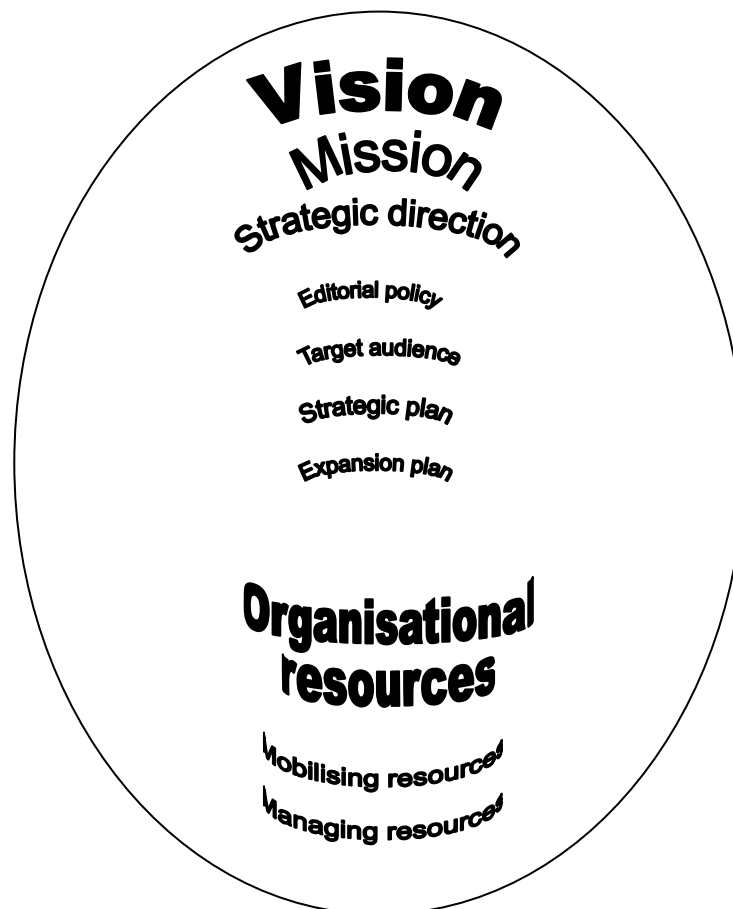
## Vision and strategic direction for Sustainability

Or the knowledge of what shall be sustained

This survey has not considered media contents per say, as other studies have focused on this aspect before (please refer to bibliographical references on page 32). However, it appeared important from a sustainability perspective to examine interviewees' ability to describe their media's vision and strategic direction through their answers to some of our questions. These questions focused on issues such as their editorial policy, mission statement, target audience, strategic plan, and circulation or broadcast expansion plan. These 'vision factors' are reviewed in the present chapter. Organisational resources factors will be discussed in the following chapter.

**Figure 1**

**Vision and resources factors which impact on media sustainability**



*MH Bonin, 1999*

## Editorial policies in media organisations

When asked about their editorial policy, 22 media organisations were unable to describe or hand-over their policy. Among all others, only a few could actually hand-over a written document. The majority described verbally a policy (72), some of which (9) admitted that they do not really have an official editorial policy.

**Figure 2**

### Editorial policy within media organisations (operational and projects)

Described verbally only (72)		Handed-over (17)	No answer/policy (22)
A Folha Xiphefu	O Universitário	Baia	A Voz da U Católica M
A Voz do Escritor	Ouvivendo	Correio da Manhã	Coopnorte
A Voz da Criança	Promarte	Daily Top News	Digi & Tal
Aro Juvenil	Rádio Búzi	Faisca	Geografia
Boletim Info da Mulher	Rádio Com. Angonia	Imparcial	Iris Imaginação
Boletim das Zips	Rádio Com. Licungo	Media Fax	Macubar
Boletim do Inder	Rádio Com. Manhiça	News Around You	Metical
Campeão	Rádio Com. Moamba	Notícias	Nova Rádio Paz
Chuabo-Kavenha	Rádio Com. Xai-Xai	O Autarca	Rádio Com. Bawa
Correio Semanal	Rádio Com Zona Verde	O Coqueiro	Rádio Cm. Sussudenga
Democracia e DH	Rádio Miramar Maputo	Rádio Com. Mutarara	Rádio Encontro
Diário de Moçambique	Rádio Muhipiti	Rádio Escola Moatize	Rádio Nacala
Domingo	Rádio Pax	Rádio Feba	Rádio Miramar Beira
Ebano Multimedia	Rádio Terra Verde	Rádio Maria	RM Interprovincial Maputo
Elo Ecumenico	Rádio Transmundial	Savana	RM Tete
Expresso da Tarde	Revista Forum Mulher	Semanário Expresso	RTK rádio
Fax do Interior	Revista Rural Inder	Vida e Mulher	RTK televisão
Fim de Semana	RM Antena Nacional		TVM Sofala
Focus	RM Interprovincial Gaza		TVM Niassa
Folha Universal	RM Inhambane		Zambezi – rádio
GESOM	RM Nampula		Zambezi – revista
ICS (video units)	RM Niassa		Zambezi – televisão
Indian Ocean Weekly	RM Sofala		
Jornal Juvenil Niassa	RM Zambezia		
Kubzwala	RTP África		
Megajornal	Televisão Miramar		
Megamedia	Tempo		
Moçambique	Todos contra violência		
Monapo	TVM Nampula		
Mozambique In View	TVM Maputo		
N'tseco	Vida Nova		
Namuli	Voz de Pemba		
NotMoc	Xiphefu Caderno Literário		
O Campo	Zero		
O Popular	Zoom Multimedia		

Mention shall be made that three provincial newspapers have an editorial policy very similar to that of the *Savana* and *Media Fax*, both of which also share similarities with that of the *Imparcial*. The editorial policies of *Faisca* and *O Coqueiro* are the most obviously inspired by *Savana* and *Media Fax*, but it can also be observed from that of *O Autarca*.

Without inferring meaning to this observation, it should also be noted that some of the modifications introduced in these three provincial editorial policies have introduced policy differences that may be deliberate or the result of grammatical errors. An example of this is the sentence, in Savana's policy, that reads «Fundamental editorial criteria are independence and a critical attitude towards any [...] power» and that becomes, in Faisca's policy, «...fundamental editorial criteria are independence and self-criticism (*autocrítica*) towards any [...] power».

## Editorial policy components

When analysing the editorial policies of the media interviewed, the basic components of such policies were examined against standard components. These standard components, not always present in actual editorial policies but considered essential by the profession and in media studies, are the following:

- Mission of the media organisation
- Means to achieve this mission
- Political and ethical stands
- Contents / Issues to be focused on
- Target audience

## Mission statement

The mission of the media organisation can be stated separately from the editorial policy but is usually also included to this core policy. The mission, or central objective of the organisation, states why is the organisation established or to achieve what purpose. It is an essential element of any organisation's vision and strategic direction, in any given sector – including the media.

Excluding editorial policies that are only describing their content focus and target audience, there are 38 editorial policies that include some sort of objective or mission statement. Here are some examples of their formulation.

### Figure 3 Samples of mission in editorial policies

- 
- «Social intervention newspaper aiming to communicate, interpret and analyse events in Mozambique and Southern Africa.» *Imparcial*
  - «Has as objective to make known the Evangelic of our Lord and Saviour Jesus Christ.» *Rádio Feba*
  - «Has as objective to disseminate a positive image of Mozambique in the international community in order to develop tourism and attract foreign investment.» *Daily Top News*
  - «Aims to help readers improving their English reading and writing capacity.» *News Around You*
  - «To contribute to the struggle for the democratisation of communication means, the democratisation of information and the institutionalisation of the right to communicate. [...] To improve horizontal communication within the community and promote the social, economic and cultural activities of the community.» *ICS Community Radios*
  - «Information newspaper oriented towards the communication and interpretation of events in Zambezia province and others of national character.» *O Coqueiro*
  - «Leads in the defence of noble interests such as peace, national unity, economic and social development of Mozambique.» *Notícias*
  - «To educate, form, inform and recreate.» *RM Inhambane*

«Aiming the sustainability of the current reforms towards democracy in the country.» *Zero*

«Is a meeting of cultures, a agent of changes... an instrument of dialogue and co-operation between peoples contributing to the multicultural fraternity.» *Rádio Pax*

«Gives information that reconstruct the moral, ethic and Christian tissue.» *Rádio Transmundial*

«Promotes and sensitises society to women and gender issues.» *Revista Forum Mulher*

«Make known the local literature.» *Folha Xiphefo*

«Educate and inform on the environment, natural resources management and sustainable development.» *Moçambique*

«Treat and discuss issues related to education and in particular the life and conditions of higher education.» *O Universitário*

«Gather the ideas of the youth in Niassa and other provinces.» *Jornal Juvenil do Niassa (project)*

«Sensitise the public opinion to the importance of human rights, contribute to the deepening of democracy and citizens' participation to the socio-political life and denounce human rights violations.» *Democracia e Direitos Humanos, LDH*

«Make known the rhythm and dynamics of Mozambique to the Mozambicans living abroad and other interested.» *NotMoc*

«Promote and protect the citizens' rights proclaimed in the constitution and increase the information flux.» *Megamedia*

«Inform on sport and cultural achievements of the country, exalt successes of our talents and criticise what in our optic is being distorted.» *Campeão*

«The objective is to facilitate the Christian Council's Churches activities.» *Elo Ecumenico*

«To establish a link between the teachers and to divulge pedagogical techniques.» *Boletim das Zips*

«Provide communication for the development of rural communities.» *Rádio Comunitária de Angonia*

«Promotes peace, economic, social and cultural development of Mozambicans. The pacification is the main axis of this newspapers' work, reaching all socio-economic spheres.» *Domingo*

«Provide a television public service in Mozambique, respecting and encouraging respect for the Constitution of the Republic, resting on four pillars: a) national and cultural identity; b) democracy and peace culture consolidation; c) economic development, health, education and environment; d) entertainment and sports.» *TVM*

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*From a total of 89 editorial policies or elements thereof.*

There are other missions, either similar to these or not very clearly articulated in the editorial policy. In several cases, there is greater clarity about what the media wants to do than about *why* it wants to do so. There is not always awareness that publishing articles or producing programmes about this and that do not constitute a mission in itself.

When a radio wants to produce educational programmes does it mean that its overall mission is to educate? Or does this constitute a mean to achieve another objective? Likewise, when a newspaper wants to publish information articles on economic, social, cultural and political events, is this newspaper's mission is to publish general information? What therefore distinguishes this newspaper's mission from that of another publication?

■ It is important to determine *how* one wants to inform (means), *what* kind of information one wants to disseminate (contents focus), for *whom* it wants to do so (target audience) and *when* it wants to do so (periodicity). But *why* informing these people, on these issues, through this medium, and at that time, should also be clearly defined – and this is not done by some 65% of all media operations and projects.

## Means to achieve a mission

The means to achieve an organisation's mission vary from sector to sector. In the media the means are usually described through the medium chosen by the organisation and the way and format in which the information will be treated. This includes the decision to publish a weekly national magazine or to run a districtal community radio for instance, the choice of information treatment, genre, etc.

Of all print media with an editorial policy, only 10 clearly state that their intention is to publish a newspaper. The periodicity is never mentioned. In one case the paper states that it is a private and national newspaper. One radio station states in its editorial policy the medium they use, and two audio-visual enterprises clearly state for objective the production of documentaries and fiction films or TV and radio programmes. Otherwise, if one does not know the media organisations it is impossible to know from their mission statement whether they are print or broadcast media. And in all cases that stated a mission, it is impossible to see why they chose this medium rather than another one to achieve their mission.

**Table 22**  
**Medium identification in editorial policies**

No identification	Newspaper	Radio station	Television	Video/radio prod.
74	10	1	2	2

*From a total of 89 editorial policies or elements thereof.*

When looking at **treatment** choices, there are twelve (12) media organisations' policy stating their will to *analyse, interpret or discuss* some of the issues they cover, of which four (4) mention a *critical* approach. Others do profess their intention to denounce or expose facts such as corruption, censorship or else, but this does not necessarily involve a general and deliberate option for critical analysis.

There are also six (6) media organisations' editorial policies stating that they also practice investigative journalism (*Imparcial, Savana, Media Fax, Faisca, O Autarca* and *O Coqueiro*).

Four (4) editorial policies make mention of *educational* radio programmes, texts or video productions (*Rádio Licungo, Rádio Xai-Xai, Campeão* and *Ebano Multimedia*). However, as many as 9 editorial policies make mention of at least one educational aspect of their work.

One editorial policy says that the media gives priority to reports rather than news (*Tempo*), one that it produces a weekly synthesis of news published elsewhere (*NotMoc*) and one that it works fundamentally in the field (*Baia*). One media's editorial policy says it privileges short texts in a simple language, with illustrations (*O Campo*).

News is an important mean of achieving any media mission aiming to inform. Six (6) media are clearly setting a differentiation of news items from opinion pieces in their editorial policy (*Semanário Expresso, Media Fax, Savana, O Autarca, Correio Semanal* and *Correio da Manhã*).

In a separate question from that on the editorial policy itself, media operations were asked what place is given to news in the overall media – against editorial, readers' letters, opinion pieces, in-depth critical analysis, etc. Unfortunately, we have found that over a third of all media organisations could not tell what proportion of news, expressed in percentage, were contained in their media.

One out of five media operations responded that news represented less than 50% of their output. About half of all operational media contain at least 50% of news items, and a quarter over 70%.

Most broadcasters, video producers and newsletters are among those with the lesser rate of response to this question. The newspapers have generally answered.

**Table 23**  
**Proportion of news contents (operational)**

	1 - 20%	21 - 50%	51 - 70%	71 - 100%	N/answer
Daily newspaper	-	-	1	3	-
Weekly newspaper	-	1	4	5	1
Other newspaper	-	1	3	6	1
Newsletter	1	1	-	3	5
Magazine	1	1	1	1	3
Email media	-	-	-	2	-
Daily fax media	-	-	1	2	2
Other fax media	-	-	1	1	-
Public radio	1	1	1	-	7
Private commercial radio	-	2	-	-	-
Religious radio	4	1	-	-	3
Community radio	1	1	1	-	1
Political party radio	-	-	1	-	-
Public TV	-	1	-	1	3
Private commercial TV	-	1	-	-	-
Religious TV	-	-	-	-	1
Video advertising	-	-	-	-	1
Video documentary	-	-	-	-	1
Various video prod.	-	-	-	1	4
Multimedia	-	-	-	1	-
<b>TOTAL</b>	<b>8</b>	<b>11</b>	<b>14</b>	<b>26</b>	<b>33</b>

■ It could be concluded that, consequently to those figures, a majority of the Mozambican media is not primarily focussed on news reporting. However, these figures also indicate that non-news items such as commentary and opinion pieces could not be dominating contents as much as it has been said by some. This, however, should be further studied through content analysis.

■ The portion attributed to news is to be decided by each media operation. There is no «good answer» here, but an answer. The fact that so many operations cannot answer, however, is a sign of poor vision and strategic direction.

## Political and ethical stands

The issues of politics and ethics are not always clearly spelt out in editorial policies. However, there are often references to these issues in the policies reviewed.

Of all 89 who described elements of or handed-over their editorial policy, only 15 make a clear reference to their *independence*. Six (6) of these *do not specify from what* are they independent, although two (2) state that this independence is *total*.

The other nine (9) editorial policies do qualify their independence (10% of operational media). One states that it is independent from any political, economic, financial or other pressure forces that prejudices the normal production of journalistic information (*Correio da Manhã*). Two say that they are independent from any kind of constituted, institutional or particular powers (*Savana* and *Media Fax*). Two others follow this but state only from institutional or particular powers (*Faisca* and *O Coqueiro*), and two mention institutional (*Megajornal*) or constitutive powers (*O Autarca*).

Another editorial policy states that the media is independent, non-aligned to political parties, laic and non-confessional (*Daily Top News*). Finally, one editorial policy states that it has an orientation independent from any ideological, political, economic or religious entailment (*Notícias*).

There are five (5) editorial policies that make explicit that their journalists and/or managers are prohibited to accept *political party responsibilities and functions in other organisations* that could compromise the journalist and newspaper's independence. These are *Imparcial*, *Savana*, *Media Fax*, *Faisca*, and *O Coqueiro*. The first one also explicitly excludes governmental responsibilities, although one could argue that these are an extension of and included to political party responsibilities. These five media policies also state that they *reserve the right to refuse donations, adverts, trips and/or other forms of benefits* that may violate their editorial principles or independence.

**Table 24**  
**The notion of independence in editorial policies**

No mention of independence	Non-qualified independence	Qualified independence	No staff w/political party duties	No compromising benefits
60	6	9	5	5

*From a total of 89 editorial policies or elements thereof.*

There are nine (9) editorial policies that make an explicit commitment to the respect of *professional deontology* (*Semanário Expresso*, *Imparcial*, *Media Fax*, *Savana*, *Faisca*, *O Autarca*, *O Coqueiro*, *Rádio Pax*, and *Jornal Aro Juvenil*). Of these, six (6) also specifically mention the respect of a broader *journalism ethic* (the same media policies except first and last ones).

The notions of rigor (11), creativity (6), quality (4) and/or seriousness (2) are referred to in some editorial policies. The notion of *rigor* is present in most policies referring to ethic and deontology, plus in those of *RTP*, *Notícias*, *AIM*, *Correio Semanal* and *Correio da Manhã*.

The disputable notion of *impartiality* also appears in eleven (11) editorial policies (*O Autarca*, *O Coqueiro*, *Rádio Miramar*, *RM Gaza*, *Rádio Muhipiti*, *Rádio Terra Verde*, *Megamedia*, *Monapo*, *Namuli*, *Correio Semanal*, *Correio da Manhã*) and in the title of one publication (*Imparcial*).

**Table 25**  
**Ethical notions in editorial policies (notion recurrence)**

No ethic notion	Some ethic notion	Journalism ethic (all)	Deontology in particular	Notion of rigor	Notion of impartiality
55	20	6	9	11	12

*From a total of 89 editorial policies or elements thereof.*

## Contents focus

The focus of the media's attention are numerous: 17 editorial policies refer to *human rights* or some specific ones such as women's rights, 16 to *socio-economic matters*, 13 to *cultural matters* and 10 to *political matters*. There are 10 policies referring to *democracy*, the *national constitution* or *State of Law*.

The concept of *development* is referred to in 15 editorial policies, *gender* or women in particular are mentioned in 9, the *environment* also in 9, *youth and children* in 7.

Issues related to *health* are mentioned in 7 editorial policies, to *religion* in 6 as well, and to *sport* in 6 policies. *Peace* figures only in 4 editorial policies, while 2 policies mention *national unity*, the *fight against corruption* and the *education system*.

Only one editorial policy makes mention of *minorities*, although three others do state that they wish to protect and promote the *cultural and national diversity*.

**Table 26**

**Contents focus in media operations and projects (theme recurrence)**

Human Rights	Socio-econ. matters	Cultural matters	Political matters	Development Matters	Democracy matters
17	16	13	10	15	10
Gender & women	Environment matters	Youth & Children	Health matters	Religion matters	Sport matters
9	8	7	7	6	5

*From a total of 89 editorial policies or elements thereof.*

Themes are important, but the territorial context of these themes is also. Does one focus on socio-economic matters around the world, or in Mozambique specifically? Around Mozambique, or around a specific province? Less than a third of editorial policies (26) make mention of the *territorial focus* of their information coverage. Of all 36 'national' media operations in the country, only 9 have an editorial policy clearly stating that their focus is on *Mozambique*.

There are also 2 policies stating that their focus is on *Mozambique and Southern Africa*, and 3 others on *Mozambique and other countries* in general. There are 5 editorial policies focusing on their *district* or locality, 3 on their *province*, also 3 on both their *province and the country* as a whole, and one on the *Central Provinces*.

## Target audience

Target audience is mentioned in only 21 editorial policies, in which cases it is often well defined and fairly specific (ex.: rural population in the province of Inhambane, management in State and private sectors in Mozambique, young students in Niassa province, churches associated to the Christian Council of Mozambique, etc.).

It is however interesting to note that reference made to the public is at times constructed in a non-traditional manner, as a social actor that communicates, produces information or makes the news and not simply as a passive receiver of information. In five (5) cases, editorial policies also establish the public's rights, once it



becomes the subject of information, and state that they will respect citizens' privacy right.

#### **Figure 4**

#### **Samples of audience's role in editorial policies**

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Five newspapers' editorial policies state a commitment to a large reader's participation: *Media Fax, Savana, Baia, Faisca, O Coqueiro*.

Several community radio's editorial policies state a desire to improve communication within the community or to communicate with the community: *ICS Community Radio Stations*

A religious station's policy states that it gives a voice to the poorest and most oppressed who are subjects and not objects of social analysis: *Rádio Pax*.

A university paper wants to bring higher education to civil society and civil society to higher education: *O Universitário*

A human rights publication wishes to contribute to deepen citizens' participation to socio-political life, etc.: *Democracia Direitos Humanos, boletim da LDH*

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*From a total of 89 editorial policies or elements thereof.*

Besides what is said about target audiences in editorial policies, all interviewees were also asked to describe their audience during the field research.

Many media organisations (12%) responded that it was a general public within a geographical territory as sole specificity. They were 14 in this case (ex.: Maxixe and Inhambane residents, or northern provinces residents).

More answers stating a geographical delimitation also included other details (12%). Some specified that their public in their given territory was rural (5), or from a specific language group (3), or from a specific profession or religion (2), or disposing of a specific access like being literate or having a TV (2) or combining more determinants with the geographic delimitation (1).

The majority of answers did not state specific territorial limits but were otherwise specific (41%). For these 46 media organisations, an audience could be rural (3), or a literate group or with a specific level of education (8), or a social class (16). It could be an age, gender, professional, religious, or interest group. It could also be a marginalised group (6). This latter group includes descriptions such as: discriminated women, public with no access to information, marginalised people, and one listing the sick, detained, drugged, and poor area residents.

It is interesting to note here that the group we label 'social class' is the most common as target audience, with 16 respondents. Three (3) of these audiences are described as *peasants or small farmers*, which we believe different than *rural*. The other thirteen (15) target audiences are summarising in various ways the Mozambican elite. The terms most commonly used to describe this group are: embassies, private businesses, state institutions, politicians, leaders and decision-makers, NGOs, intellectuals, UN agencies, higher education students. They come invariably in an enumeration of at least three of these together.

Another group of respondents (11%) is cross-categorising or summing its audience, without reference to geographical territory. This can give a confused idea of an audience when described as: professors, youth, politicians and workers; rural, illiterate, and urban youth with education; rural and urban from 19 to 40 years old. In some other instances, the definition has its logic: business people, workers and literate public or youth and adults, rural and urban – meaning a general public; or is fairly specific: professors, students, governmental institutions; women and girls; peasants and community leaders.

Finally, an important number of media organisations (24%) did not qualify their answer. They describe their audience as the general public – even when they are known to be a provincial or districtal media operation or project. They were 21 in this case and their short answers varied little: general, society in general, all citizens, all Mozambican society, everybody.

**Table 27**

**Target audience of media organisations**

General & territory	Specific & territory	Specific no territory	++ Specific no territory	General no territory
12%	12%	41%	11%	24%

*From all 111 media operations and projects surveyed.*

- The insufficient vision with regards to circulation and coverage is reflected here with 76% of audiences described without any territorial delimitation.
- The fact that 24% of all respondents were unable to give a qualified answer to the question of their target audience is a worrying sign of these organisations' ability to articulate their vision and constitutes a risk for their long-term sustainability.
- Furthermore, the fact that only 15% of all media operations and projects were able to hand-over a written editorial policy is another concern for the other media organisations. The proportion of written or verbal answers is higher among well-established media operations than among new media operations and projects. This could indicate that the vision of an organisation develops through practical experience of successes and failures. It could also tend to prove that a clear vision is a factor of success. In any case, it is never too late to articulate, further articulate or re-articulate one's vision.

## Strategic plans of media organisations

When asked whether they have a strategic plan, most organisations answered that they do but very few of them can actually hand over a copy of it. About a quarter of media operations answered that they do not have a strategic plan, or simply did not answer the question.

It is possible that some respondents did not know what was meant by *strategic plan*, being unfamiliar with the term if not the exercise itself. In this case, it is unknown whether field researchers attempted to describe what was meant – if they had any better idea themselves.

This methodological concern emerged in the ultimate days of this report's redaction, spurred by the reaction to two media management courses organised by the author for the UNESCO/UNDP Media Development Project and Forum Mulher. For some participants, all media editors and managers, the preparation of a strategic plan was an entirely new notion and exercise – an exciting and empowering discovery according to them.

In any case, during the survey, the best scoring sectors in terms of the proportion of media operations having said that they do have a strategic plan are the daily and weekly newspapers, email media, community radio stations, public televisions, and

video producers. However, when looking at these sectors again for those who actually handed-over a written strategic plan, they no longer score better than other sectors.

**Table 28**  
**Strategic plans in media operations**

	TOTAL	Have such plan			Gave a copy	
		Yes	No	S/Info	Yes	No
Daily newspaper	4	3	-	1	-	3
Weekly newspaper	11	9	1	1	1	8
Other newspaper	11	7	4	-	1	6
Newsletter	10	6	3	1	-	6
Magazine	7	4	3	-	1	3
Email media	2	2	-	-	-	2
Daily fax	5	3	1	1	-	3
Other fax	2	1	-	1	1	-
Public radio	10	5	2	3	1	4
Commercial radio	2	1	1	-	-	1
Religious radio	8	5	2	1	-	5
Community radio	4	3	1	-	1	2
Political party radio	1	-	1	-	-	-
Public TV	5	4	-	1	-	4
Commercial TV	1	-	1	-	-	-
Religious TV	1	1	-	-	-	1
Video Advertising	1	-	1	-	-	-
Documentary video	1	1	-	-	-	1
Various video prod.	5	4	1	-	-	4
Multimedia	1	1	-	-	-	1
<b>TOTAL</b>	<b>92</b>	<b>60</b>	<b>22</b>	<b>10</b>	<b>6</b>	<b>54</b>

Across the provinces, Gaza distinguishes itself for being the province where all three existing media operations have and handed-over a written strategic plan. Among all 46 media operations present in Maputo city, 63% declared having a strategic plan but only one (a magazine) handed-over a written copy.

From such little information gathered, no major conclusion can be formulated. One can only assume that several of those who answered positively to the question may not have any strategic plan despite them not saying so.

### Development and expansion plans of media organisations

The absence of any plan to develop or increase coverage is even more pronounced than that of a strategic plan, among media operations. Just over half of them (57%) do have such plan – most of which have described it. There is little chance that respondents did not understand this question.

It is surprising that several commercial operations do not plan for an expansion of their market. This is the case for about half – or more – of the weekly newspapers, other newspapers, daily fax newspapers, video producers, commercial TV, etc. When looking back at the ambitious target audiences and lack of coverage information offered by most media operations, it is surprising to not find more plans for expansion.

The broadcasting sector scored a little better than average (59%) among those planning for an increased coverage, among which nearly all the religious radio stations, most public TV broadcasters, and nearly half of the public radio stations.

In the print sector, almost all magazines, daily newspapers and daily fax media also plan for expansion. But in average, only 55% of print media operations have such plans.

- It should be noted that several of those describing an expansion plan are contextualising such plan within financial constraints. Similar constraints may explain the absence of any plan among other operations. Nevertheless, those with a plan or some idea on the subject have probably more chances to achieve any sort of audience development.
- The fact that the proportion of these with or without expansion plans do not vary between Maputo city and the other provinces is a clear sign that the economic environment and end market have little impact on an organisation's ability to project itself in the future and imagine ways to enlarge its audience.

## **Legal environment and status of media organisations**

The legal status and environment of media operations have little to do with their vision and strategic direction it could be argued. However, it appeared important to see how many surveyed media organisations could answer this question – meaning they gave some thought to it – and to see how many were unsatisfied in this regard and whether they were able to articulate why.

It is our view that the legal status and environment of media organisations have an impact on their sustainability potential and therefore their ability to articulate a problem in this area – when there is one – seems relevant in terms of their vision. In some countries, the legislative environment prevents some media projects to come to existence, or media operations to grow or even survive. All surveyed organisations' answers are therefore including here – not only those of the operational ones.

### **Legislative environment**

All media operations and projects (111) were asked to say whether they are satisfied or not with the current legislative environment. Looking at their answers, it is found that 14% of respondents did not answer to the question either because they have no opinion on the matter or because, as some said, it is difficult to give a clear-cut answer.

The question formulation required an unambiguous answer, Yes or No. In a subsequent question they were asked to justify their answer if it had been No. Some who did not respond to the first question did so then.

Among those who answered the first question, about two thirds of the respondents said that they were satisfied with the legislative environment, and a third said they were not satisfied. The proportion of dissatisfaction increases in the city of Maputo, where there are more media operating for a longer time (not shown here, please refer to Annexe J). It is also higher among the broadcast media and the newspapers of other periodicity than dailies and weeklies.

- The reasons given for dissatisfaction are broadly falling in two categories: those related to tax legislation and those related to media regulation.

- The tax legislation category includes all forms of dissatisfaction with the current taxation system, as applied to import duties, added valued tax on sales, taxation on advertising income even when no actual profit is made, the public radio tax, etc.
- The media regulation category of dissatisfaction includes comments on the unclarity surrounding radio and TV criteria for license or frequency allocation, the concern towards foreign-controlled broadcasters' access to airwaves (religious or else), the lack of definition and spectrum reservation for specific categories of broadcasting, etc.
- Several critical comments were accompanied of positive ones, showing a *generally high regard* for the constitutional and legislative protections of the freedom of expression and freedom of the press.

**Table 29**  
**Satisfactory perception of legislative environment and status**

All	Legislative environment			Legal status		
	Yes	No	N/answ	Yes	No	N/answ
Daily newspaper	4	-	-	3	1	-
Weekly newspaper	9	4	-	9	1	3
Other newspaper	5	7	1	10	2	1
Newsletter	7	2	3	5	2	5
Magazine	7	-	-	6	1	-
Email media	-	2	-	1	-	1
Daily fax	3	2	1	5	1	-
Weekly fax	-	-	-	-	-	-
Other fax	2	-	-	2	-	-
Public radio	5	2	3	8	-	2
Commercial radio	1	2	-	2	1	-
Religious radio	4	3	1	5	1	2
Community radio	6	-	6	5	-	7
Political party radio	1	-	-	1	-	-
Public TV	4	1	-	5	-	-
Commercial TV	-	1	-	1	-	-
Religious TV	1	-	-	-	-	1
Other TV	-	-	-	-	-	-
Video Advertising	1	-	-	1	-	-
Music video	-	-	-	-	-	-
Documentary video	-	1	-	-	-	1
Various video prod.	1	4	-	4	1	-
Multimedia	3	1	-	4	-	-
<b>TOTAL</b>	<b>64</b>	<b>32</b>	<b>15</b>	<b>77</b>	<b>11</b>	<b>23</b>

## Legal status

When looking at the media's opinion of their respective status (same table above), a higher level of satisfaction is found but also a higher level of respondents did not answer the question (21%). As this question would normally apply to operational media organisations, those who did not answer correspond mostly to projects not yet registered, i.e. without legal status.

Again this question was followed by another one requesting details from those who answered that they are dissatisfied with their legal status. Their second answers match their previous comments on the legal environment.

- Some deplore the fact that, in the light of their current legal status, they are considered as a private commercial operation when they are actually more a non-profit community one. They argue that non-profit entities should be registered as such and benefit from tax exemptions.
- Others pointed out that their media does not exist in the legislation: those distributed through fax, email or Internet. They therefore do not fit their current status. They highlighted that, given their mode of circulation, their telecommunication costs are high and they should benefit from some preferential rates from the Telephone Company, as customers actually providing an information service to the public.

## Vision factors of media pluralism entrenchment

This chapter presented our findings regarding one aspect of the entrenched character of media pluralism in Mozambique: the sustainability potential of media organisations, assessed through their ability to articulate their vision. In conclusion it can be observed that:

- Governance is another area through which vision and strategic direction should be assessed. Although some data has been gathered around the existence and meetings' periodicity of board of directors and management committees in media operations, time has not permitted the treatment and analysis of this data.
- Key instruments to articulate a media organisation's vision and strategic direction, such as an editorial policy and mission statement, are apparently present in a written form in very few cases. Most media organisations can elaborate on the matter verbally but generally not in a comprehensive manner.
- Probably as a result of their insufficiently articulated vision, many media operations are unable to develop strategic or expansion plans to actually achieve their main objectives and have an impact on their target audience.
- Lack of clarity within several media organisations around issues such as their target audience, and therefore the strategy to reach it, are probably impacting on their effective readership or audience and on their ability to measure it. Likewise, lack of clarity around main objectives may partly explain the inadequate legal status and/or registration of some media organisations and the inability of many to say whether they have commercial, profit-driven aims, or whether they are not for profit.

- There are media operations, in each of the media sub-sectors, that demonstrate a strong potential for sustainability in terms of the 'vision factors' examined here. This is an encouraging sign that media pluralism can be sustainable and entrenched in Mozambique. However, too few of these operations are located and/or reaching audiences *out of* Maputo City.





## Securing and managing resources for Sustainability

A dynamic and challenged media sector

### Organisational effectiveness of media operations

The following model shows how sustainability is at the heart of organisational effectiveness. The previous chapter reviewed the media surveyed in the light of one key element of sustainable media organisations, their vision and strategic direction. This chapter will examine their performance in relation to other key elements of sustainability, those related to their ability to mobilise and manage resources to operationalise their mission, effectively and consistently over time.

**Figure 5**  
**Organisational factors which impact on sustainability**



*From PACT's Participatory monitoring, evaluation and reporting: An organisational development perspective for South African NGOs. Adaptation to Lisa Cannon's sustainability definition by MH Bonin.*

The first key resource that media organisations should mobilise and manage to ensure their sustainability is the human resource. This study offers some information on the numbers, gender and qualifications of the people that make the media in Mozambique. The editors and managers interviewed shared this information. It does not provide an external expert opinion of the human resource in question. It does, however, provide a true reflection of the media's own perception on the matter.

## Human resource and Gender in media operations

### Personnel employed

According to the figures given to our field researchers, the media sector employs an important number of people in the country at the moment. These would reach close to 1450 in total, across all sectors, provinces and types of position – free-lancers not included.

Of these, half are journalists or reporters and editors or directors. Nearly half of all media personnel is employed in Maputo. Media personnel are mostly found in the public radio broadcaster, the daily newspapers, the public television broadcaster, the weekly newspapers and the newspapers other than dailies and weeklies.

It is interesting to note that 60% of all media personnel is employed by only 32% of all media operations, leaving a large group of media operations with few employees.

**Table 30**  
**Employed personnel in media operations**

	Operations	Employees		
	Total	Total	M	F
<b>Print media</b>				
Daily newspaper	4	198	174	24
Weekly newspaper	11	141	113	28
Other newspaper	11	125	105	20
Newsletter	10	37	22	15
Magazine	7	134	88	46
Email media	2	10	7	3
Daily fax	5	43	34	9
Other fax	2	10	7	3
<b>Broadcast media</b>				
Public radio	10	344	274	70
Commercial radio	2	15	11	4
Religious radio	8	69	51	18
Community radio	4	29	20	9
Political party radio	1	23	16	7
Public TV	5	187	149	38
Commercial TV	1	8	5	3
Religious TV	1	8	8	-
Video Advertising	1	7	4	3
Documentary video	1	9	6	3
Various video prod.	5	41	30	11
Multimedia	1	9	8	1
<b>TOTAL</b>	<b>92</b>	<b>1447</b>	<b>1132</b>	<b>315</b>

In the print sector, the weekly newspapers appear poorly staffed comparatively to the daily newspapers. However, a daily production does entail more work than a weekly and would require more staff.

Likewise, the community radio stations are operating with an average of 7 employees, while public radio broadcasters employ in average 34 employees. And the commercial and religious television stations employ in average 8 people while public televisions employ 37 people in average.

- The gaps observed in staffing of comparable media operations are considerable and can only diminish the organisational capacities of those with much less personnel. Some operations have probably become experts at making the most of their staff and their low numbers suggest high productivity. The strain imposed over the human resource is however a factor playing against long-term sustainability. It can lead to loss of motivation, high turnover and organisational destabilisation.

## Media volunteers

Human resource is often understood as employed and permanent personnel. However, media activism experience has shown that volunteers count for an important part of media personnel in several cases.

**Table 31**  
**Volunteer media personnel in media operations**

	Operations	Volunteers		
	Total	Total	M	F
<b>Print media</b>				
Daily newspaper	4	-	-	-
Weekly newspaper	11	11	9	2
Other newspaper	11	35	28	7
Newsletter	10	30	20	10
Magazine	7	3	3	-
Email media	2	4	1	3
Daily fax	5	4	1	3
Other fax	2	1	1	-
<b>Broadcast media</b>				
Public radio	10	-	-	-
Commercial radio	2	4	3	1
Religious radio	8	175	98	77
Community radio	4	39	23	16
Political party radio	1	5	-	5
Public TV	5	2	1	1
Commercial TV	1	8	5	3
Religious TV	1	-	-	-
Video Advertising	1	-	-	-
Documentary video	1	-	-	-
Various video prod.	5	3	2	1
Multimedia	1	6	4	2
<b>TOTAL</b>	<b>92</b>	<b>330</b>	<b>199</b>	<b>131</b>

We have seen how significant is the employment gap when comparing public radio to religious and community radio. However, a look at the number of volunteers working in these stations shows that the average number of employees and volunteers in

religious radio stations (30) almost matches the average number of employees in public radio stations (34). This would indicate that religious radio stations have the ability to mobilise as much human resources as the public radio stations, although they do not pay as much salaries. Should the religious stations be able to sustain this level of voluntarism, their sustainability potential in term of human resources would appear as good as that of the public stations.

When looking at the community radio stations, however, the situation differs, as the average number of paid and volunteer personnel in these stations is only 19. This apparent unbalance could be a worrying sign for their sustainability potential, unless these stations broadcast significantly fewer hours per week than the religious and public ones.

When comparing religious and community radio stations, one notices that the latter appear unable to employ as many paid staff in average (7,2 against 8,6 per station). They also seem to mobilise a considerably lower number of volunteers in average (9,8 against 21,9 per station). This could suggest that community radio stations have a definite skill to achieve a lot with little human resource. But it could also indicate a long-term risk for their sustainability if their human resource is over-worked, leading to a likely high staff turnover, low sustained development of skills and poor community involvement – and therefore poor community ownership.

Considering that Community Radio constitutes one of the components of the UNESCO/UNDP Media Development Programme, a closer look at the human resource profile of both community and religious radio stations appeared necessary. In this perspective, the figures referred to above were broken down into provincial profiles, in order to ascertain the previous observations.

Interestingly, it appears that religious radio stations, in average, do not mobilise as many volunteers at it first seemed. In fact, once one radio station based in Maputo Province is put aside, the seven other religious stations mobilise in average just a little more volunteers (10,7) than the average community radio station does (9,8). The case of the religious station in Maputo Province is a little dubious. How can possibly two employees succeed in mobilising and co-ordinating the work of as many as 100 volunteers?

Analysing the community radio stations' figures, one immediately notices than the average of 9,8 volunteers per stations is not representing properly the actual situation within stations. In fact, a new ICS station in the province of Tete seems to be unable to mobilise a single volunteer. Once this station is set aside, the remaining three stations are rather mobilising in average 13 volunteers each – a number even higher than the average within religious stations other than the station based in Maputo province.

**Table 32**  
**Media volunteers in religious and community radio stations**

	TOT	C_D	GAZ	INH	M_C	MNC	MPT	NAM	NIAS	SOF	TET	ZAM
<b>Religious radio</b>												
Stations	8	-	-	-	2	-	1	1	-	2	1	1
Employees	69	-	-	-	22	-	2	21	-	24	-	-
Volunteers	175	-	-	-	7	-	100	5	-	45	9	9
<b>Community radio</b>												
Stations	4	-	1	-	-	-	1	-	-	-	1	1
Employees	29	-	11	-	-	-	6	-	-	-	3	9
Volunteers	39	-	17	-	-	-	10	-	-	-	-	12

■ Therefore, there does not seem to be a volunteer problem in community radio stations, except perhaps in the new one based in Tete, which is beginning on fragile grounds with no volunteers at all. The main human resource challenge, for both community and religious stations, is in fact to operate with a generally smaller staff (paid and volunteer) than that in the public radio stations and, consequently, to sustain their participation to the station.

■ This challenge, in extreme cases, could represent an obstacle to the long-term sustainability of the stations at stake. However, in most cases, it could constitute a community station's strength compared to most public stations, both in terms of creativity, manageability, and productivity of the teams involved. In addition, volunteers contribute to ensure a broader representation of the community.

A few last observations can be made concerning media volunteers, this time in the print sector. While it can be seen that much less volunteers are working in the print media, there are some 113 of them, including 76 involved in weekly newspapers, newspapers other than dailies and weeklies, and in newsletters. As volunteers in these three types of publications outnumber the others in the print media, it is worth some attention.

The 'other' newspapers' media personnel for instance is composed of 22% of volunteers and only 78% of paid staff members. The newsletters' personnel are even more dependent on volunteers, which represent 45% of all human resource involved. This is an indicator of the high level of commitment mobilised by those publications, a section of the media not commonly considered among the community or participatory media operations.

As newsletters are often published by institutions, it is surprising to see how much volunteer involvement they require to operate and it could indicate financial problems. In the case of the 'other' newspapers, many of which are recent initiatives in the provinces, this volunteer involvement is a healthy sign of the community support they enjoy but may also be an indicator of their financial fragility.

Contrary to all community and most religious radio stations, these newspapers are usually private commercial ventures that probably either did not count with community voluntarism as an essential component of their success, or did not intend to be commercial businesses when they registered. A lack of registration options or access to appropriate information could explain the latter.

**Table 33**  
**Media volunteers in some publications**

	TOT	C_D	GAZ	INH	M_C	MNC	MPT	NAM	NIAS	SOF	TET	ZAM
<b>Weekly newspapers</b>												
Publications	11	-	-	2	6	1	1	-	1	-	-	-
Employees	141	-	-	9	117	5	6	-	4	-	-	-
Volunteers	11	-	-	3	-	8	-	-	-	-	-	-
<b>Other newspapers</b>												
Publications	11	1	1	1	5	-	1	-	1	-	-	1
Employees	125	8	10	15	82	-	3	-	5	-	-	2
Volunteers	35	-	8	3	19	-	5	-	-	-	-	-
<b>Newsletters</b>												
Publications	10	-	-	1	4	-	-	1	-	2	-	2
Employees	37	-	-	1	15	-	-	6	-	13	-	2
Volunteers	30	-	-	3	1	-	-	5	-	21	-	-

## Media free-lancers

As peculiar as it may seem, in numbers, free-lancers come after volunteers in the media sector. In media operations they are in average, per month, 165 in total, against 330 volunteers and 1447 employees.

This is quite a surprise to us. That they are less numerous than volunteers are, and that they are so much less numerous than employees are. After all, in many parts of the world, the media sector is increasingly made up of free-lancers. In any event, if this is the case in Mozambique, not many of them get work. At least, not on a monthly basis.

More than half of all free-lancers work in Maputo City (61%), mostly in the print sector, or else in radio broadcasting or various video producers. In other provinces, radio broadcasters employ nearly all free-lancers. Free-lancers are almost unknown in some provinces, as in Cabo Delgado, Manica and Maputo Province.

The free-lancers' employers are mainly, in decreasing order, the public radio broadcasting service, weekly newspapers, magazines, daily fax newspapers, religious radio stations, producers of various kinds of video and email media.

However, this is not true for women. The public radio stations do employ an average of 41 free-lancers per month but only one of them is a woman. Likewise, the weekly newspapers that employ an average of 30 free-lancers a month employ only 4 female free-lancer. The same can be said of some producers of various video concerning their 13 monthly free-lancers of which only one is a woman.

**Table 34**  
**Free-lance media personnel in media operations**

	Operations	Free-lancers		
	Total	Total	M	F
<b>Print</b>				
Daily newspaper	4	-	-	-
Weekly newspaper	11	30	26	4
Other newspaper	11	9	6	3
Newsletter	10	1	1	-
Magazine	7	18	11	7
Email media	2	12	3	9
Daily fax	5	15	7	8
Other fax	2	-	-	-
<b>Broadcasting</b>				
Public radio	10	41	40	1
Commercial radio	2	2	2	-
Religious radio	8	14	8	6
Community radio	4	5	3	2
Political party radio	1	-	-	-
Public TV	5	1	1	-
Commercial TV	1	2	2	-
Religious TV	1	-	-	-
Video Advertising	1	2	2	-
Documentary video	1	-	-	-
Various video prod.	5	13	12	1
Multimedia	1	-	-	-
<b>TOTAL</b>	<b>92</b>	<b>165</b>	<b>124</b>	<b>41</b>

*Average per month*

## Gender distribution of personnel

The previous tables on media personnel have shown that women are less represented than men among media personnel, including employed staff, volunteers and free-lancers. This is almost invariably the case.

**Table 35**

**Total gender balance in all media personnel (operational)**

	M	F
Proportionally	75%	25%
Numerically	1.455	487

- Across all sectors and provinces, including employed staff, volunteers and free-lancers women represent in average only 25% of all media personnel.
- As in the overall average above, women form only 25% of all free-lancers employed every month. The main employers of female free-lancers are the email media, daily fax media, magazines, and religious radio stations.
- Among permanent employees, women represent even less than the overall average: 22%. The media sectors whose female employees represent at least 30 % of their permanent staff are, in decreasing order, video advertising, magazines, newsletters, commercial TV stations, documentary video producers, community radio, email media, daily fax and a political party's radio.

The picture per province (please refer to Annexe J) is consistent with the average female employment rate. Only four provinces count a female employment-rate superior to 22% and none is exceeding 30%: Zambezia, Manica, Gaza and Maputo Province.

- When looking at media volunteers, the situation is suddenly different. As often observed in other countries, including western ones, women are much better represented among unpaid staff. In Mozambique, female volunteers represent in average 40% of all volunteer personnel, and often much more.

Women form the *majority* of volunteers in three sectors: email media, daily faxes, and one political party's radio. They are even with men or above the 40% average in public TV and religious radio stations (decreasing order).

The sectors where women represent less than 40% of all volunteers are, in decreasing order, commercial TV, various video production, multimedia, newsletters, other newspapers and weekly newspapers.

The provinces where women are volunteering more than the national average are Maputo Province, Niassa, Sofala and Tete. In none of the provinces they represent more than 50% of all volunteer personnel.

**Table 36**  
**Female representation among all media personnel**

	% of employees		% of volunteers		% of freelancers	
	M	F	M	F	M	F
<b>Print</b>						
Daily newspaper	88	12	-	-	-	-
Weekly newspaper	80	20	82	18	87	13
Other newspaper	84	16	80	20	67	33
Newsletter	60	40	67	33	100	-
Magazine	59	41	100	-	61	39
Email media	70	30	25	75	25	75
Daily fax	79	21	25	75	47	53
Daily fax	70	30	100	-	-	-
<b>Broadcasting</b>						
Public radio	80	20	-	-	98	2
Commercial radio	73	27	100	-	100	-
Religious radio	74	26	56	44	57	43
Community radio	69	31	59	41	60	40
Political party radio	70	30	-	100	-	-
Public TV	80	20	50	50	100	-
Commercial TV	63	37	63	37	100	-
Religious TV	100	-	-	-	-	-
Video Advertising	57	43	-	-	100	-
Documentary video	67	33	-	-	-	-
Various video prod.	73	27	67	33	92	8
Multimedia	89	11	67	33	-	-
<b>TOTAL</b>	<b>78%</b>	<b>22%</b>	<b>60%</b>	<b>40%</b>	<b>75%</b>	<b>25%</b>

### Gender distribution among editors and journalists

The under-representation of women among media personnel, especially among permanent employees, is even more pronounced in a key employment category such as that of journalists and reporters. The proportion of women among this category is below the 22% average in the sector and only reaches 16% nationally.

Zambezia is the only province that presents an equal gender balance among its journalists and reporters. The media sectors employing the lowest proportion of female journalists are the daily newspapers (5%), daily fax media (7%), public television broadcasters (11%), magazines (11%) newsletters (13%) and weekly newspapers (13%).

This national imbalance reflects itself every time short-term courses are organised for practising journalists in this country, including those organised for the UNESCO/UNDP Media Development Project, where there are rarely more than 20% female attendance.

Strangely enough the proportion of women among editors and directors is a little better, even slightly above the 22% average in the sector, with a 23% representation. Such stronger representation of women in management can be attributed to religious and community radio stations, public television broadcasters and producers of various videos. However, the average female representation remains low and clearly insufficient to turn around the gender imbalance that exists in employment in the sector.



**Table 37**  
**Gender distribution in some employment categories (oper.)**

	Editors and directors		Journalists and reporters	
	Male	Female	Male	Female
C Delgado 1	2	-	5	-
Gaza	3	-	17	5
Inhambane	13	3	12	2
Maputo City	110	17	262	39
Manica	4	1	14	3
Maputo	7	-	7	2
Nampula	23	5	23	7
Niassa	6	15	14	5
Sofala	21	-	41	6
Tete	8	1	11	-
Zambezia	5	3	14	11
<b>TOTAL</b>	<b>202</b>	<b>45</b>	<b>420</b>	<b>80</b>

	Editors and directors		Journalists and reporters	
	Male	Female	Male	Female
<b>Print media</b>				
Daily newspaper	11	-	69	4
Weekly newspaper	20	-	69	10
Other newspaper	36	4	85	19
Newsletter	8	2	7	1
Magazine	11	2	16	2
Email media	2	1	4	1
Daily fax	7	1	14	1
Other fax	3	1	2	-
<b>Broadcast media</b>				
Public radio	41	4	60	18
Commercial radio	3	-	-	-
Religious radio	18	7	19	9
Community radio	4	2	14	6
Political party radio	-	-	4	-
Public TV	23	14	39	5
Commercial TV	2	-	-	1
Religious TV	-	-	5	-
Video Advertising	1	1	-	-
Documentary video	2	1	2	1
Various video prod.	7	4	3	1
<b>Multimedia</b>	3	1	8	1
<b>TOTAL</b>	<b>202</b>	<b>45</b>	<b>420</b>	<b>80</b>

1. As a reminder, RM Cabo Delgado has not been surveyed by this study, but we know of at least one female journalist in its Pemba station.

As we concluded this part on the gender distribution of media personnel, we obtained some background information concerning the actual journalism skills available in the country in recent years, per gender. The *Escola de Jornalismo* graciously assisted us with some revealing figures.

It should be noted that students are admitted to the national School of Journalism after completing nine years of schooling. All students trained between 1988 and 1994 obtained their diploma from the School of Journalism after only one year of training,

equivalent to a 10<sup>th</sup> grade, then considered as the mid-level of education. From 1994 to date, the diploma is obtained after three years of training at the same School. It is therefore equivalent to a 12<sup>th</sup> grade, now considered as the mid-level of education.

**Table 38**  
**Mozambique School of Journalism – 1989 to 1999 (10 years)**

	Male Students	Female Students	Total Students
Registered Students	156	28	184
Graduated Students	88	19	107

Source: Mr. Feliciano, Academic Director, Escola de Jornalismo, Maputo, April 1999.

Considering that over the past ten years a greater proportion of female than male students actually graduated from the national journalism school, thus showing a great commitment or ability on the part of women studying journalism, the current representation of women among journalists is an appalling situation.

Given the additional fact that a large number of new media enterprises were created after the reforms introduced and the peace accord signed in 1992 in Mozambique, a number of new jobs have been created during the same period. These new positions should have begun to redress the overall gender imbalance in media personnel.

**Table 39**  
**Gender distribution of media personnel per education level (all)**

	PRIMARY			SECONDARY			HIGHER		
	TOT	M	F	TOT	M	F	TOT	M	F
<b>Print media</b>									
Daily newspaper	56	50	6	90	83	7	7	5	2
Weekly newspaper	21	18	3	101	84	17	24	19	5
Other newspaper	2	2	-	63	50	13	28	24	4
Newsletter	8	4	4	21	7	14	6	4	2
Magazine	1	1	-	43	33	10	10	5	5
Email media	3	3	-	1	-	1	3	1	2
Daily fax	3	2	1	22	19	3	3	3	-
Weekly fax	-	-	-	-	-	-	-	-	-
Other fax	-	-	-	10	7	3	1	1	-
<b>Broadcast media</b>									
Public radio	102	86	16	236	192	44	3	2	1
Commercial radio	1	-	1	21	21	-	-	-	-
Religious radio	14	14	-	115	75	40	5	4	1
Community radio	32	24	8	58	33	25	8	4	4
Political party radio	-	-	-	31	19	12	-	-	-
Public TV	7	6	1	47	42	5	2	2	-
Commercial TV	-	-	-	-	-	-	-	-	-
Religious TV	1	-	1	8	8	-	-	-	-
Other TV	-	-	-	-	-	-	-	-	-
Video Advertising	1	1	-	6	4	2	1	-	1
Music video	-	-	-	-	-	-	-	-	-
Documentary video	1	-	1	7	5	2	1	1	-
Various video prod.	10	10	-	24	15	9	6	4	2
<b>Multimedia</b>	-	-	-	10	4	6	3	1	2
<b>TOTAL</b>	<b>263</b>	<b>221</b>	<b>42</b>	<b>914</b>	<b>701</b>	<b>213</b>	<b>111</b>	<b>80</b>	<b>31</b>

- The low representation of women in the media sector can be attributed to social, cultural and family environments that could, on the one hand, make the profession unknown or unappealing to young women and, on the other hand, make female professionals underemployed.
- The current gender imbalance in media personnel calls for further investigation of the situation to develop effective strategies and measures to increase women's entry to the profession, both at the level of the national school of journalism, professional training courses, permanent employment and free-lance opportunities.
- There is a need for new studies mapping the media practitioners' academic and professional training background, from institutions in and out of the country, in journalism studies or other fields.

## Gender parity and gender equality

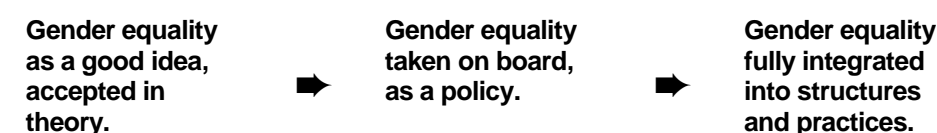
Gender parity and gender equality are two different concepts. This study has demonstrated that gender parity has not been achieved in media organisations, i.e. the participation of women as permanent employees, volunteers and free-lancers is numerically limited to 22% of all involved, in average.

Some authors argue that once a critical mass of about 30 to 35% women in the organisation is achieved, including at decision-making level, the organisation as a whole becomes more accountable to the specific needs and interests of women. If this were true, Mozambican media organisations would be making progress in the right direction.

Furthermore, while a better female representation should be achieved in numerical terms, it is also important that the organisation be «gender committed», i.e. translating its gender equality policy in practice at all levels – including editorial policy and contents, employment conditions, working relations, decision-making processes, and internal organisational development.

This does not happen overnight and involves a process to which the very top levels of the organisation shall be committed at every stage:

**Figure 6**  
**Gender commitment process in organisations**



*From Gender and Organisational Change*

This process towards greater gender equality or rather ideas around it are further discussed in Chapter 7, together with the issue of gender equality within media operations and in the profession generally.

## Skills problems in media operations

Beyond the strict mobilisation of personnel in numerical terms – permanently employed, volunteer or free-lance, representing both women and men – an important condition for sustainability is the ability to mobilise appropriate and qualified personnel.

Media operations and projects' representatives were asked to say whether they are satisfied or not with the level of skills within their organisation. They were also invited to provide some details concerning the level of qualification of the skills available to their organisation and the skills problems they encounter.

A greater number of media operations have expressed their satisfaction towards their male personnel's skills than towards their female's ones. However, a greater number have also not responded to the question regarding their female personnel, although only one media operation has no female employees (a religious television broadcaster).

**Table 40**  
**Satisfactory perception of skills per gender and sector (oper.)**

	Operations Total	Female			Male		
		Y	N	N/A	Y	N	N/A
<b>Print media</b>							
Daily newspaper	4	2	2	-	2	2	-
Weekly newspaper	11	6	3	2	6	5	-
Other newspaper	11	4	3	4	5	5	1
Newsletter	10	6	1	3	7	1	2
Magazine	7	3	1	3	4	1	2
Email media	2	1	1	-	2	-	-
Daily fax	5	3	2	-	4	1	-
Other fax	2	-	2	-	1	1	-
<b>Broadcast media</b>							
Public radio	10	8	1	1	10	-	-
Commercial radio	2	-	2	-	-	2	-
Religious radio	8	6	1	1	5	1	2
Community radio	4	3	1	-	3	1	-
Political party radio	1	1	-	-	1	-	-
Public TV	5	4	1	-	4	1	-
Commercial TV	1	-	1	-	-	1	-
Religious TV	1	-	1	-	-	1	-
Video Advertising	1	1	-	-	1	-	-
Documentary video	1	-	1	-	1	-	-
Various video prod.	5	2	1	2	4	1	-
<b>Multimedia</b>	1	1	-	-	1	-	-
<b>TOTAL</b>	<b>92</b>	<b>51</b>	<b>25</b>	<b>16</b>	<b>61</b>	<b>24</b>	<b>7</b>

■ When respondents who did not answer the question are excluded, it is found that 28% of media operations are unsatisfied with the skills of their male personnel, and 33% are unsatisfied with those of their female personnel.

■ All categories of newspapers (daily, weekly and other) are generally equally unsatisfied with the skills of their male and female personnel, and generally more unsatisfied than other media operations.

- The broadcasting sector appears generally satisfied with the skills of its personnel, particularly among public, religious and community radio stations.

To assess the suitability of human resource qualifications among media operations, different kind of skills were considered. On the one hand, skills related to organisational and administrative capacity were investigated throughout all media operations and projects. On the other hand, skills related to media production in particular were also examined, in some cases in all media organisations, in others only in those in operation.

Starting with the skills we considered of an organisational and administrative nature, according to editors and managers interviewed for this study, their staff members are generally qualified in most skill areas surveyed.

There are however several media operations who have staff members of different levels of qualification in each area surveyed. For example, in the Use of computers, the summed totals (127) exceeding the number of media organisations (111) indicate that some respondents have staff in more than one category of qualification.

There are also some media operations that have not responded to the question in the case of some areas surveyed, probably indicating that they have no such skills in house. This would be the case in Equipment maintenance, where the sum of all category totals is only 51, although 111 media organisations were surveyed.

- The areas where insufficiently qualified and unqualified staffs exceed those qualified are, according to interviewees, Staff management and Marketing and advertising.
- Other areas where qualified staffs are in majority, but only slightly, would include Equipment maintenance, Circulation, and Service providing.

**Table 41**  
**Media operation's qualification of their staff skills**

	QUALIFIED			INSUFICIENT QUAL			UNQUALIFIED		
	TOT	M	F	TOT	M	F	TOT	M	F
Equipment maint.	28	24	4	14	9	5	9	6	3
Use of equipm.	77	48	29	32	18	14	9	7	2
Use of computer	74	43	31	35	21	14	18	10	8
Circulation	44	28	16	23	16	7	13	8	5
Sales administr.	36	23	13	15	9	6	9	4	5
Stock control	34	23	11	12	7	5	7	6	1
Staff management	42	29	13	8	6	2	35	2	33
Production admin.	24	14	10	8	5	3	5	2	3
Transport admin.	34	26	8	5	4	1	7	4	3
Financial control	58	37	21	17	8	9	12	7	5
Accounting	57	34	23	14	6	8	12	7	5
Finances	48	30	18	12	7	5	8	5	3
Marketing & adver	36	24	12	28	17	11	12	7	5
Archives	48	32	16	15	8	7	13	9	4
Service providing	24	16	8	14	9	5	4	3	1
Support staff	53	29	24	22	13	9	10	5	5

When considering skills related to media production in particular, a first set of questions were asked to all media organisations regarding the problems they encounter specifically in journalism and documentary production. Problems that are specifically related to print media or broadcast media were later examined.

When identifying areas in which they encounter skill problems, respondents did not always provide an answer despite the fact that most areas should in principle be applicable to any media organisation.

Besides the fields listed in the table below, respondents also had the opportunity to describe any other skill problem they may encounter in journalism and documentary production. Please refer to the interview questionnaires for this information, which includes 'poaching' problems between media operations...

- Interestingly, in all areas surveyed, there are always fewer respondents regarding women's skills than men's skills. This would suggest that in any case there are always some media operations for which the question was not applicable for women – probably because they have no women involved in those fields.
- A majority of media organisations indicate having problems in three areas: in Documentary research, Specialised journalism, and Investigative reporting. Electoral reporting is another area where almost half of the respondents declared experiencing problems.
- The areas where most respondents declared having no skill problems are Field interviews and Field reporting. These are also the areas where women appear particularly qualified, contrary to Investigative reporting.

**Table 42**

**Media with skill problems in journalism and documentary production (all)**

	With problems			Without problems		
	TOT	M	F	TOT	M	F
Documentary research	30	18	12	17	12	5
Specialised journalism	42	27	15	31	16	15
Field reporting	36	20	16	65	39	26
Investigative reporting	53	32	21	37	21	16
Field interviews	33	19	14	70	41	29
Electoral reporting	33	21	12	38	22	16
Editing	36	22	14	64	37	27

Looking now at the specific problems that may be encountered by print media operations (see next table), it can again be observed that less media operations provided an answer regarding the skill problems of their female staff than male staff.

- The two fields in which a majority of print media have expressed skills problems are in their advertising departments, in photolithography (repro), typography and in DTP design and layout. As there are less than the above count of media operations disposing of their own typo and repro facility, these answers suggest a reference to external services they are using.
- Other fields presenting a substantial number of media operations with difficulties are photography, proofing, subscriptions department and printing services – in this

last case, again a case where several respondents are probably referring to external facilities.

- The only strong field common to a reasonable majority print media would be sub-editing.

**Table 43**  
**Specific problems in the printed press (operational)**

	With problems			Without problems			Other Problems
	TOT	M	F	TOT	M	F	
Sub-editing	15	9	6	41	26	15	-
Tipography	14	8	6	10	7	3	-
DTP design & layout	33	21	12	32	22	10	-
Proofing	26	16	10	33	22	11	-
Photography	19	12	7	22	15	7	-
Photolithography	14	9	5	2	1	1	-
Printing services	12	8	4	23	16	7	-
Advertising department	30	20	10	17	8	9	-
Subscriptions depart.	16	11	5	31	18	13	-
Other skills/abilities <sup>1</sup>	-	-	-	-	-	-	20

1. Please refer to the interview questionnaires for details.

Finally, looking at skill problems specific to the broadcasting sector, it can be found that the sector presents a different skill's profile than that of the print sector.

**Table 44**  
**Specific skill problems in broadcasting operations**

	With problems			Without problems		
	TOT	M	F	TOT	M	F
Elocution	20	11	9	40	20	20
Presentation/animation	10	5	5	39	19	20
Studio operation	10	5	5	43	24	19
Studio interview	15	8	7	37	21	16
Camera operation	4	2	2	14	10	4
Sound operation	16	8	8	32	20	12
Production	19	9	10	30	17	13
Jingles and adverts	14	7	7	29	17	12
Pre-recording and editing	13	6	7	35	21	14
Quality control	10	5	5	35	20	15
Other radio & TV skills	-	-	-	-	-	-

- This time, the number of responses related to skills of female staff are much more numerous – probably a reflection of the greater number of women employed in broadcasting.
- Contrary to the print media sector, the broadcasting sector presents an overall picture of satisfaction towards their staff skills. There is not a single field in which a majority of broadcast media operations are experiencing problems.

- The areas where a larger group of broadcasters (30%+) have expressed difficulties, although still a minority, are in Elocution (33%), Sound operation (33%), Production (39%), and Jingles and adverts (33%).

A further analysis of the data collected should be carried out to determine the variations of these results per type of broadcaster. It is expected that the public broadcasters, in operation for a long time, would score even higher than here and that the new religious and community radio stations would present a greater number of problem areas.

## Media training strategies

Having reviewed the nature of skill strengths and weaknesses among the sector, the concern remains about the media operations' ability to mobilise the human resources they require. In this perspective, one of the strategies that several organisations have developed is to encourage, facilitate or even provide training for its personnel.

The editors and managers interviewed for this study were asked if their media operations have a training policy or do provide any form of training to their personnel. This question was made to them in general terms and again specifically with regards to their female personnel. Their answers are shown on the above and following tables.

**Table 45**  
**Existing training policies or actions in media operations**

	General				For women			
	TOT	Y	N	NA	TOT	Y	N	NA
<b>Print media</b>								
Daily newspaper	4	3	1	-	4	1	3	-
Weekly newspaper	11	3	7	1	11	2	7	2
Other newspaper	11	5	5	1	11	1	7	3
Newsletter	10	3	6	1	10	3	6	1
Magazine	7	2	5	-	7	1	5	1
Email media	2	2	-	-	2	1	1	-
Daily fax	5	-	3	2	5	-	3	2
Other fax	2	1	1	-	2	1	1	-
<b>Broadcast media</b>								
Public radio	10	4	3	3	10	4	3	3
Commercial radio	2	1	1	-	2	-	2	-
Religious radio	8	5	1	2	8	2	4	2
Community radio	4	2	2	-	4	1	3	-
Political party radio	1	-	1	-	1	-	1	-
Public TV	5	5	-	-	5	-	4	1
Commercial TV	1	-	1	-	1	-	1	-
Religious TV	1	1	-	-	1	-	1	-
Video Advertising	1	-	1	-	1	-	1	-
Documentary video	1	-	1	-	1	-	1	-
Various video prod.	5	5	-	-	5	1	3	1
<b>Multimedia</b>	1	1	-	-	1	1	-	-
<b>TOTAL</b>	<b>92</b>	<b>43</b>	<b>39</b>	<b>10</b>	<b>92</b>	<b>19</b>	<b>57</b>	<b>16</b>



- It appears that nearly half of all media operations (47%) have a preoccupation for training of their personnel, expressed either through a training policy or training activities they offer.
- As much as 20% of media operations declared having a training policy or offering training specifically to their female personnel, an encouraging proportion given the relatively low rate of skill problems they declared having with their female staff.

**Table 46**

**Existing training policies or actions per province (operational)**

	C_D	Gaz	Inha	M_C	Mnc	Map	Nam	Nias	Sofl	Tete	Zam
Total media oper.	1	3	6	46	2	5	5	4	9	4	7
General Training	-	2	1	23	2	3	4	1	4	-	3
Women's Training	-	2	1	8	1	2	3	-	1	1	-

- It is unknown whether the training initiated by media operations is directed specifically at the field where they declared their personnel insufficiently qualified or unqualified.
- Media training, however, cannot depend only on media operations. The need for training shown in this chapter (through figures on insufficiently qualified or unqualified staff) also requires the attention of the media training institutions in the country. In this regard, the future study envisaged by the UNESCO/UNDP Media Development Project on the matter of media training nationally should further investigate the needs expressed in this study and the training preoccupations and efforts deployed by employers within media operations.

## Management and Financial profiles of media operations

There were few ways by which the managerial capacity of media operations could be assessed through the methodology employed for this study. The interviews were conducted with the editors or directors, prime responsible for management, and none of them would tell a stranger that they are managing poorly if it were the case – obviously.

However, they were asked to say whether the overall capacity of their organisation was satisfactory, at two different times in the interview, and their responses varied. They were also asked to say whether their organisation was professional, in process of professionalisation, or community operated. They were finally asked to qualify a series of organisational capacity indicators that have much to do with managerial capacity.

### Professionalism

Starting with the self-description of media operations as professional, in process of being so or community operated, we can observe that the majority of media operations outside of Maputo City are not describing themselves as professional.

Once disregarded those in Maputo City, those describing themselves as in process of professionalisation are in equal numbers to those saying they are community operated, and both outnumber the 'professional' ones.

**Table 47**  
**Qualification of professionalism (operational)**

	Total	N/answer	Community	In process	Professional
C Delgado	1	-	1	-	-
Gaza	3	-	1	1	1
Inhambane	6	1	-	3	2
Maputo City	46	3	3	8	32
Manica	2	-	-	-	2
Maputo Prov	5	-	1	2	2
Nampula	5	-	2	-	3
Niassa	4	-	-	2	2
Sofala	9	-	2	3	4
Tete	4	-	2	-	2
Zambezia	7	1	3	1	2
<b>Total</b>	<b>92</b>	<b>5</b>	<b>15</b>	<b>20</b>	<b>52</b>

On a table not shown here (see Annexe J), there are six media sectors where most operations describe themselves as professionals. They include the daily newspapers (all four of them), weekly newspapers (8 out of 11), daily fax newspapers (all five of them), public radio stations (all ten of them), public television channels (all five) and producers of various kinds of video (4 out of 5).

The newspapers other than dailies and weeklies are among those with the highest proportion of media operations still in process of professionalisation. They are 6 out of 11 and are based in Gaza, Inhambane, Maputo City, Maputo province, Niassa and Zambezia.

These twenty media operations in process of professionalisation are mostly new organisations, created since 1994. Only one dates from 1988, a newspaper other than daily or weekly, a case of longer professional process. Four others have not provided data of their year of creation nor registration.

It is also interesting to note that there are 15 media operations describing themselves as community media.

The community media represent an important part of the media operations in some provinces. In Zambezia for example, 3 out of 7 media operations define themselves as community media, in Tete there are 2 out of 4 and in Nampula 2 out of 5.

Seven of these are community and religious radio stations and eight are printed publications, namely newsletters, magazines and newspapers of other periodicity than dailies and weeklies.

■ The community media operations represent 16% of all operational media in Mozambique (excluding the media that did not answer the question) and the analysis of their professionalism and organisational capacity should be sensitive to this dimension, which makes them different from media operated by journalists and media professionals.

## Organisational capacity perception

When asked if they consider their organisational capacity satisfactory, only 60% of media operations answer positively and 20% do not answer at all.

This level of satisfaction is the same in Maputo City, or nearly, with 61% stating their satisfaction. Although 58 media operations based in the capital city said that they considered themselves professional operations, only 28 actually expressed satisfaction toward their organisational capacity.

In the other provinces, the highest level of satisfaction among respondents is situated in Beira, and the lower is in Zambezia. This result in Zambezia coincides with a high proportion of community media operations in the province.

**Table 48**

**Perception of organisational capacity per province (oper.)**

	Total	Satisfactory	Not satisf.	N/Answer
C Delgado	1	-	1	-
Gaza	3	2	1	-
Inhambane	6	4	2	-
Maputo City	46	28	7	11
Manica	2	2	-	-
Maputo Prov	5	3	-	2
Nampula	5	4	1	-
Niassa	4	1	1	2
Sofala	9	6	1	2
Tete	4	3	1	-
Zambezia	7	2	4	1
<b>Total</b>	<b>92</b>	<b>55</b>	<b>19</b>	<b>18</b>

Adding up those who did not answer to those who answered negatively to the question, there are several media sectors where the level of satisfaction is not sounding very positive (please refer to the following table).

- All print media categories but the daily newspapers, and the email, Internet and fax media have moderate to low proportions of satisfactory organisational capacity.
- In the broadcasting sector, the majority expresses rather high levels of satisfaction. Only among producers of various videos most do not express satisfaction toward their organisational capacity.

**Table 49**  
**Perception of organisational capacity per sector (oper.)**

	TOTAL	Satisfactory	Not satisf.	N/answer
<b>Print Media</b>				
Daily newspaper	4	3	-	1
Weekly newspaper	11	7	3	1
Other newspaper	11	4	7	-
Newsletter	10	6	3	1
Magazine	7	4	1	2
Email media	2	-	-	2
Daily fax	5	4	-	1
Other fax	2	2	-	-
<b>Broadcast media</b>				
Public radio	10	7	1	2
Commercial radio	2	1	-	1
Religious radio	8	6	1	1
Community radio	4	3	1	-
Political party radio	1	1	-	-
Public TV	5	4	-	1
Commercial TV	1	-	-	1
Religious TV	1	1	-	-
Video Advertising	1	-	-	1
Documentary video	1	-	-	1
Various video prod.	5	1	2	2
<b>Multimedia</b>	1	1	-	-
<b>TOTAL</b>	<b>92</b>	<b>55</b>	<b>19</b>	<b>18</b>

This question was followed by several questions on specific capacity indicators, concluded by a question asking to qualify the *general capacity* of the organisation as good, regular or bad.

Interestingly, a much higher proportion of respondents did answer to the question formulated in those terms. It may be that having gone through a list of capacity factors they had to qualify, they then had a better idea of their situation. Or perhaps, a yes/no question is a little more difficult to answer for most people.

In any case, only two media operations are now clearly demonstrating dissatisfaction towards their capacity, against 18 earlier, and 11 did not answer this time, while 19 did not the first time. The two dissatisfied are magazines based in Maputo City.

Of those 55 who first answered that they were satisfied with their organisational capacity, several used the opportunity to introduce nuances to their opinion in the second question as only a third of all operations are qualifying their general capacity as good and not quite half as regular.

**Table 50**  
**Qualification of general capacity (operational)**

	Total	Good	Regular	Bad	N/answer
<b>Print media</b>					
Daily newspaper	4	1	3	-	-
Weekly newspaper	11	3	8	-	-
Other newspaper	11	3	7	-	1
Newsletter	10	2	5	-	3
Magazine	7	2	2	2	1
Email media	2	2	-	-	-
Daily fax	5	2	3	-	-
Other fax	2	1	1	-	-
<b>Broadcast media</b>					
Public radio	10	2	4	-	4
Commercial radio	1	1	-	-	-
Religious radio	8	4	3	-	1
Community radio	5	2	3	-	-
Political party radio	1	-	1	-	-
Public TV	5	1	3	-	1
Commercial TV	1	-	1	-	-
Religious TV	1	1	-	-	-
Video Advertising	1	1	-	-	-
Documentary video	1	-	1	-	-
Various video prod.	5	1	4	-	-
<b>Multimedia</b>	1	1	-	-	-
<b>TOTAL</b>	<b>92</b>	<b>30</b>	<b>49</b>	<b>2</b>	<b>11</b>

The capacity indicators are probably the most interesting in this analysis, in order to see where are the capacity strengths and weaknesses of media operations. A series of indicators was proposed to respondents who were invited to qualify them as good, regular, or bad.

Surprisingly, the following table shows that the only area where a majority of media operations consider themselves doing well has to do with their public image. The second strongest ability in the sector would be in decision-making process, at which 52% of all media operations consider themselves good, followed by crisis management abilities (50%).

Few media operations qualified any of the indicators as bad. The greatest areas of discontent, but still among a minority, are mainly of an infrastructure nature: office transport, office space, and functional equipment – with only one related to human resources: social benefits.

A majority of media operations consider most of the capacity indicators as 'regular' or 'good' within their organisation, except in the area of labour relations where a majority of respondents did not answer the question that was formulated in terms of union/management relationships. It is likely that the national journalist union (SNJ) is not present in a number of media operations.

**Table 51**  
**Qualification of capacity indicators (operational)**

	Good	Expressed in percentage		N/answer
		Regular	Bad	
Staff abilities	38	57	1	4
Staff number	28	58	7	8
Management team	29	46	8	17
Job descriptions	40	39	7	14
Working conditions	22	70	-	9
Social benefits	14	35	27	24
Labour relations	21	22	2	55
Decision-making process	52	32	3	13
Planning abilities	39	42	2	16
Fin. & resp. accountability	40	40	4	15
Growth management	40	39	9	14
Crisis management	50	36	4	10
Office space	27	34	30	9
Functional equipment	29	34	27	10
Office transport	21	21	42	16
Public image	65	21	2	12
General capacity	33	53	2	12
<b>Average excl. Gen. cap.</b>	<b>35</b>	<b>39</b>	<b>11</b>	<b>15</b>

■ If these answers were given in all honesty, they seem to indicate that little support for capacity building is required in the sector, beside the above-mentioned infrastructure shortfalls in the means of transport (in provinces specially), office space and various equipment.

■ If they were less than honest, there are limited clues telling something about areas in which support and capacity building should be directed – besides, perhaps, some areas where more than 10% of respondents did not answer.

## Financial capacity

While one of the capacity indicators measured earlier was abilities in financial and duty-related accountability (*Habilidades de prestar contas no cumprimento de tarefas ou contas financeiras*), the financial capacity indicators were further examined separately from other capacity indicators.

This first element to be observed from the following table is the high level of respondents who did not answer these questions. It is likely that those who did not answer to the questions related to income meant that they do not have any such income. They might not believe that this is 'bad'. For instance, it is common that most broadcasters do not have sales income other than advertising airtime income. Most newsletters are also distributed for free rather than sold. There is nothing 'bad' about this. However, when newspapers or magazines have no sales income, a 'non applicable' answer is more debatable.

Given the sensitivity of the financial management issues, and the improbability that any of these questions did not apply to some respondents, it can safely be presumed that those who did not answer deliberately avoided providing this information. In which case we can safely presume that their situation is not wholly positive.

**Table 52****Qualification of financial capacity indicators (operational)**

	Expressed in percentage			
	Good	Regular	Bad	N/answer
<b>Income generation</b>				
Sales income	7	30	15	46
Advertising income	7	28	21	42
Services income	4	16	20	59
Other income	1	9	2	87
<b>Financial management</b>				
Financial planning	29	26	4	36
Financial accounting	34	29	5	26
Financial control	37	24	8	26
Financial decision-making	41	23	7	24

On tables not shown here (see Annexe J), the detailed information collected provides indications of the sectors doing well, ordinarily, or badly with each kind of income generation and each kind of financial management skill. Although some sectors seem weaker than others in some respect, all sectors count weak media operations in some or other respect.

■ One of the most striking result shown above is the considerably more positive assessment of media operations' own performance with regards to financial management than to income generation.

■ Many more media operations answered clearly to another question regarding their financial situation's satisfaction or dissatisfaction. More also then gave a negative answer than to any of the above financial capacity indicators. According to a table not shown here (see Annexe J), there were only 14% of all media operations declaring their satisfaction towards their current financial condition. There were 66% saying they were not satisfied and 20% that did not answer. No province or media sector revealed results significantly different.

The difficulties encountered by most media operations in generating any kind of income are confirmed by the data they provided on the percentage of income they receive, by source of income.

The most common sources of income for media operations are, in decreasing order: Advertising income (in at least 41 media), Sales income (in at least 33 media), Donors income (in at least 29 media), Service providing income (in at least 19 media) and Government subsidy income (in at least 9 media). Some media operations have not provided information.

At least 19 media operations are operating from a single source of income, or one that represents more than 90% of their income. Such high dependency on a single source of income may be donors funding (in at least 8 media operations), advertising revenues (in at least 6 operations), provincial or central government subsidy (in at least at least 3 operations), or sales (in at least one media).

Donors' funding and sales income are the main sources of income providing the better part of media' budgets (+50%). Other important sources of income are, in decreasing order: advertising income (in at least 10 organisations), provincial and central

government subsidy (in at least 7 media operations), and service providing income (in at least 3 media operations).

Most media operations have a diverse structure of financing. However, there are a few problematic areas in the income structure of most media operations, that could explain why so many of them declared their dissatisfaction towards their financial situation:

- Although there are media operations whose general public or community service mission make self-sufficiency impossible, their management should be careful not to be too vulnerable to external changes in funding priorities. The sustainability potential of some newspapers, magazines and broadcasters is threatened by the fact that they are entirely funded by donors or government. It would be responsible on the part of donors and government to also provide in-kind assistance in developing marketing skills, business plans, and income-generating strategies and tools, to rapidly reduce this level of unhealthy dependency.
- Sales income should, in principle, be the main source of income of most publications unless located in a highly favourable advertising environment. It is therefore surprising to find that only 31 of the 51 print media derive more than 50% of their income from sales – especially considering that only 4 derive most of their income from advertising revenues. Print media managers should pay special attention to their marketing and circulation strategy, staff and administration. It is unlikely that a provincial newspaper's sales ceiling should not move further up than 500 or even 2500 copies, even if it is a new initiative.
- Advertising income is a little more common practice than expected, as it brings income in half of the surveyed media operations. Although many of these generate less than 30% of their income from advertising, it is an indication that the market is developing, hopefully not only in the capital city. Experience has proven that any small community announcement can bring something to an operation and, again, managers and donors should work together to assist small and new operations to develop their marketing skills and production services to eventual advertising clients.
- Income generating services also appear limited, given the resources and facilities at the disposal of media operations. Information shared by interviewees and presented in tables shown in Annexe J indicate that in several instances, more income generating services could be offered by media operations. In some provinces, there are photocopiers, print equipment, studios, photo and film archives, and even fax facilities, that are only used in-house when they could also be hired to the public against fees. It should however be noted that some provinces, such as Cabo Delgado and Tete seem particularly deprived of such resources and facilities.

## **Financial administration skills**

The options available to diversify and increase media's income are easier said than done. Many a manager has been thinking about these issues before and is inevitably confronted to one major obstacle: How to implement such changes? Or rather, Who is going to do this? Because managers can't be editors, circulation managers, public relation officers, marketing and advertising experts, all at once. The human resource is therefore often the key challenge in any strategy towards better financial health.

Editors and managers were asked, during this survey, to identify areas of skills in financially related activities in which their operation is qualified, insufficiently qualified, or not qualified.

The information presented here is for all media operations and projects. Tables in Annexe J offer detail per media sector.



**Table 53**  
**Skills in financially related areas (all)**

	Expressed in percentage		
	Qualified	Insuffic. qualified	Unqualified
Circulation	56	28	16
Sales administration	59	26	15
Stock control	64	23	13
Financial control	68	19	13
Accounting	69	17	14
Finances	72	17	11
Marketing	47	36	17
Service providing	59	32	9
<b>Total</b>	<b>62</b>	<b>24</b>	<b>14</b>

- It appears that marketing, circulation, service providing and sales administration are the areas where media operations encounter most shortage of qualifications, a diagnosis that mirrors the lack of income from advertising and sales observed earlier among them.
- Shortage of skills in marketing contributes importantly to explain not only the lack of advertising and sales income, but also the difficulty encountered by several respondents in providing figures on their audience, or market.
- The fact that as many as 14% of all media organisations openly declared their staff unqualified in accounting is unexpected and of concern.

### **Technical & Equipment assets and needs in media operations**

Media editors and managers were requested to qualify the functioning state of their equipment assets as either good, regular or bad. This was requested from them for all office equipment and specialised equipment – for print, radio or video & television purposes.

Email and satellite connections were also covered by the survey, although several respondents having an email connection did not answer the question referring to modems – possibly a too technical term.

#### **Office equipment**

Across all sectors, only some media operations provided information on the state of their office equipment assets. The number of respondents who did not provide information is considerable.

- Nearly all respondents who qualified the state of their office equipment are based in Maputo City and mainly in the print sector. This could indicate a lack of such basic equipment in other provinces and in the broadcasting sector.

**Table 54**  
**State of office equipment per media operation**

	Good	Regular	Bad	N/answer
Admin. & accounts computers	18	15	4	55
Newsroom computers	16	7	3	66
Production computers	9	7	3	73
Archive computers	7	1	1	83
All purposes computers	17	6	3	66
Computer printers	26	14	4	48
Telephone lines	31	10	7	44

■ As can be noted, at least 26 media operations are working with 'all purposes' computers, serving to all activities and departments within their organisation. This is definitely the case for at least 17 media operations based in Maputo City and 9 in other provinces.

### Print media equipment

Looking at equipment specific to the print media, only photo cameras, photo labs, repro facilities and printing presses have been considered. Contrary to the previous question concerning office equipment, all print media respondents have answered this question.

On a detailed table not shown below (please refer to Annexe J), Maputo City appears to concentrate most of the equipment assets in the sector, leaving a great number of print media operations far behind, with very little resource even in photography.

At national level, it should be noted that only 42% of the 50 publications surveyed possess a photo camera. The photographic equipment is mostly found in magazines and newspapers, but several weekly newspapers and other newspapers do not have such equipment – especially out of Maputo City. Among the 21 publications that possess this equipment, only 3 have their own photo lab.

**Table 55**  
**Media operations possessing print media equipment**

	Med Oper TOT	Photography Cameras		Photography Laboratory		Photo- Lithography		Printing Press	
		Yes	No	Yes	No	Yes	No	Yes	No
Daily newspaper	4	3	1	1	3	1	3	1	3
Weekly newspaper	11	5	6	-	11	-	11	2	9
Other newspaper	11	7	4	-	11	-	11	1	10
Newsletter	10	1	9	-	10	-	10	1	9
Magazine	7	5	2	2	5	1	6	3	4
Daily fax	5	-	5	-	5	-	5	-	5
Other fax	2	-	2	-	2	-	2	-	2

Only two print media declared having their own repro facility (photo-lithography), a daily and a magazine, although two daily newspapers are known to own such facilities: *Notícias* and *Diário de Moçambique*. It is interesting to note that 8 print media operations declare having a printing facility. These are not necessarily all different facilities, as some publications are sharing ownership and print facilities – this is the case of Xiphefu publications in Inhambane, for instance.

All are not big printing presses obviously, as most such respondents are based in provinces other than Maputo City. They include some copy printers for example.

**Table 56**

**Repro facilities and printing presses' condition**

	Repro facilities			Printing presses		
	Good	Regular	Bad	Good	Regular	Bad
C Delgado	-	-	-	-	-	-
Gaza	-	-	-	1	-	-
Inhambane	-	-	-	-	3	-
Maputo City	-	1	-	-	1	-
Manica	-	-	-	1	-	-
Maputo Province	-	-	-	-	-	-
Nampula	-	-	-	-	1	-
Niassa	-	-	-	-	-	-
Sofala	-	1	-	-	1	-
Tete	-	-	-	-	-	-
Zambezia	-	-	-	-	-	-
<b>TOTAL</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>2</b>	<b>6</b>	<b>0</b>

There are some 60 printing facilities in the country, according to the national print workers union. For the purpose of this study, eight were visited in order to assess the need for and possibility of creating a new newspaper's printing press.

The newspaper printing presses that were visited are Gráfica de Notícias, Cegraf and Diário de Moçambique. Some other printed presses doing commercial work and currently unable to print newspapers were also visited. These include Minerva Central, Imprensa Nacional, Clássica Comercial Industrial, Central Impressora (Ministry of Health) and the UEM print facility.

A print expert attached to this study's team, Mr. Tony Rodriguês, has gathered information specifically on six of these printing presses, as they are involved in printing newspapers or could potentially be interested to do so.

Those owned by the Health Department and University Eduardo Mondlane were visited later by the senior researcher and research assistant.

■ His main conclusion is that the newspapers' printing presses he visited are leaving much to desire in terms of maintenance mainly but also output quality. He believes that several printed presses are under-productive and poorly operated, mainly inherited from a long period of low technical and managerial skills level. One of his observations also touches on the inadequacy of the repro facilities (too old) and printing equipment (too big) used by most newspapers' printers. His report can be found in Annex H and is further discussed in Chapter 7.

## Radio broadcasting equipment

The radio broadcasting sector is the only one showing the presence of equipment assets in several provinces other than Maputo, although radio stations in the capital city are again better equipped than their counterparts elsewhere in the country.

**Table 56**  
**Media operations possessing radio broadcasting equipment**

	Oper. TOT	Recording equipment		Recording studio		Broadcasting Studio		Radio Transmitter	
		Yes	No	Yes	No	Yes	No	Yes	No
Public radio	10	5	5	6	4	6	4	7	3
Commercial radio	2	1	1	1	1	1	1	-	2
Religious radio	8	8	-	4	4	6	2	6	2
Community radio	4	4	-	1	3	4	-	4	-
Political party radio	1	1	-	1	-	1	-	1	-
<b>TOTAL</b>	<b>25</b>	<b>19</b>	<b>6</b>	<b>13</b>	<b>12</b>	<b>18</b>	<b>7</b>	<b>18</b>	<b>7</b>

The technical assessment of radio stations that was required by UNESCO/UNDP Media Development Project is enclosed in Annexe G and provides much more details than the information gathered by the field researchers from the station managers. The annexed report includes an overall assessment of the sector and separate assessments for each radio station. Eng. Nazário Muchanga is the radio engineer who conducted the technical assessment.

- One of the main conclusions reached by him is that the bigger part of the private radio stations suffers from a lack of field recording equipment and means of transport. A poor technical and professional knowledge of radio broadcasting was observed in several community and radio stations, leading to maintenance and repair problems, or inadequate installation of the equipment. Several of these stations also have a poor acoustic in their studio, inadequate working space and/or transmitter problems.
- He also pointed that the main deficiency among the *Rádio Moçambique* stations is located in the Sofala provincial station. The equipment of this station, second in importance in the RM network, apparently suffers from a high degree of deterioration. Most parts of this equipment are in use for more than 45 years and are unreliable and often out-of-order. The situation is aggravated by the lack of spare parts (some of which in discontinuation) and resources to import them.

## Video and television broadcasting equipment

Television and video production houses were asked to indicate the kind of equipment they possess and to qualify the state of this equipment.

Several television broadcasters and video production houses did not qualify the state of their equipment, which makes difficult the analysis of data available.

**Table 57**  
**Media operations possessing video & TV broadcasting equipment**

	Oper. TOT	Field equip.		Studio equip.		Record. stud.		Edit suite		TV transmit.		TV antenna	
		Y	N	Y	N	Y	N	Y	N	Y	N	Y	N
Public TV	5	2	3	2	3	3	2	4	1	4	1	3	2
Commercial TV	1	-	1	-	1	-	1	-	1	-	1	0	1
Religious TV	1	-	1	1	-	1	-	1	-	1	-	1	-
Video Advertis.	1	-	1	-	1	-	1	-	1	-	1	-	1
Documentary	1	-	1	-	1	-	1	-	1	-	1	-	1
Various Video	5	2	3	1	4	1	4	2	3	-	5	-	5
<b>TOTAL</b>	<b>14</b>	<b>4</b>	<b>10</b>	<b>4</b>	<b>10</b>	<b>5</b>	<b>9</b>	<b>7</b>	<b>7</b>	<b>5</b>	<b>9</b>	<b>4</b>	<b>10</b>

The data presented in the tables above and below only provide information on which video and TV sectors possess some of the equipment surveyed.

**Table 58**  
**Media operations possessing video & TV cameras**

	Oper. TOT	Beta 34cm		Beta SPCM		BetaCam		Super 8		35mm cam	
		Y	N	Y	N	Y	N	Y	N	Y	N
Public TV	5	-	5	1	4	-	5	2	3	1	4
Commercial TV	1	-	1	-	1	-	1	-	1	-	1
Religious TV	1	1	-	1	-	1	-	-	1	-	1
Video Advertis.	1	-	1	-	1	-	1	-	1	-	1
Documentary	1	-	1	-	1	-	1	-	1	-	1
Various Video	5	-	5	2	3	-	5	2	3	-	5
<b>TOTAL</b>	<b>14</b>	<b>1</b>	<b>13</b>	<b>4</b>	<b>10</b>	<b>1</b>	<b>13</b>	<b>4</b>	<b>10</b>	<b>1</b>	<b>13</b>

There seems to be only 5 Betacam video cameras in the country (including SPCM and standard), a number that appears very low as there are 7 television broadcasters interviewed, not counting as many video production houses.

For more information on the video and television broadcasting equipment distribution per province, please refer to the corresponding table in Annexe J.

### Email and Internet access

Likewise, only 22 media operations qualified the state of their modem, or email and Internet equipment, although 35 have provided email addresses.

About two-third of those who did provide information on the state of their modem said that it was good. Another third finds it 'regular' or is experiencing problems.

The majority of media operations do not have access to Internet or email services. As many as 26 out of 35 having an email address are based in Maputo. Only some have a Web site address.

- Most media operations that have email access are found in the print media sector. However, most daily and weekly newspaper, and half of other newspapers, do not have such access.
- The access to new information technology is therefore limited, considering the number of computers and telephone lines present in media operations. This impacts on both the access to sources of information and the organisational/professional capacity of media operations.
- The existence of email addresses in 9 media organisations out of Maputo City indicates that access is possible in at least some other provinces (such as Inhambane, Manica and Sofala), which also indicates that access can be enlarged to more media operations.

**Table 59**  
**Email and Internet access (operational)**

	Email address		Internet address	
	Have	Don't have	Have	Don't have
<b>Print media</b>				
Daily newspaper	1	3	1	3
Weekly newspaper	4	7	2	9
Other newspaper	5	5	2	9
Newsletter	5	6	2	8
Magazine	3	4	1	6
Other print media	2	-	1	1
Daily fax	5	-	3	2
Other fax	-	2	-	2
<b>Broadcast media</b>				
Public radio	1	9	-	10
Commercial radio	-	2	-	2
Religious radio	4	4	1	7
Community radio	-	4	-	4
Other radio	-	1	-	1
Public TV	1	4	-	5
Commercial TV	-	1	-	1
Religious TV	-	1	-	1
Video Advertising	1	-	-	1
Documentary video	-	1	-	1
Various video	3	2	-	5
<b>Multimedia</b>	-	1	-	1
<b>TOTAL</b>	<b>35</b>	<b>57</b>	<b>13</b>	<b>79</b>

### Satellite programming content's access

On the grounds of the information available, there would have only been seven broadcasters equipped with a satellite connection. Four would have been radio stations and only three television stations.

However, this is no longer valid since several new TVM stations started operating shortly after the field research was completed.

**Table 60**  
**Access to satellite programming content**

	Maputo C	Nampula	Niassa
Public radio	1	1	-
Religious radio	1	1	-
Public TV	1	-	1
Religious TV	1	-	-
<b>TOTAL</b>	<b>4</b>	<b>2</b>	<b>1</b>

### **The challenge of securing and managing resources**

Because a clear mission and strategic direction are not the only factors for sustainability, several kinds of resources were reviewed in this chapter, including human, financial and material ones.

It has been possible to see which kind of media operations are succeeding in mobilising the minimum resources they need to operate, and what kind of managerial skills do they have at their disposal to secure and manage these resources. These are definite signs of these media operations' sustainability potential.

Other media operations have expressed difficulties in mobilising the right amount or kind of human resource they need, or in generating a certain diversity of income to ensure their financial independence against possible external changes, or in securing the necessary equipment required for quality and impact. Some may have mobilised most of this but have managerial or administrative skills difficulties to protect and develop their resources.

### **Overall elements emerging**

There are considerable gaps between similar operations in terms of the size of their staff. As a result, some media operations have become experts at making the most out of their human resources but the strain imposed on such personnel constitutes a factor playing against the long-term sustainability of the media operations in question.

The presence of volunteers may compensate for the shortage of permanent employees in community media operations, and therefore minimises the potential strain. The challenge in these cases is to sustain the participation of volunteers, in order to sustain the benefits of their participation that bring capacity but also increased creativity and broader community representation. Community media represents 16% of all media operations and volunteers represent 23% of all operational media personnel.

The experience of women is generally under-utilised in media operations, although less so in community and religious radio stations than elsewhere – and especially when volunteering. Media operations would be having a different and broader impact on the audience if they better represented the female population and were practically committed to gender equality, a benefit that would also contribute to reinforce their sustainability potential.

Only 60% of media operations described their operational capacity as satisfactory, half of which qualify it as good. Most media operations unsatisfied with their capacity are found in the print sector or – within the broadcasting sector – in the video production sector. An important part of these are community media.

Respondents identified the main problem areas among organisational capacity factors as transport facilities, office space and equipment. These difficulties were confirmed by the radio broadcasting technical assessment that was carried out for the study.

Financial capacity of most media operations generally scores better at financial management than income generation. Only 14% are satisfied with their financial condition and 21% depend on a single source of income, or one that represents more than 90% of their income. Although media operations can not all derive their income from the same sources, in several cases their sources are not sufficiently diversified – thus making operations vulnerable on the long term.

The difficulty in generating more diversified forms of income could be caused by a deficit of the skills required to do so. Marketing, circulation, service providing and sales administration are the areas where media operations encounter most shortage of qualifications. There are also 34% of media operations declaring that their personnel is insufficiently qualified or unqualified in accounting. Several media operations appear to be administered by people with journalism skills but little administrative skills, a situation that can seriously threaten them. Media operations should be aware that poor financial management makes them vulnerable to financial mismanagement, including funds appropriation.

Equipment constitutes an additional area of challenge for several media operations. Office equipment is very limited outside Maputo City, mostly in the broadcasting sector. Print media operations often do not have photographic cameras and when they do they often do not have photo lab facilities. Among public radio broadcasters, *Rádio Moçambique* seems to have serious equipment problems in its provincial station of Sofala. In the independent sector, several religious and community radio stations would suffer from broadcasting skills and equipment problems. Access to new technologies such as email and Internet and satellite connection is still limited but is developing.

- Despite difficulties and challenges, many media operations indicate potential for sustainability, demonstrating combined abilities to articulate their vision and strategic direction and to mobilise and manage the resources they require to achieve their mission effectively and over time.
- Respondents have shown a remarkable honesty in providing answers to this survey's questions. This is a quality that is not the subject of this study but that constitutes a further organisational strength. Although this report may have given a sad picture of the sector on some levels, the frankness of the appraisal shared by respondents is a clear sign of their ability to identify challenges and of their readiness to tackle them. These are essential conditions for sustainability.
- This study was conducted with the very hope that this would happen, in order to identify measures of support that can be offered to reinforce some of the necessary factors for success within these media operations. To this end, a series of recommendations follows in the next chapter.



## Findings and recommendations

### Assistance needed: The sky's the limit?

The following recommendations are based on the findings of this survey and the areas for which the UNESCO/UNDP Media Development project requested documented advice.

#### Information pluralism

On the basis of information pluralism analysis and assessment, some general recommendations emerge.

#### Media's fields of action

The level of diversity in terms of the media typology in the country is not dissatisfactory. Some problems in the media's fields of action should however be addressed.

At national level, the number of national daily newspapers could be increased for greater diversity, but only if a strong, potentially sustainable and authentically nation-wide project were to emerge. Existing national media's impact on the entire national audience should be reinforced as a priority. Provincial delegations of national media should be tasked not only with content providing but also with reaching the audience (e.g. administration and expansion of circulation) and income generation (e.g. providing services, getting advertising, etc.).

At provincial level, access to public broadcasting (radio and television) should be ensured in each of the provinces. Besides the national broadcasting service and its eventual provincial production, it would be desirable to ensure the existence of at least one private provincial radio broadcaster in each of the provinces to ensure diversity of information through radio, the most accessible media at the moment. A local church, community or business could own this private radio. Likewise, at least one provincial publication, weekly preferably to monthly, would be desirable to ensure regular access to information on the province itself.

At local level, local media are bound to become increasingly important to contribute to democracy, transparency and good governance in the newly created local authorities. National or provincial media operations currently stronger on the local scene than that of their original target should revisit their focus and consider undertaking to transform themselves into a strong and successful local media. Local media should not be forced to undertake a larger focus than that they can or wish to, and community radio should not be restricted to a single locality unless based in densely populated area.

## **Media pluralism impact**

Given the low impact of many media operations, assistance in this regard should be prioritised. Given the high cost involved in circulation of print media and video productions, a recommendation follows below encouraging the creation of a joint national distributor. Please refer to Assistance to joint initiatives, under Assistance mechanisms further below.

## **Media ownership structure**

Again there is a generally good diversity in the media's forms of ownership. A lot of confusion however appear to exist around this issue and some media have signified their dissatisfaction regarding their legal status.

It would be helpful for all current operations and new projects that a brochure be produced on the matter by the Gabinete de Informação and Ministério da Justiça, perhaps in collaboration with the UNESCO/UNDP Media Development Project.

The brochure could provide information on the procedures, options and implications of the various forms of registration of print and broadcast media. Distinctions between public and private, and commercial and non-profit types of registration should be included, with their respective legal, tax, import duties and authorisation implications and procedures.

## **Language used by media**

The results of this study show that most media operations are using Portuguese as their sole language of publication or broadcasting. Several new projects are planning to use more national languages together with the Portuguese language.

Our audience's mini-survey seems to confirm that Portuguese is the language of their first choice. However, this should be confirmed by other national survey.

In any case, all new initiatives should be encouraged to decide on their language(s) of publication or broadcasting following market research results or proper consultation of their target audience.

## **Legal environment**

Considering the difficulties encountered by several broadcasters in defining themselves, it appears necessary that a broadcasting law and regulation procedure be developed and adopted shortly before the sector grows further.

The broadcasting sector should be clearly divided between public, commercial and community sub-sectors. Licensing and frequency allocation should follow clear, strict and publicised criteria per such sub-sector, covering AM and FM frequencies as well as open channel, cable and satellite television. Constitutive documents should be required from applicants and correspond to the sub-sector definition for which permit they apply.

The impact of digital audio and video signals on existing broadcasters should be studied and legal and regulatory frameworks should be designed to protect and enlarge the audience of national broadcasters currently using analogue signals against digital satellite signals of foreign broadcasters.

Likewise, regulations should make it difficult for foreign broadcasters to register nationally and access radio frequencies and open TV channels unless they broadcast

a high percentage of local contents. The case of RTP is different, as this foreign public broadcaster is co-operating with the public national broadcasters in several ways. This co-operation should be on-going to warrant an on-going open TV channel.

All broadcasting sectors should be allowed to generate income from their activities but only the commercial sector should be taxed on profits. The public and community sub-sectors should be obliged to register as non-profit entities, allocate to their own activity all their income (and thereby becoming more self-sustainable), and be exempted from taxation and import duties.

The same exemptions should apply to print media operations registered as non-profit entities considering their philanthropic contribution to economic development, job creation and the public's information rights.

The import duties on all media inputs, including paper, chemicals and ink, as well as print, broadcasting and computer equipment and spare parts, should be reviewed and drastically reduced. This should be considered of paramount importance for two reasons. Firstly, to ensure the economic sustainability of the industry made up of 92 media enterprises, which employ at least 1,450 full-time people and many free-lancers in the country. Secondly, to protect Mozambican citizens' right to a pluralistic and quality information.

The protection of the official and national languages in Mozambique does not appear threatened by the existing media operating only in English on the territory, at the moment. However, legal and regulation provisions should be made to control the possible multiplication of such operations, particularly in the broadcasting sector.

## **Printing press**

Time and financial constraints have impacted on the availability of an independent printing press expert for this part of the study. The following discussion is therefore candid and concluded by a recommendation for further analysis.

The printing press expert visited several existing printing presses over five days and the Senior researcher and Assistant senior researcher completed his assessment with some two additional visits.

The assessment carried out focused on the need for and possibility of assisting the creation of a new national printing press, or several new provincial ones.

Two arguments were put forward to motivate both options. First, it was argued that the prices charged by existing printing presses in Maputo city were too high, for lack of independent competition. Secondly, it was argued that the provincial newspapers would benefit from the existence of small printing presses in the provinces, that could also be used by national papers produced in Maputo city to reduce their transport costs.

### **A new national printing press**

With regards to the first issue of prices and absence of competition, it would appear that there are various reasons for the prices to be such as they are. The first one is that the paper and equipment parts are being imported and submitted to high import duty. The second one is that existing newspaper presses in Maputo and Beira are too

expensive to operate for the quantity they print. Thirdly, the poor management, skill level and work habits in most printing presses would incur extra cost.

Consequently, a change of ownership in the existing print presses does not appear a comprehensive solution to meet the need expressed by newspapers. On the other hand, for a new competitor to be able to offer cheaper prices, several conditions should be met.

Firstly, the issue of import duty would need to be addressed and it could not be done only for one of the print presses. Although it is highly desirable that the state be considering to wave import duties, at least on newsprint paper, this would not make any of the presses more competitive than others. We do, however, recommend that such duty exemption be granted, as it would help all printing presses and newspapers.

Secondly, a new press would require investment for a different kind of equipment than what is being used elsewhere. The existing print runs should be printed on sheets of paper rather than rolls to reduce waste, and with smaller and cheaper machines than those currently in use. Good repro facilities should be included to increase the competitive advantage of the new press – all other repro facilities are producing poor-quality work. The issue of the investment required to purchase the adequate press (even second hand), and repro equipment, needs further investigation. We would recommend that some additional technical consultancy be carried out on this matter, including after sale service considerations.

Thirdly, competent staff, trained to use, maintain and repair its particular equipment should operate the new press. It should also be managed competently by someone combining a solid managerial and printing experience. This is a particular challenge as most existing staff in the country has been trained on the old machines. In Beira, staff have been trained in-house to operate the new equipment they have there, but it was a short-term training offered by the equipment supplier who left the country shortly after.

The only printing school in the country is at Cegraf and offers no intern training in other businesses, on other equipment, to its trainees. As a result, even trainees and young professionals are far behind all new technology developments in the industry and could be of little use to work on a new press and repro facility, unless sent for training out of the country. The alternative would be that a new school is established and that the equipment used at the school is also used to print newspapers after some reasonable training period (two or three years).

Finally, being unlikely that such new press would 'steal' all clients from the others, it would need to also print commercial work, on different machines requiring different skills. There is however a lot of competition in this field at the moment, with Minerva Central, Central Impressora (Saúde), UEM and other commercial printers.

### **National press recommendation**

The only viable option would seem to be that one of these existing well-managed 'commercial' printers be the one that starts-up the new press, not relying on it to meet ends immediately and provided with credit facilities in the interim to cover for the investment. Unfortunately, none of those with whom we spoke seemed interested, although no credit facilities were mentioned. The issues of technical skills and growth management capacity were their main concerns.

1. The eventuality of enlarging current commercial printers' services to newspapers printing should be further discussed with them.

2. Independent newspapers interested in having another printing facility established in Maputo should demonstrate the viability of such eventuality on their own or explore possibilities for a joint venture between them and an existing commercial printer with proven managerial and technical capabilities.
3. Any request for assistance to establish such new printing facility should be submitted following the proposed criteria for assistance (see below under Recommended criteria for individual initiatives) with a complete business plan and all technical specifications. Assistance to such project should exclude full financing. It should provide credit facilities and perhaps a small grant to a viable commercial printer or joint venture with its own capital investment.
4. Printing press advanced technical training should be examined for possible improvement.

### **Provincial printing presses**

The argument in favour of the establishment of small printing presses in the provinces is unsustainable in the light of the small print runs produced out of Maputo.

There are only two publications exceeding 1500 copies in those provinces, according to the information gathered for this study. One is a national religious magazine printed in Nampula (*Vida Nova*) and the other is a provincial daily newspaper produced in Beira (*Diário de Moçambique*) – both on their own printing press.

The current print runs of the provincial newspapers do not warrant the establishment of additional printing presses, and the existence of one in Beira should permit Maputo-based newspapers to get some copies printed there should it prove to reduce their transport costs.

At least one of the provincial publications disposes of a copy printer. This printing machine, also used by commercial printers such as Xerox, Central and UEM to print small runs of newsletters, looks like a photocopier but is not photographing the original on each sheet. It produces a negative on the principle of lithography, with wax, and prints on each sheet from this negative. Expensive to use for small quantities normally done on a photocopier, the copy printer works better and cheaper for bigger quantities (500 to 5000) of moderates amounts of originals.

This appears to be an ideal solution for most provincial publications that, if they possessed one, could use it for their own production and for local customers – thereby generating income for their publication. The only inconvenience of this machine is that it will only print on ‘copying’ paper. However, until provincial publications will significantly increase their market, it would be advantageous.

### **Provincial press recommendation**

Credit facilities and small grants should be created for the purchase of copy printers in the provinces.

These should be made available preferably through the provincial Communication Centres (see below Assistance to joint initiatives).

## **Newsrooms**

Newsrooms' build-up may be assisted in various ways, according to the specific requirements and sustainability potential of each individual media operations.

Access to email and Internet and the number of computers, for instance, shall vary on the development stage of each initiative, its nature (print or broadcast) and the periodicity of print media (monthly, weekly, daily).

Assistance should be granted according to criteria (see Assistance to individual initiatives below) and access to Communication Centres (see Assistance to joint initiatives below).

## **Assistance mechanisms**

The UNESCO/UNDP Media Development Project has been contemplating to prioritise its assistance either directly to individual initiatives, or through common support, such as media resource centres. Both options appear valuable and complementary to us and they should ideally be both adopted. However, one or the other option may be selected depending on the available resources for individual assistance and the ability to mobilise the required support to establish common resource centres.

The current shortcomings of the media pluralism's effective impact and entrenchment have been identified in this study. In this light, priority in assistance should be given to the new national and provincial print media organisations (from the early 1990s onwards) for projects increasing their circulation and impact, and/or consolidating their income-generation capacities, and to community radio broadcasting.

### **Assistance to individual initiatives**

Despite the value of assistance through support to common initiatives, individual assistance remains important to maintain, in order to address specific needs possibly not addressed by common support. Three categories come to mind: Audience, Capacity, and Equipment.

Audience Grants that come to mind include assistance to individual media operations in relation to their ability to define, reach and increase their audience. Some of this can be addressed through common training courses for instance, but in some cases specific resources are required in-house: a database computer training course for the subscriptions manager, some field research or survey, a promotion or marketing tool, etc.

As the media's impact on their audience appears to us an area of concern for the effectiveness of pluralism, it would seem worthwhile to provide assistance in improving this impact. And this can mostly be done through individual assistance, on a merit basis – according to the impact and sustainability potentials of each particular assistance seeker.

Capacity Grants would include assistance to planning and development of new initiatives. These grants would be small (maximum USD\$5000) and would aim to assist with stages such as the development of the project's mission, constitution, registration, set-up of internal structure, organisational needs assessment, audience

needs identification, contents and business plan development, development of training policies, tools and activities, etc.

Equipment Grants should be considered carefully and in light of the availability of common equipment through media resource centres (see below). These grants could cover broadcast equipment in any case, as such resource centres will not provide these. Besides essential equipment, some broadcast equipment grants should not exceed 50% of the equipment value, to encourage beneficiaries to mobilise support from other donors. Transport means ranging from motorbike to others should be considered in the case of increased circulation projects or community gathering information.

All proposed criteria for individual assistance are common to all three types of grants but differ depending on whether the seeking media organisation is operational or in the form of project.

### **Recommended criteria for individual assistance**

1. Commitment to support and contribute to a democratic society and to the respect of all human rights.
2. Commitment to be present in and represent all sections of their target audience. This means all provinces in the country for national media, all districts in the province for provincial media, and all suburbs in the urban area or all villages in the districts for local media.
3. Evidence of the media's potential sustainability, including:
  - 3.1. A project document explaining the media's vision and strategy to achieve its overall objective/mission, including a description and motivation of the specific project for which assistance is requested.
  - 3.2. Operational media will include their editorial policy or information detailing their mission, format, ethical stand, content focus and target audience. Operational media will also provide a copy of their publication or programme schedule. The media projects may only describe their content focus and target audience.
  - 3.3. Media operations shall produce circulation figures or broadcast range, per section of their audience. Ex.: per province for national media, per district for provincial media, per area for districtal or local media.
  - 3.4. Both media operations and projects will provide information on their current registration and/or authorisation to broadcast. Operational media will also provide a copy of their constitutive documents.
  - 3.5. The media shall demonstrate its ability to mobilise and manage the necessary resources to achieve its objective. This includes information on the number and calibre of the human resource involved (employed and/or volunteers) and the material and financial resources at its disposal.
  - 3.6. All submissions will be accompanied with an expenditure budget and those including equipment purchase must also include quotations from at least two different suppliers. Information about current and alternative sources of income shall also be provided. Operational media are requested to provide their last audited financial report and evidence of other sources of income or support.

Donors should consider making Planning and Development Grants or qualified consultants available to media operations and projects seeking assistance when these

are unable to shape and provide the above-suggested information requirements. Donors would not waste on this exercise, even if it should eventually be concluded that no other assistance might be granted, as such exercise in itself would be an important contribution to media planning & management training.

### **Assistance to joint initiatives**

Nearly all media operations and projects have expressed, through this study, their interest in having common services and facilities with other media organisations. The question was put to them in order to explore the suitability of providing assistance to the setting up of provincial newsrooms and other joint initiatives.

#### **National media association**

Around 85% of all media operations have expressed their interest in joining a national media association. The question was understood to refer to a different association than the national journalists union, dealing with media organisations' interests in particular.

In this perspective, and considering the recent meeting held in Maputo where the re-launch of a MISA Chapter in Mozambique was discussed, it is recommended that assistance to this association's reactivation and capacity building be considered.

#### **National distributor**

As mentioned earlier and demonstrated in this study, print media operation and video producers are facing serious circulation problems. Although we believe that in some cases, individual Audience Grants should be considered, it is clear that the donor community is unable to separately address the need of each media operation in this regard. A cost-effective approach would therefore call for collaboration among media operations, around a joint distribution initiative.

The idea is not new. It has been discussed among the print media for some time, and video producers have taken initiatives in this direction at the level of Southern Africa some years ago.

The main obstacles encountered in setting up sustainable distributors are not numerous. They usually appear when the initiative is conceived as entirely self-financed from the beginning. They are also met when insufficiently qualified and limited human resource is meant to implement and manage the initiative. The lack of specialised training in the areas of planning, co-ordinating and managing joint distribution is also an obstacle that previous initiatives have met on their way.

However, once obstacles are identified, additional steps are possible. We would therefore recommend that support be envisaged towards such distribution initiative.

#### **Recommended steps towards a viable joint distribution initiative**

1. Identification of all interested and Strategic Vision development workshop to be organised with concerned parties. Non-profit or commercial options to be discussed, in both cases in a sustainable perspective. Identification of a steering body.
2. Elaboration of a collaboration agreement to be signed by interested and committed parties, leading to the development of constitutive documents setting a clear mission, governance structure, accountability mechanisms and financial principles.



3. Formalisation of leadership and governance over the initiative. Accountability mechanisms to be fully operational from this stage.
4. Elaboration of a strategy to achieve the goals set by the initiative, including all human resource, logistical and financial elements required. All interested to be consulted. Experts should also be consulted at this stage, from Mozambique and abroad if necessary. The Communication Centres described below could be considered as provincial distribution points, in the strategy.
5. Elaboration of set-up phase budget and operational costs budget. Identification of all resources that can be mobilised from all parties to the initiative.
6. Identification of assistance required from donors for the set-up phase. Identification of assistance required for operational costs, decreasing over a number of years to be identified.
7. Implementation of set-up phase, if resources can be mobilised by the concerned parties and donor community. Most criteria for assistance recommended below should apply.
  - 7.1. Commitment to support and contribute to a democratic society and to the respect of all human rights.
  - 7.2. Commitment to service all sections of their target audience.
  - 7.3. Evidence of support from all concerned.
  - 7.4. Evidence of the potential sustainability of the distribution initiative's applicant, including:
    - 7.4.1. A project document explaining the applicant's vision and strategy to achieve its overall objective/mission, including a description and motivation of the specific project for which assistance is requested.
    - 7.4.2. Information on the applicants' current registration and/or authorisation to operate. Applicants will also provide a copy of their constitutive documents.
    - 7.4.3. The applicant shall demonstrate its ability to mobilise and manage the necessary resources to achieve its objective. This includes information on the number and calibre of the human resource involved (employed and/or volunteers) and the material and financial resources at its disposal, and the ability to manage these.
    - 7.4.4. All submissions will be accompanied with an expenditure budget and those including equipment purchase must also include quotations from at least two different suppliers. Information on other expected sources of income shall also be provided.

### **Communication Centres**

The eventuality of assisting the creation of provincial newsrooms in common and media resource centres has been considered by the UNESCO/UNDP Media Development Project. The interest demonstrated by respondents, including broadcasters, towards joint facilities, the lack of access to communication equipment and facilities in the provinces and the recommendation to assist the acquisition of copy printer leads to recommend the creation of Communication Centres in the provinces.

Merging the concepts of newsrooms, media resource centres, Internet Cafés and Telecentres, the Communication Centres would be servicing the general community

where they are localised, but would be managed by the media operations and servicing them primarily.

The establishment of such Communication Centres would require a high degree of commitment on the part of Government, TDM (Mozambique Telecommunications), EDM (Mozambique Electric Power), provincial media operations and donors.

The Communication Centres should dispose of computer workstations (4-6), all connected to email and Internet, a scanning and computer printer facility, a fax, telephones, a photocopier, and a copy printer as start-up equipment. For an initial period of 5 years, all the equipment would be provided by and remain the property of government and/or donors.

The provincial media organisations, for their part, would form a partnership and register the Communication Centre as a private non-profit association, of which each of the provincial media organisations would be an equal member. Provision in the statutes of the association should be made to accept eventual new members. The private character of the association would not prevent public-owned media organisations, such as ICS community radio stations or publications, to become members. Any provincial media operation should be admitted to the association, and only foreign media or other kinds of organisations should be excluded.

A management committee of this new association would be formed of the members' administrators and, during the first five years period, TDM and government representatives. The management committee, in a volunteer capacity, would develop the Communication Centre's project, define criteria for daily management, recruit a paid-up general manager and meet as regularly as required to oversee the operation.

Government and/or donors would pay the general manager's salary for the first five years, in a decreasing proportion. Income from some of the services provided by the Communication Centre would gradually allow the shareholders to pay this salary and, eventual surplus would be saved to contribute to the Communication Centre's long-term sustainability.

Telecommunications services offered to telephone, fax and Internet users would be paid directly to TDM, whose unique investment (installation, users' training, and cards, codes or other forms of usage control) would be repaid over time through payment for the telecommunication services.

After a proven track record of five years, the equipment would be formally donated to the business running the Communication Centre. During the first five years, the business would only be responsible for the maintenance and management of the equipment, while repairs would be of the responsibility of the equipment owners (donors or else).

The Communication Centres should be well located in the provinces' capital cities in order to be easily accessible not only to media operations but also to any other potential clients. Whenever possible, they could be hosted in TDM buildings or post offices, granted that they would have a separate entrance and the freedom to close later if needed. This way, they would be close to communication services users and there would be no need to build new installations or bring prefab buildings as is done in some other countries. EDM should fully subsidise the energy consumption for the first five years and then gradually decrease its subsidy.

### **Recommended guidelines for the Communication Centres**

The following are guidelines for the creation and use of the Communication Centres – referred below as the CC.

1. The management of the CC should be kept entirely separately from that of the media operations responsible for and benefiting from them. To this end, for each CC, a registered association must be created, with its own constitutive documents, directors, bank account, etc. Such separation will permit a clear monitoring of the CC's management by all media involved, as well as an easy evaluation of its sustainability potential or lack thereof. It will also protect the media involved from any damage should the CC fail financially or otherwise, and from the risk of the CC being 'hijacked' by a single media – thereby ensuring that benefits are shared by all media involved.
2. From inception, all members shall pay for the services used by themselves in the CC, including telecommunications, photocopies, copy print, etc. as any other local client. They could benefit from a discount but they must pay all costs.
3. Clients from the locality should pay a little more than the members' rates to allow for long-term sustainability and future self-reliance. Members' staff personnel use of the CC shall be submitted to the clients' rates.
4. Both members and clients rates should be well calculated, regularly adjusted, non-negotiable and clearly announced. They should include a small fee towards a maintenance fund. Members' rates shall include labour from the manager, even if the manager's salary is paid from another source of income. Its cost will be the CC's responsibility after five years and savings towards this must start from day one.
5. All telephones and fax should only be operated with telephone cards or coins. Should no telephone cards be available locally, the CC itself will be the selling point of such cards for TDM. All members will be submitted to the same rules, to limit the accounting of telecommunications to the use of email and Internet facilities. In this case, Internet Cafés' mode of control and accounting will be used.
6. Reception of faxes should be charged to cover the cost of fax paper. A fax machine using ordinary A4 paper should be installed to avoid fax paper rolls cost and procurement problems.
7. The use of the photocopier and copy printer shall be managed as any commercial photocopy service. Rates should cover paper, toner or copy print product, maintenance fee and a contribution towards the CC's long-term sustainability.
8. The manager of the CC shall be selected following the management committee criteria and experienced in some of the equipment maintenance and repairs. The equipment suppliers and donors shall provide further training, including simple accounting and customers' service training.
9. The financial monitoring and management of the CC should be of the entire responsibility of the management committee, at least for the first five years.

## **Community radio**

### **Community Radio sites**

The UNESCO/UNDP Media Development Project has already identified three sites on which community radio stations may be implanted. These sites, all rural districts, have been recommended following a feasibility study that concluded on the need and community interest for such implementation.

Having no direct knowledge of these particular sites and their communities, no comments can be made here concerning their selection.

However, in light of the same project's objective to assist up to 10 community radio stations, some general recommendations for the seven other initiatives were requested and are presented here.

Our understanding of the concept of community radio is that of a community project whose mission is to contribute to the community's empowerment and socio-economic and cultural development, and that uses radio as a communication tool, or mean, to achieve this mission. As any successful community project, community radio requires community participation and 'ownership' (or adoption) to succeed.

Generally speaking, community radio initiatives should be supported following an «ideal community» approach rather than an «ideal site» approach. This means that sustainable community radio stations owe their success to the community to which they belong rather than to any other factor attached to its particular location.

What makes a community «ideal» for an existing or new community radio project may vary from case to case but the very best proof of it would be that:

- The community is already mobilised around the community radio project;
- The community already contributes human, material and/or financial resources to the project.
- The community can already articulate minimally the community radio's vision and strategic direction.

There have been cases, in Mozambique and elsewhere in the world, where those conditions for an «ideal community» were not present when a community radio project was established. As a result, many such projects have failed from the community angle of what community radio is really about, or have immense difficulties in operating the required transformations to make their project successful. Some of these have been more successful examples of community-oriented, non-participatory local radio.

However, in some very few cases, non «ideal communities» have eventually successfully adopted 'external' community radio projects. In these cases, when the project starts, the community is not mobilised, does not contribute and does not have a vision for something it ever thought about or wanted. The above-mentioned conditions have therefore to be built along the process of developing the project, with external assistance/intervention, from its very inception.

This can happen through either of the following ways:

- External experienced community organisers are brought in the community to assist the mobilisation, contribution and vision development process within the community (it takes one to two years before radio production training and transmission begin); or
- Endogenous community organisers from local organisations are given this responsibility from the external force that initiates the project (it can take longer before training and transmission happen if these community organisers do not have the necessary organisational skills to build a participatory project, with a democratic, transparent and accountable management).

The advantage of supporting «ideal community» types of community radio projects is that their sustainability potential is partly established through the community's mobilisation, contribution and vision for the project.

The other approach, based on the external selection of a site prior to the project's initiation among the community, is a more risky option as it may turn out that the community is not 'buying' or adopting the project – making it unsustainable.

Some maintain that this second option is really the only one that there is in Mozambique, arguing that communities do not spontaneously mobilise themselves for a community radio project.

While it is certainly true that communities seldom spontaneously mobilise themselves around a community project, it does happen occasionally. Besides, the spontaneous mobilisation of the community is not a condition for successful and sustainable community radio stations.

What is important and preferable, however, is that the community is mobilised by local community forces, rather than a force external to it. And that this happens at a very early stage of the project's development. Otherwise, it can be difficult to convince the community to sustain the radio. And sustainable community radio stations owe their sustainability to the community, as was said previously.

## **Community Radio assistance**

Assistance to community radio may take various forms. Following other donors' experience in the region (such as OSISA, Ibis, FES, etc.) four forms of assistance can be identified: Sector's development, Stations' planning and development, Stations' equipment procurement, Stations' programme production. We would prioritise the first three forms at this stage in Mozambique.

Assistance to the sector's development can be provided through supporting activities other than individual stations' activities. This includes national or regional seminars (as the envisaged one on the legislative and regulation framework for community radio for instance), training of community radio trainers, community radio training courses, production or adaptation of community radio training materials, exchange programmes, etc.

Assistance to individual stations' planning and development can be provided to support the development of new initiatives from start-up to frequency and license attribution, or to assist existing initiatives requiring planning and development reinforcement. Planning and development assistance may be directed to the community mobilisation itself, identification of key local people to participate in the project, drawing up a mission statement and constitution, registering the project, electing/appointing board members, carrying out needs assessment or community surveys, developing a programme schedule, developing a business plan, in-house training, etc.

Assistance towards individual stations' equipment procurement can be provided to support first acquisition or upgrading of broadcasting equipment. These grants may cover for broadcast studio equipment (for on air studio), field recording equipment, transmission equipment, and in some cases production studio equipment (or back-up studio). In some cases, some form of transport means should also be considered (even bicycles, thinking of people interrupting broadcasting early in the evening for lack of transport to go back home).

The criteria for assistance to the sectors' development should slightly differ from those applicable to individual stations' planning and development or equipment grants.

Several criteria should be common to all community radio grants and other media grants.

### **Recommended criteria for community radio grants**

1. Commitment to support and contribute to a democratic society and to the respect of all human rights.
2. Commitment to be present in and represent all sections of their target audience. This means all provinces in the country for national media, all districts in the province for provincial media, and all suburbs in the urban area or all villages in the districts for local media. *(N/A to assistance to the sectors' development)*.
3. Evidence of community support for the community radio station (ex.: letters, petitions, list of name of volunteers participating, etc.). *(N/A to assistance to the sectors' development)*.
4. Sectors' Development projects shall be required to demonstrated knowledge of the community radio sectors and proven ability to ensure that the project will benefit to all involved in the sector.
5. Evidence of the potential sustainability of the community radio applicant or sector's development applicant, including:
  - 5.1. A project document explaining the applicant's vision and strategy to achieve its overall objective/mission, including a description and motivation of the specific project for which assistance is requested.
  - 5.2. Operational community radio station will include their editorial policy or information detailing their mission, format, ethical stand, content focus and target audience. Operational community radio station will also provide a copy of their programme schedule. The community radio projects may only describe their content focus and target audience. *(N/A to assistance to the sectors' development)*
  - 5.3. Community radio operations shall produce circulation figures or broadcast range, per section of their audience. Ex.: per province for national media, per district for provincial media, per area for districtal or local media. *(N/A to assistance to the sectors' development)*
  - 5.4. *All sector development applicants shall provide a plan demonstrating how their project will benefit to all involved in the community radio sector.*
  - 5.5. Both operational and project applicants will provide information on their current registration and/or authorisation to broadcast. Operational applicants will also provide a copy of their constitutive documents.
  - 5.6. The applicant shall demonstrate its ability to mobilise and manage the necessary resources to achieve its objective. This includes information on the number and calibre of the human resource involved (employed and/or volunteers) and the material and financial resources at its disposal, and the ability to manage these.
  - 5.7. All submissions will be accompanied with an expenditure budget and those including equipment purchase must also include quotations from at least two different suppliers. Information about current and alternative sources of income shall also be provided. Operational applicants are requested to provide their last audited financial report and evidence of other sources of income or support.

Donors should consider making Planning and Development Grants or qualified consultants available to community radio operations and projects seeking equipment assistance when these are unable to shape and provide the above-suggested information requirements. Donors would not waste on this exercise, even if it should eventually be concluded that no other assistance might be granted, as such exercise in itself would be an important contribution to community radio training.

## **Gender imbalance**

### **Towards gender balance in media operations**

A recommendation was requested by the Media Development Project in order to effectively address and redress the serious gender imbalance of the Mozambican media.

One of the obstacles to greater gender balance is that fewer female than male professionals are trained and available for employment. In this regard action must be taken at the level of women entering the profession – an issue discussed further below.

The other obstacle is found within media organisations that have not yet undertaken developmental changes in favour of greater gender equality.

«Challenging gender inequalities in counterpart organisations in a development intervention is still very often treated as unjustifiable interference in another culture... [However] external accountability on the part of Southern counterparts to Northern donor agencies – and, as we have noted already, vice versa – can provide the catalyst for initiating processes of change towards more equal gender relations in the organisation.» – *Gender and Organisational Change*.

There are Mozambican women who insist that national or organisational development cannot happen without touching and involving both men and women. But why should that be?

«There is a direct correlation between organisational development and the extent to which an organisation is able to have an impact on the wider world in which it operates. This correlation holds for the specific aspects of organisational development which address the need for great gender equality.» *Ibid.*

In this perspective, only increasingly gender sensitive media organisations could increase their impact on both male and female audiences. We have seen that gender parity is not yet achieved in media organisations, with women representing only 22% of all media personnel. Gender commitment, perhaps more importantly, has not been analysed in this study, although it has been found that 10% of described editorial policy express such commitment at content level.

### **Recommendation for greater gender equality in media organisations**

Donor organisations are encouraged to adopt a positive approach, encouraging and rewarding good performance in gender matters, rather than sanctioning poor performance. Gender commitment and effective gender balance should not be

imposed as a condition for funding support but rather promoted by donors (Eade, 1991).

As part of support towards organisational capacity development, the Media Development Project in particular could:

1. Promote a wide discussion across media organisations on values and practical meanings of gender parity, gender equality and gender balance. This could be done through the broad circulation of locally adapted and Portuguese-translated materials existing on the question, including gender training materials collected by media training organisations.
2. Hold a national workshop on gender in media organisations, involving media management, to discuss and analyse organisational strategies towards greater gender equality within media operations. This workshop should cover organisational mission and overall goals, organisational values, organisational structures, management styles, job descriptions, conditions of employment, practical arrangements / space / time, relationships and power, images and symbols, etc. (ref. *Gender and Organisational Change*).
3. Hold a training course on media gender output, directed at male and female editors and journalists, to develop gender-sensitive journalism skills. This course should include editorial policy development, sources, language, criteria for news agenda, and coverage of the 12 critical areas of concern identified in the Beijing Platform (ref. Patricia A. Made, *NSJ Centre's Gender and Media Training of Trainers*, 1997).

Further studies should be carried out on gender commitment (i.e. policies and practices) within media organisations, as a follow-up to the UNESCO-sponsored study of the newspapers' front pages in Southern Africa, produced in 1994 by the Federation of African Media Women.

Some strategies have also been developed in *Gender and Organisational Change* for organisations already committed to work towards greater gender equality. These cannot be detailed here but include:

1. Revisiting the mission statement and objectives;
2. Stakeholder analysis;
3. Policy formulation;
4. Strategic planning;
5. Training;
6. Allocating budgets;
7. Setting targets for reaching gender parity in staffing;
8. Altering recruitment criteria and procedures;
9. Restructuring departments to mainstream gender;
10. Appointing one or more gender responsables;
11. Making the workplace and workstyle more woman-friendly in various ways;
12. Devising and implementing gender equality monitoring and evaluation mechanisms;
13. Securing the commitment of top management to change towards greater gender equality.



## **Towards gender balance in the profession**

The family and cultural environment frequently oppose to women practising journalism, as it often involves irregular work hours and at times travels. This opposition impacts on the fact that fewer women than men do wish to enter the profession. It also serves as a justification for media management and media training institutions to not have more female employees or students.

However, women themselves also often hesitate in taking up a job that will require difficult sacrifices, not only of their home-life but also of their life values. This also serves as a justification for media management and schools to not accommodate women who are prepared to make sacrifices and adjustments to advance their career.

One possible compromise is flexibly. If women are prepared to adjust, employers and schools should also be more flexible with their working or study hours – if they really are committed to a greater gender balance.

### **Recommendation for greater gender balance in the profession**

Training more female journalists and media managers is obviously a good way to improve gender parity and equality in media operations. As such, the recent decision of the *Escola de Jornalismo* to offer evening classes is welcome and even more if it includes weekend courses.

A gender-committed marketing and recruitment strategy is therefore required within training institutions, including the *Escola de Jornalismo* but also secondary schools and other technical schools and universities. This could include:

1. Career days open to the public should be held in public schools, inviting women journalists and media managers to speak to eventual female students and the public about the profession.
2. Media studies should be promoted with the media collaboration, through free advertising of the schools and institutions involved (including technical schools offering media-related studies), using well-known female figures in the profession to do the promotion.
3. Media-related studies curricular reforms should include gender issues in media content's production and internal media organisations. Issues to consider for inclusion could include the those mentioned in the previous recommendation and:
  - 3.1. The need to take gender into account as a factor in political and economical analyses;
  - 3.2. The continuing need to sensitise people to the gender aspect of human rights and democracy;
  - 3.3. Under-representation of women, particularly in technical media jobs such as radio and TV electronics maintenance and repairs, and printing press technicians;
  - 3.4. Recognition of the double responsibilities of private and working lives for both men and women;
  - 3.5. The direct relationship between gender equality and high-quality performance, etc.



## Perspectives and conclusions

### Or where to go from here

As it had the ambition to document as methodically as possible its observations and recommendations, this study has been a challenging exercise to conduct. As a result, it had to overcome several obstacles, including human resource, time and financial constraints.

However, as it reaches its conclusion, the exercise proves fruitful.

It demonstrates that there is real media diversity in Mozambique, but that efforts need to be deployed to render pluralism more effective and entrenched. It provides to the donors' community a range of information, data and suggestions to contribute to such efforts – some of that shall certainly be useful.

To the media community itself, it provides a guarantee that a new phase is concluded in the UNESCO/UNDP Media Development Project, allowing the project to engage in new activities that will also benefit the media in this country.

It also provides confirmation that the training programme developed by the UNESCO/UNDP Media Development Project corresponds to real needs with regards to the media's current level of human resource's skill development, although some important issues were not included – such as gender training.

While impatience grows among quarters whose priority may not have been on training, time has come to also engage proactively in direct assistance to the media community and individual organisations to address other key factors of sustainability.

As a matter of urgency, decisions should be made concerning the proposed priorities and criteria for grant assistance. Mechanisms and timeframes should also be put in place for analysing, accepting or rejecting grants applications. These decisions should then be made public and attribution of grants should begin.

Grant administration requires full-time personnel in donor organisations. It would most probably require additional staffing in the Media Development Project, preferably with a strong organisational administration background and visibly independent from the sector's interests.

In parallel to this, and to complement to work achieved for this study, an in-depth and focussed technical consultancy on the need for and possibility of assisting the creation of a modern and cost-effective newspaper printing press should be undertaken shortly. It would further inform a final decision of the matter within the Media Development Project.

Likewise, the analysis of the proposed Communication Centres should begin and, if adopted as a valid option, put in place gradually or partly. This suggestion would require time for implementation and should not delay grant components of the Media Development Project.

Furthermore, the implementation of three community radio stations in the selected sites shall be expected to take at least a year or two prior to possibly becoming operational and go on air, and the risks involved in the strategy chosen shall never be underestimated. The success of these stations shall therefore not condition the community radio grants proposed in this study.

The Mozambican media's particular dynamism has permitted huge advances in the past decade, especially so soon after the prolonged war that dominated the country. The freedom of the press clearly established by the constitution and legislation is an achievement that several SADC countries with less traumatic history are still far from.

This favourable environment is furthered by the existence of the Media Development Project's resources, a unique opportunity that has no equivalent in the region or elsewhere around the world. Such resources have the potential to create tension or competition among media players, but are also meant to benefit all of them – directly or indirectly.

The spirit prevailing in the Media Development Project's is one of assisting several sectors of the Mozambican media community, mainly through common assistance and decentralisation project components – and maybe through grants as we suggested. The private print media, public radio and community radio sectors have already been identified as key beneficiaries of the project. Other donors may choose to concentrate their efforts also, or instead, on other sectors, and through the same or other kinds of project components and mechanisms.

Pre-established funding priorities and policies will largely determinate donors' support to the media community. But the participation of representatives from the media sector to a study such as this one and within donors' consultative structure also has an important impact on the relevance of donors' support. Hopefully this report will assist decision-making processes among the Media Development Project and wider donor community.

Ultimately, the common objective one would want to see shared by the media community, the Media Development Project and other donors in Mozambique is the reinforcement and entrenchment of media pluralism and dynamism, through increasingly impact-effective and sustainable media organisations.

