

Final ‘Learning Review’ Report



ILO Small Enterprise Media in Africa (SEMA) Project: Uganda

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Executive Summary

The ILO SEMA (Small Enterprise Media in Africa) project addresses a critical constraint to small enterprise development to provide access timely and relevant business information to entrepreneurs in Uganda. The project partners with private sector service providers to increase the number and outreach of radio programmes specifically focused on the small business sector. It attempts to support small enterprise development and business environment reform in order to foster the growth of small and micro enterprises and thus stimulate economic growth. The overall objective of the intervention is the elimination of poverty by contributing towards conducive and equitable environments for entrepreneurship, small business survival and growth using the media.

The initial phase of the project concentrated on business services delivery: and worked to maximize the potential of radio stations to enhance the flow of information to, from, and within the private sector in a sustainable manner for the benefit of small businesses. It sought to capacity build the commercial mass media to provide business information, platforms for debate on business issues, a voice to influence policy processes and a channel for the delivery of business advisory services. It did so by partnering with media trainers to capacitate the production and sales departments of a small number of radio stations. The project was designed to specifically address the issue of 'paid to air programming' that has traditionally been driven by content owners buying airtime and providing supply led content. The SEMA model aimed to capacitate stations to engage interactively with audiences and content owners to provide demand led programming that would attract listeners and therefore advertising revenue from advertisers and sponsors. The mission was to ensure the long term sustainability of business programming without continued project support to stakeholders.

The project built consequently upon its initial successes and took an evolutionary journey from a pilot exercise to an up-scaled programme during its second phase, working with numerous stations across Uganda. It engaged with other stakeholders in the industry and has sought replication of success initiatives both in the market and by other practitioners in other countries. Over the years the project evolved to respond to issues within the broader media industry and developed a systemic approach to ensure sustainability of both the radio programmes and of the media market itself.

In its final phase the project sought to maximize the potential of the project to influence the way private sector development integrates media into its work both in Uganda and internationally. It has sought to consolidate its successes and focus on exiting the market via a number of targeted activities. One of these key activities is the consolidating, documenting and disseminating of learning of the project. In response to this, the project has engaged in activities focused on the wider popularization and replication of the media programmes. Despite some excellent descriptions of the conditions and antecedents that contributed to the success of radio as a development tool, the project sought to undertake a further evaluation exercise. This review is designed to support SEMA's learning and dissemination agenda and aims to document the key learning points, critical success factors and underlying conditions for success of the project.

Therefore this is not a traditional evaluation of the project but rather an attempt at documenting findings. The key objective is to develop a resource document that offers practical information able to comprehensively guide SEMA project replication by practitioners in other settings. This report contains information gathered for this output but is not the output itself. This report is intended for project staff and donors and contains some information and process information which is deemed unnecessary for replication. The key findings highlighting the practical know how for replicating a similar project, are thus detailed in a separate set of learning resources (e-tool) which accompany this report.

The review looks across all the phases in order to draw out lessons and isolate elements that contributed towards success. The final extension was informed by recommendations from a previous evaluation which have been assimilated in this review; therefore more attention is paid

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towards gathering lessons from the final phase. The findings are gathered from a desk review of project documentation, a series of interviews with project staff and industry service providers, plus a project stake holder's workshop. The choice of methodology has allowed for a 360 degree view of the intervention and has captured the voices and comments of the key staff, project partners and media industry players in Uganda.

This report highlights the models, activities, approaches and methodologies required to replicate the project in other environments and the pre conditions necessary to do so. Throughout the report, key lessons, challenges and critical success factors have been annotated to provide for reader focus. This review:

- Defines the key problems and constraints which the project addresses and details the overall solution that the project provides.
- Describes what the project is designed to do, why and how and provides an overview of the media environment in Uganda in order to contextualize the project concept.
- Defines the project principles, overall aims and the underlying causal model employed with reference to the different stakeholders. It also comments on project design, the role of the project and the model employed.
- Defines the pre conditions necessary for replication and the value proposition for the various stakeholders.
- Comments on establishing and driving project partnerships and considerations that must be taken into account during implementation.
- Remarks on the project time frame, management and supervision style, team make-up, monitoring and evaluation components and budgetary considerations. It also details the key approaches and practices adopted.
- Comments on implemented activities in support of outputs for the extension phase to add value to the lessons already drawn from previous reviews.
- Details future opportunities and areas of consideration for practitioners replicating the intervention.

The review team has compiled an extensive amount of relevant and valuable information that has been absorbed and incorporated into the accompanying e-tool. This e-resource attempts to answer all the possible questions for any replication effort by employing a combination of visuals, text and audio files which intend to engage the user in a dynamic and motivating manner. It is expected that this user friendly CD Rom will be published and disseminated to practitioners in other countries via seminars and workshops (such as the annual BDS conference) and uploaded to relevant websites for downloading (such as ILO, MMW4P, SEEP Network and SE donors).

This resource charts the success of a project that has promoted the media as a key driver of private sector development while at the same time challenging that way that media does business in Uganda. The project has made markets work better for poor people by strengthening the delivery of business information across the small enterprise sector. It has done so in such a way that does not undermine the private sectors ability to address its own problems. The project has used indirect 'facilitative' approaches to avoid driving the overall agenda. It has built upon what the private sector is offering, avoided long term subsidies, promoted competition and used subsidies to demonstrate opportunities with a clear exit strategy in mind. It has worked hard to leave behind commercial radio programmes, transactions and institutions and engendered sustainability at all levels of the project. It is a strong example of a systemic project that makes the whole media market work better by delivering value across the whole market and ensuring its responsiveness and resilience. The project has undoubtedly broken new ground and unquestionably helped to establish best practice in business development service delivery and private sector development.

Acronyms and Abbreviations

SEMA	Small Enterprise Media in Africa
ILO	International Labour Organisation
SIDA	Swedish International Development Agency
SED	Small Enterprise Development
SMEs	Small and Micro Enterprises
BE	Business Environment
MSEs	Micro and Small Enterprises
MIS	Market Information Services
FAO	Food and Agriculture Organisation
NGO	Non Governmental Organisation
PSD	Private Sector Development
MDN	Making Development Newsworthy
UAMPS	Ugandan All Media and Product Survey
PEAP	Poverty Eradication Action Plan
MDG's	Millennium Development Goals
BDS	Business Development Services
MMW4P	Making Markets Work for the Poor
CTA	Chief Technical Advisor
NPC	National Programme Coordinator
IDP	Internally Displaced People
SP	Service Provider
TORs	Terms of Reference
CBS	Central Broadcasting Service
NABS	National Association of Broadcasters
UMDF	Uganda Media Development Fund
NBS	Nkabi Broadcasting Services
NUWCO	Northern Uganda Women's Communicator's Organisation
ACF	Action for Hunger
SMS	Short Messaging Service
GPRS	Global Packet Radio Service
WBS	Wavah Broadcasting Service
UBC	Uganda Broadcasting Corporation

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1. INTRODUCTION

1.1 Background

This report represents the independent 'lessons learnt' evaluation of the ILO SEMA (Small Enterprise Media in Africa) project and its final three-year phase from January 1st 2006 to June 30th 2009. This phase is a three-year extension of the two-year phase one which ran from 1st January 2004 to 30th September 2005. The project has been fully funded by the Swedish International Development Agency (SIDA) and was implemented by the International Labour Organisation (ILO). Previous to this the project built upon work undertaken by FIT Uganda, which sought to stimulate coverage of business issues through the Ugandan radio industry. Project support for this phase totalled US\$ 1,491,312.

1.2 Evaluation Objectives

In order to support the wider popularization and replication of the media programmes in Uganda, this learning review documents the key learning points, critical success factors and underlying conditions for success of the two sequential programmes – FIT Uganda and then ILO SEMA. **See Annex 1 - Review TORs.**

The success of these programmes has been well documented in a series of papers by the early programme officer – Gavin Anderson and his colleagues from the Springfield Centre. Recently, the project documented experiences and produced a series of papers on making markets work for the poor – M4P – which has further popularised the project and introduced it to an even wider international audience. Despite this excellent documentation and some very good descriptions of the conditions and antecedents that contributed to the success of radio as a development tool in Uganda, many still ask – how was it done?

Therefore this is not a traditional evaluation of the project but rather an attempt at documenting findings and producing a user friendly report to enable interested practitioners in other countries to replicate its success. The impact of the radio programmes and content messages communicated to the target audience and other participants have not been investigated in this study. The review looks across all the phases of the project in order to draw out key learning points and success factors.

The final extension of the project was informed by recommendations laid out from a previous review carried out in April 2005 by Hitchins and Prag. The documented learnings from this review have been incorporated into this report therefore more attention has been paid towards gathering lessons from the final extension phase of the project. The evaluation of this final phase project against the log frame is beyond the scope of this review and nor does this review intend to explain the outputs of each phase or evaluate each phase individually. However the report does comment on performance against outputs for the extension phase in order to identify learning points and critical success factors.

SEMA has seen it as critical to place great importance on an explicit and targeted learning and dissemination agenda and this review contributes directly towards fulfilling this learning agenda. It specifically highlights the models, approaches and methodologies required to replicate the project in other environments and the pre conditions necessary to do so. This includes a review of both the strengths and weaknesses of the business model and approaches used and highlights the key success factors that contributed most to project success such as, macro environment, media environment, project management and monitoring, activities implemented, and project costs/budgeting.

The objectives of the evaluation are as follows:

1. Undertake an end of project evaluation of the whole Sida funded SEMA project for the purpose of informing on replicating a similar project in other countries.

2. Develop a high quality resource document that offers practical information on how replicating SEMA can be successfully done. Within the resource document give insights into factors leading to success or failure, what makes up the ideal environment where such a radio project is likely to succeed and what adjustments need to be made. Include the capture all the business development service concepts that can be used to address the various capacity building areas to be replicated within such a model.
3. Successfully finalize the resource document after presentation to the end of project review meeting.

The main deliverable for this assignment is a resource document able to comprehensively guide SEMA project replication. This report contains information gathered for this output but is not the output itself. The organized summary of major findings and recommendation are detailed in a separate set of learning resources (e-tool) which accompany this report. This highlights the practical know how for replicating a similar project in other places. It attempts to answer all the possible questions for any replication effort based on the SEMA project experience.

Key research objective:	Key research questions:
To identify key learning points and critical success factors of the project for replication by other practitioners	<ul style="list-style-type: none"> • What worked and what didn't work so well • Where did the project go wrong? • What elements contributed most to the project success? • What approach was used by the project? • How and why did specific project activities contribute to the overall success of the project? • Can the approach be replicated in other settings or environments? • Which aspect of the initiative can be replicated? • What makes up the ideal environment for a similar project to succeed?

The hypothesis is that if the key factors leading to success or failure can be isolated then a practitioners tool can be developed that will aid project replication in other settings.

In order to best support project replication it was agreed that this separate more 'user-friendly' resource would be required to disseminate to practitioners in other countries. The tool focuses on practical guidance and uses a combination of visuals, text and audio files which intend to engage the user in a dynamic and motivating manner, such that cannot be achieved with a purely written and linear report. Furthermore this donor report contains some proprietorial information and process information which is deemed unnecessary for replication.

The intention of providing the e-tool is to specifically aid the replication of a SEMA intervention elsewhere to support small enterprise development and business environment reform in order to foster the growth of small and micro enterprises and thus stimulate economic growth. As a resource 'pack', it is intended to comprehensively guide project replication via the documentation of the key learning points, critical success factors and underlying conditions for success. It highlights the models, approaches and methodologies as well as highlighting the role of radio and mass media's ability to impact on small scale businesses and the enabling business environment.

1.3 Methodology

The research work was carried out in June 2009, the team comprising Ailsa Buckley as Team Leader/Private Sector Development (PSD) Expert and David Sanders, as the Media Development Specialist.

The process was carried out in three key stages:

- Desk review of project documentation accrued from the ILO SEMA team in Uganda.
- A seventeen day field trip to Uganda, which included key interviews with stakeholders; the ILO SEMA project team, core external consultants, participating radio stations, content providers, advertisers, other representative bodies. Also a workshop was held in Kampala comprising members of the above to validate and boost fieldwork findings.
- Post field work analysis and sweat shop sessions with the review team to structure and develop the report and learning resources.

Detailed interviews with key informants and stakeholders were implemented. **See Annex 2 - List of Interviewees.** These included independent evaluators, technical back stoppers, donor agencies, media industry research firms and key industry stakeholders:

- Donor and other independent evaluators - individuals whom were specifically involved within the funding line across either and both phases - both ILO and SIDA were represented.
- Internal FIT SEMA staff including those staff involved throughout the project.
- Radio station providers - senior management staff involved in buy in and ongoing commitment, programme producers and sales staff to determine their opinions on what were the most important activities, support and interactions between them and project. The sample of stations were selected based upon the following criteria:
 - Big versus small
 - Rural versus urban
 - Previous versus current phase
 - Drop outs versus long term partners
 - Heavy technical support versus light touch
 - Heavyweight cost recovery versus low degree cost recovery.
- Other service providers such as trainers and ancillary media production houses
- Content contributors - organisations who have participated in providing content (regular or otherwise).
- Advertisers/sponsors - senior marketing people associated with the marketing decisions which have commercially supported the initiative.
- Media research - Uganda based media research companies who are engaged in either audience monitoring or advertising spend monitoring (e.g. Steadman).

See Annex 3 – Fieldwork Tools.

On completion of the field work the consultants aggregated the findings and undertook an analysis of the results to determine and understand the key elements which contributed to the potential for further replication of the project concept.

This synthesis was presented to stakeholders in a forum that allowed them to comment and contribute. It also allowed validation of findings and was used to gain further insights into information gaps not captured through the field survey.

This information was then utilised to prepare the final outputs which include this donor report plus a separate resource tool to enable replication among practitioners. Presentation of the final draft report and resource tool will be made in an end of project review meeting in Kampala in September 2009. Concluding amendments will be made to this report and tool after this meeting and the final outputs then submitted.

1.4 Report Structure

The report is intended to principally identify and isolate the factors which contributed to project success. It looks to quantify the approaches taken with the intervention and document their

performance. Whilst the report notes areas of comparative strength and weakness, it is focused on the systemic approach of the intervention. Throughout the report, key lessons, challenges and critical success factors have been annotated to provide for reader focus. These are flushed out further in the accompanying learning tool.

The report is laid out in the following sections:

- Firstly, it scopes out the background to the project concept and details the key problems and project solutions. Subsequently it provides overview of the Ugandan media environment and describes the context of in which the project operated and, in particular the motivation for the project extension.
- It then looks at the overall project design with comments on the overall aims, causal model and business models employed. It also defines the necessary conditions for replication.
- The next section comments on the evolution of the project and implementation considerations such as the time frame, team balance and management style, key approaches, monitoring components and budget.
- The report then draws out lessons and critical success factors from the extension phase to add to comments from previous evaluations already assimilated.
- Finally the report details observations and potential future opportunities drawn from project experience.
- At the end of the report are the references and annexes.

2. PROJECT OVERVIEW

This section intends to define the key problems and constraints which the project addresses and details in brief the overall solution that the project provides. The purpose of this background section is to enable practitioners in other countries to quickly understand what the project is designed to do, why and how. Finally this section also overviews the media environment in Uganda in order to contextualize the project concept for better understanding.

2.1 Project Context

The Problem¹

A large majority of households in developing countries are reliant on small business, farming and self-employment especially in rural markets. In Uganda, this represents some 87% of the working population. But factors such as literacy, affordability, accessibility and language, lead to a divide between information-rich urban and information-poor rural populations. Information plays a critical role in all aspects of business and a lack of access to other media often makes radio the only source of information beyond word of mouth. However, media is often targeted at the urban elite where there is greater population and commensurate concentration of advertising revenue. Indeed, radio stations often fail to see and identify ways that they can target the rural market, harness advertising revenue and generate profits from rural targeted advertising spend. Despite the popularity of vernacular stations, they also remain risk-averse in terms of their programme formats and content, which generally remain focused largely on entertainment for urban audiences. In addition, many rural stations are independently owned, so there are limitations in a station's capability to invest in the development of alternative content especially without the promise of rapid advertising traction. This includes quality and quantity of staff and infrastructure necessary to meeting these needs. Even where radio stations do understand the potential audience value offered by the rural market, for the most part they do not enjoy close linkages with that listenership and thus fail to identify what information their audiences need and want plus where to acquire this information.

Notably stations often see the involvement of third party content sources as an income opportunity, demanding payment for airtime for the short run programmes. This results in unsustainable, non-commercial services. In tandem, content owners and numerous donor-funded initiatives have fuelled this supply led model. Often very well received and informative programmes end when donor funds finish leaving audiences wanting. The long-term sustainability of the broadcasting of market information services (MIS) remains questionable.

"By and large these have failed to meet their objectives and have experienced problems of sustainability. In Africa, MIS have tended to thrive while supported by donor projects, only to fade away when the donors leave. Farmers will continue to be poorly served with market information if progress is only made on the basis of initiatives of donors and non governmental organisations (NGOs). Indeed, in some cases these initiatives may be counterproductive when they offer the possibility for radio stations to be paid for market information broadcasts. Stations come to see these programmes as the equivalent of paid advertisements."

Andrew Shepherd 2001 Food and Agriculture Organisation (FAO) conference on Farm Radio Broadcasting².

¹ Parts of the following are distilled from 'Integrating mass media in small enterprise development: Current knowledge and good practices' by ANDERSON (2008).

² See 'The Role and Impact of Radio in Reforming the Rural Business Environment in Africa. A study of Private FM Radio in Uganda'. ANDERSON and ELLIOT (2007).

The Concept³

Media liberalization and diversification is a global and in the case of broadcast media, a relatively recent phenomenon across many countries. The growth of media industries can be seen as a significant opportunity to make media work better for the poor.

Mass media based strategies provide solutions to tackle the lack of information on markets and regulations as well as the low entrepreneurial culture that sometimes deprives entire regions of a large number of employment opportunities. Radio is generally the most appropriate media to reach poorer, less educated and non-urban listeners that form the majority of the population in Uganda. Entry point costs coupled with breadth of coverage, demonstrates that (with weekly reach well in excess of 90%), radio remains the only mass-market medium in Uganda.

The outreach of radio makes it an ideal medium as an advocacy and information service to rural producers. But private media must be harnessed for enterprise development in a manner that ensures that the desire, skills and momentum for change is maintained beyond the life of any donor programme. A key factor in the SEMA success is the approach of the interventions in focusing on sustainability and innovation in radio programme formats, in contrast to traditional approaches to working with the mass media. It used mass media as an entry point in small enterprise development and targeted the mass media as a critical part of the 'business environment' capable of providing business information, business services, representation and a voice for small enterprises. The Uganda project grew out of a response to these issues and ultimately demonstrated an overwhelming need for the development of information channels, which are directed by and involve rural audiences.

Learning Point⁴

Media is an important institution for private sector development: It acts as a platform for civil society to influence legal and regulatory frameworks, contributes to the building of human capital and can contribute to stimulating increased employment in the labour market. Media is part of the 'physical capital' or infrastructure, in the same way as telecommunications that stimulates and supports private sector growth. It is a channel through which direct information, advice and services can be provided to business women and men.

The Solution

Over a period of 9 years, the SEMA project worked to deliver sustainably improved incomes for the poor. This was achieved using interactive small business oriented radio programmes aimed at improving the business environment for enterprise development.

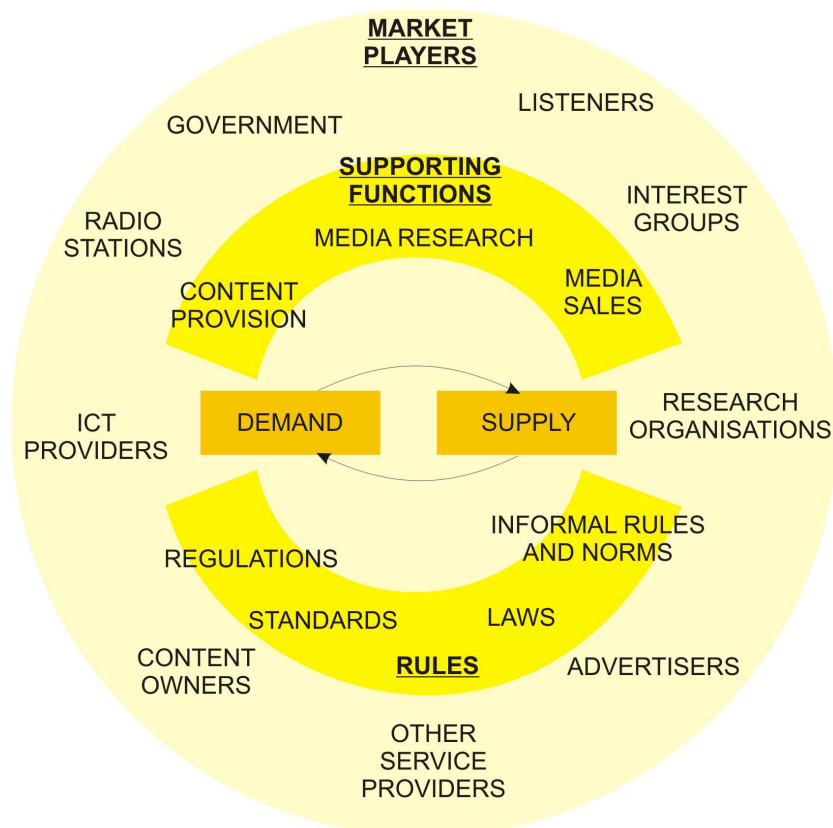
The project facilitated the development, launch and marketing of profitable programming by working with a variety of commercial radio stations. No distinction was made as to whether stations were public or private, commercially or community focused. Radio programmes were delivered in a range of vernacular languages and gave voice to their listeners. The model further promoted relevant and timely demand led content for the programmes via the engagement of content owners and experts. Content aims to build improved knowledge of business related subjects amongst their audiences. The application of knowledge amongst small business would lead to improvements in performance which would result in increased incomes and provide additional employment opportunities. It subsequently sought to promote commercial sustainability via the engagement of advertisers and sponsors. Additionally, the project worked to influence policy reform with the expectation of benefits such as reduced burdens, better infrastructure, plus access to opportunities, services and inputs.

³ Parts of the following are distilled from 'The Role and Impact of Radio in Reforming the Rural Business Environment in Africa. A study of Private FM Radio in Uganda'. ANDERSON and ELLIOT (2007).

⁴ Excerpts from the ILO the 'Project Document. Extension of the Small Enterprise Media in Africa (SEMA) Project in Uganda'.

SEMA has successfully focused on embedding business related programming into private broadcasting in Uganda. This means understanding the sector and the incentives and capacities within the market system. Interventions were explicitly pursued with the objective of sharpening incentives to innovate and develop new programming focused on business issues. It is about capacitating stations to develop and mainstream programming that delivers the right information in a timely fashion which drives listenership, attracting advertising revenue and sponsorship. It involves reducing the risk of innovation, neutralizing constraints, and building the capacity to innovate at the station level both in production and in sales and marketing. It does so via a host of local expert consultants contracted in the short term to capacitate the stations and build a commercial market for such services in the long term.

SEMA has demonstrated that radio programming must respond to local issues and problems rather than acting as the messenger for a development organisation or donor project. Making development newsworthy and ensuring that content is appropriate requires the brokering of partnerships between stations and content owners and the embedding of a strong editorial programme policy. Programme profitability is essential for the long term sustainability of information services and results in the programmes continuing to broadcast after the interventions cease and continuing to play a role at both the policy and enterprise level. This involves brokering partnerships between stations and advertisers and commercial sponsors. In short media projects should work to strengthen the whole 'media system' not just deliver services that benefit business. SEMA is an example of a market development⁵ approach to stimulating the sustainable growth of a whole business service industry for long term benefit of all its players. Such a media market is scoped out below showing the players, functions and business environment⁶:



⁵ Concepts distilled from Seminar Reader (2006). 'Implementing Sustainable Private Sector Development: Striving for Tangible Results for the Poor'. ILO.

⁶ Adapted from Making Markets Work: Springfield Centre.
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2.2 Media Overview in Uganda

Media Profile

In order to set the context of the SEMA project it is important to understand the state of play within the Ugandan media environment. Over the course of the project the market continued to expand, with growth in all key media sectors. Within this, radio remains the fastest growing media channel, with the issuance of 200 broadcast licenses, of which between 175 to 190 stations are currently operating. In the context of this intervention, this is important since numbers of stations have grown by around one third since 2004. It is notable that the key growth area is in rural areas, the key project group for the project. In addition, the rate of growth is spurred by increased advertising revenues (see below). Due to issues of distribution of print matter (e.g. newspapers) and price entry points for other media, both newspapers and television coverage, whilst growing, largely remain rooted to urban and peri urban areas. Radio, therefore, remains the dominant source of information in rural environments.

There are moves toward rationalization of the radio market, whose ownership, particularly in rural areas is usually limited to individual business or political interests. However, the recent acquisition of Radio West by the Vision Media Group indicates the direction of the market. Formats vary, with wide ranging performance, from stations which are orientated towards cost minimization (low cost formats such as music and Kampala copy cat content) to the emergence of strong rural radio brands. Radio penetration is close to 100% of the population with Steadman group indicating weekly radio reach at beyond 92%.

Critical Success Factors

An enabling media environment: The existence of a liberalized (and commercial) media environment is critical for stakeholders to be able to identify the needs of their audiences, be able to access content solutions and report effectively on issues of concern to audiences.

Strong market understanding: Appreciating the way in which the business system operates enabled the SEMA project to clearly chart the constraints and the opportunities. This ensured minimal wastage of time and resources and contributed to project credibility amongst stakeholders. Being able to understand market dynamics, such as the relationships between advertisers, their agents and media, or the accepted precepts amongst institutions or audience tastes, is essential to diagnosing real issues affecting the market. This demanded extensive local knowledge within the project team.

Advertising Profile

The sustained economic growth within the Ugandan economy is reflected in commensurate growth in advertising investment. The advertising market is estimated to be worth US\$110 million. This represents growth of 100% since 2006, and 50% growth over the last year. Radio comprises 61% of total advertising share (although this has seen a 12% drop in share since 2005 largely to increased television revenues). The growth of advertising revenues is largely attributable to the growth of mobile telephony related advertising investment with around US\$30 million accounted for by the major players.

Critical Success Factor

A robust advertising industry: Commercial and competitive interaction in the industry is required.

Learning Point

Advertising investment is linked to mobile phone expansion: The explosion in advertising growth in Uganda mirrors the strong expansion of mobile phone networks that now comprise four of the top five highest spending advertisers. This serves as a key stimulant for the growth of rural radio stations, with increased advertising investment by mobile telecoms into the sector.

Policy Environment

The Ugandan media market was liberalized in 1993, although there was at the time no planned framework for licensing and management of the industry. Subsequently the Electronic Media Act in 1999 provided for the Broadcasting Council to manage new applicants. However, in the absence of a robust framework, industry growth has largely been based on first come-first served, with the rapid entry of investors from the business sector and/or from politically connected interests. This presents a challenge for the further growth of the industry in terms of quality and range, since many media owners have previously little or no radio specific experience.

In terms of industry regulation, a new draft Broadcasting Policy is currently before Parliament. This seeks to provide for a more mature regulatory system and to provide for quality benchmarks for the sector. This includes the ring fencing of content designed to encourage social and economic development. The policy has not yet passed its reading but contains elements such as non profit broadcasting and potential limitations on the scope of content and as such has the potential to have profound impact on the wider media environment. This was largely prepared outside the consultation of industry bodies such as the National Association of Broadcasters and the Ugandan Journalists Association.

Learning Points

Policy impacts greatly on media related interventions: Without journalists and producers having the legislative space to be able to investigate and report effectively, the opportunity of programming to sufficiently reflect audience need is limited, and thus the opportunity of content to create real impact is restricted.

The policy agenda is a long term and consistent issue for developing media markets: In the case of Uganda the political environment impacts on radio through a combination of local government monitoring and exercise of control at District level. This is coupled with distortion through the profile of ownership within the radio industry, most notably in the proportion of stations owned directly or indirectly through political interests.

Media/Audience Research

There is currently one major player in the Ugandan market, Steadman/Synovate. There are other market research companies, but Steadman is currently the only company undertaking regular commercial audience research. This takes the form of the annual Ugandan All Media and Product Survey (UAMPS) which samples the national population and conducts face to face interviews. Whilst the survey is the only source of media market related information, it is an area which has been subject to debate since its inception. A lack of analytical skills on the part of the recipients, coupled with questions over methodology and sampling techniques (especially within rural areas), means that although the survey remains the currency for advertising choice, it has been maligned by many in the media industry. There are plans to further develop the survey both in terms of regional research and research frequency. However, the key issue appears to continue to be the cost of research and who takes ownership or the risk and return. Plans are underway for the top advertisers to consolidate the research and provided for accelerated sources of funding. As yet, this has not yet been implemented.

Learning Point

Media surveys are for the whole market: The wider media industry, including advertisers, needs to see that the media survey is not something simply offered by the researcher but one to which they have a stake. It is important that the industry feel they should be more involved in the preparation of the survey. Given its importance, there ought to be separation between ownership and the logistics of compiling the survey. Perhaps ownership should be transferred to an independent body such as a trust which would contain representation of all stakeholders – media, advertisers and advertising agencies alike?

Desirable Success Factor

The presence of industry wide research: The presence of industry research is important in that it embeds the linkage between advertiser, media channel and audience. Without the offer of a survey in Uganda, there would be no accountability for media performance and thus the SEMA project may have had to start from further back with the introduction of the audience research concept. With research presence, the project was able to focus on improving the research portfolio.

3. PROJECT DESIGN ISSUES

This section defines the project principles, overall aims and the underlying causal model employed with reference to the different stakeholders. It explicitly comments on the key elements of the overall design of the project and looks in more detail at the role of the project and the specific project model employed. It defines the pre conditions necessary for successful replication and allows practitioners to comprehend the value proposition for the different project stakeholders.

3.1 Project Principles

The SEMA project's overall design has contributed towards its continuing success in Uganda. It was designed to contribute towards the Government of Uganda's Revised Poverty Eradication Action Plan (PEAP) 2004/5-2007/8 and has actively sought to accelerate the pace of achieving the Millennium Development Goals (MDG's). The project's core value has been to make markets work for the poor to reach large numbers of people by building on commercial dynamics to induce systemic change. In order to do so the project has successfully operated within the guiding principles for donor intervention in Business Development Services (BDS) of the committee of Donor agencies for Small Enterprise Development. Importantly the project has also been consistent with its donor's strategy (SIDA's "Making Markets Work for the Poor"⁷) strategy and emerging good practice in private sector development. SEMA's work is contextualized within the concepts of:

- Making markets work for the poor (MMW4P)
- Enhancing the BE
- Promoting the use of BDS

Critical Success Factors⁸

Pro poor focus: Target the poor through radio, the only media that reaches rural, remote and disadvantaged groups. Linking rural, marginalized and historically underserved groups into information channels and providing a voice for communities that lack representation.

Focus on developing markets: Develop media as a market system so that the poorest in society are included and served by this market. Working with a commercial industry, predominantly operated by the private sector, to identify and build on the overlaps between the commercial and developmental agendas.

Stimulate entrepreneurship and innovation: Build on and enhance the freedom of the media and of information to create a more information rich environment that can stimulate entrepreneurship and diversification in the private sector.

The key principles of the SEMA project have proved extremely important for guiding activities towards results:

Sustainability: is fundamental at all levels of the project. SEMA viewed itself as a short-term player in the media and radio markets and its role was to make this market work better for micro and small enterprises. The project must judge its own effectiveness on what it leaves behind, not on what it achieves during the life of the project. For the project, sustainability means much more than commercial viability and relates to various transactions and institutions in the media system.

⁷ Making Markets Work for the Poor – Challenges to Sida's support to private sector development, October 2003.

⁸ Concepts from the Project Document. Extension of the Small Enterprise Media in Africa (SEMA) Project in Uganda. ILO (2006).

Strengthening service markets: SEMA focused on making service markets work better for poor women and men. The project was based on a belief that service markets should be strengthened and enhanced and donor interventions should avoid undermining or bypassing existing or emerging service industries. The project also believed that fair competition between companies is positive and should be enhanced and encouraged.

The media as a driver of change: The project perceived the media as being a critically important driver of change and development. SEMA strengthened a vital platform upon which other PSD activities rely for information, consumer education, transparency, advocacy, stakeholder engagement and empowerment⁹. SEMA perceived itself as a temporary player that was enhancing and strengthening the media's potential role and ability to be a driver of change for private sector development. The project deliberately and explicitly avoided setting or driving the issues or media agenda. In a functioning media, audiences and local stakeholders determine the content while the media provides the platforms and channels to convey the views and information.

Desirable Success Factors¹⁰

Build a market that is inclusive of women and youth: Open up channels of business information and support to female entrepreneurs and young people - not only to empower women and the youth by providing a voice, but also provide inspiration through questioning of gender stereotypes and profiling female and youth role models.

Strengthen and empower civil society to improve governance: Build media as a voice for the voiceless and as a channel through which policy processes can be influenced and governance improved. Harnessing radio programmes to address the concerns and problems of small business women and men and farmers.

3.2 Project Aims¹¹

The overall development objective of the SEMA project is to contribute towards poverty reduction by building a conducive and equitable environment for entrepreneurship, small business survival and growth using the media. The overall SEMA intervention aimed:

- To increase the number and outreach of radio programmes specifically focussed on the MSE sector in Uganda.
- To improve business journalism and therefore the quality, relevance and value of information provided by the mass media to MSEs in Uganda.
- To expand the range of services and information that are being provided by radio to MSEs.

In the first phase the project identified that a critical constraint to SED was the lack of available time relevant information and that the conduits for information delivery were not operating in an optimal manner for beneficiaries. The original purpose of the SEMA project concentrated on business service delivery in which the project sought to maximize the potential of the radio industry in enhancing the flow of information to, from, and within the private sector in a sustainable manner for the benefit of the small businesses. Central to the project, it focused on capacity building the commercial mass media to provide business information, platforms for debate on business issues, a voice to influence policy processes and a channel for the delivery of business advisory services.

⁹ 'Review of FIT-SEMA Project, Uganda'. HITCHINS and PRAG (2005).

¹⁰ Concepts from the Project Document. Extension of the Small Enterprise Media in Africa (SEMA) Project in Uganda. ILO (2006).

¹¹ Much of this section has been taken from the ILO the 'Project Document. Extension of the Small Enterprise Media in Africa (SEMA) Project in Uganda'.

The SEMA project has taken an evolutionary journey from a pilot exercise with one station to an up-scaled programme working with numerous stations across Uganda and engaged other stakeholders in the industry. It has also sought replication both in the market and by other practitioners in other countries. Over the years the project evolved to respond to issues within the broader media industry and developed a systemic approach to ensure sustainability of both the radio programmes and the media market itself. In this regard it has broken new ground and helped to establish best practice in BDS and PSD.

The final phase intended to maximize the potential of the SEMA project to influence the way PSD integrates media into its work both in Uganda and internationally. This final extension of the project (06-08) sought to consolidate its successes and focus on exiting the market via the following activities:

- 1) Deepening the level of sustainability in existing small business radio programmes in Uganda.
- 2) Broadening coverage of small business radio programmes in Uganda.
- 3) Embedding the Making Development Newsworthy (MDN) agenda into the working practices of development organizations in Uganda.
- 4) Consolidating, documenting and disseminating learning under the SEMA project to specific stakeholders.

3.2 Project Stakeholders

The type stakeholders involved in the delivery of the SEMA project in Uganda and their expected roles is defined below:

The donor: intervenes to strengthen media's role as a driver of change and supports the growth of competitive, innovative and profitable media industries. The donor can also support the creation of an environment in which media can diversify and grow.

The business development practitioner: (or 'facilitator') implements systemic market development interventions aimed at opening and stimulating the media market to generate significant and expanding benefits for the rural poor. These interventions stimulate and indirectly capacitate all market players using subsidies only to demonstrate opportunities with a clear exit in mind.

The expert consultants: this is a pool of local private sector expertise contracted by the project in the short term to capacitate the radio stations to develop and market commercially sustainable interactive radio programmes. They also ensure enhanced involvement of, and, increased media awareness of content owners. They ensure increased media awareness amongst commercial sponsors and advertisers and media research companies. It is expected that their services will be provided commercially and independently in the long term but may be subsidized by the project in the short term in order to provide a dual role of both executing project activities and building awareness amongst future clients.

The radio stations: are the service providers who partner with the project and engage with the consultants to develop, market and broadcast profitable radio programmes that target and respond to the business issues of small businesses in rural enterprise sectors. They are supported by the project to ensure increasing listenership levels via relevant content and to sell commercial sponsorship and advertising opportunities for long term profitability.

The content owners: can be journalists, business associations, private companies, development agencies, local governments and listeners themselves who ensure an increase in the availability, accumulation, source and diversity of information for the media. They are capacitated to consistently improve the quality and flow of information provided. They partner with the stations to ensure the relevance, simplicity, accuracy and usability of information.

The advertisers and sponsors: ensure third party payment of the programmes. They partner with the stations to increase non-paid to air advertising spend on the programmes (without

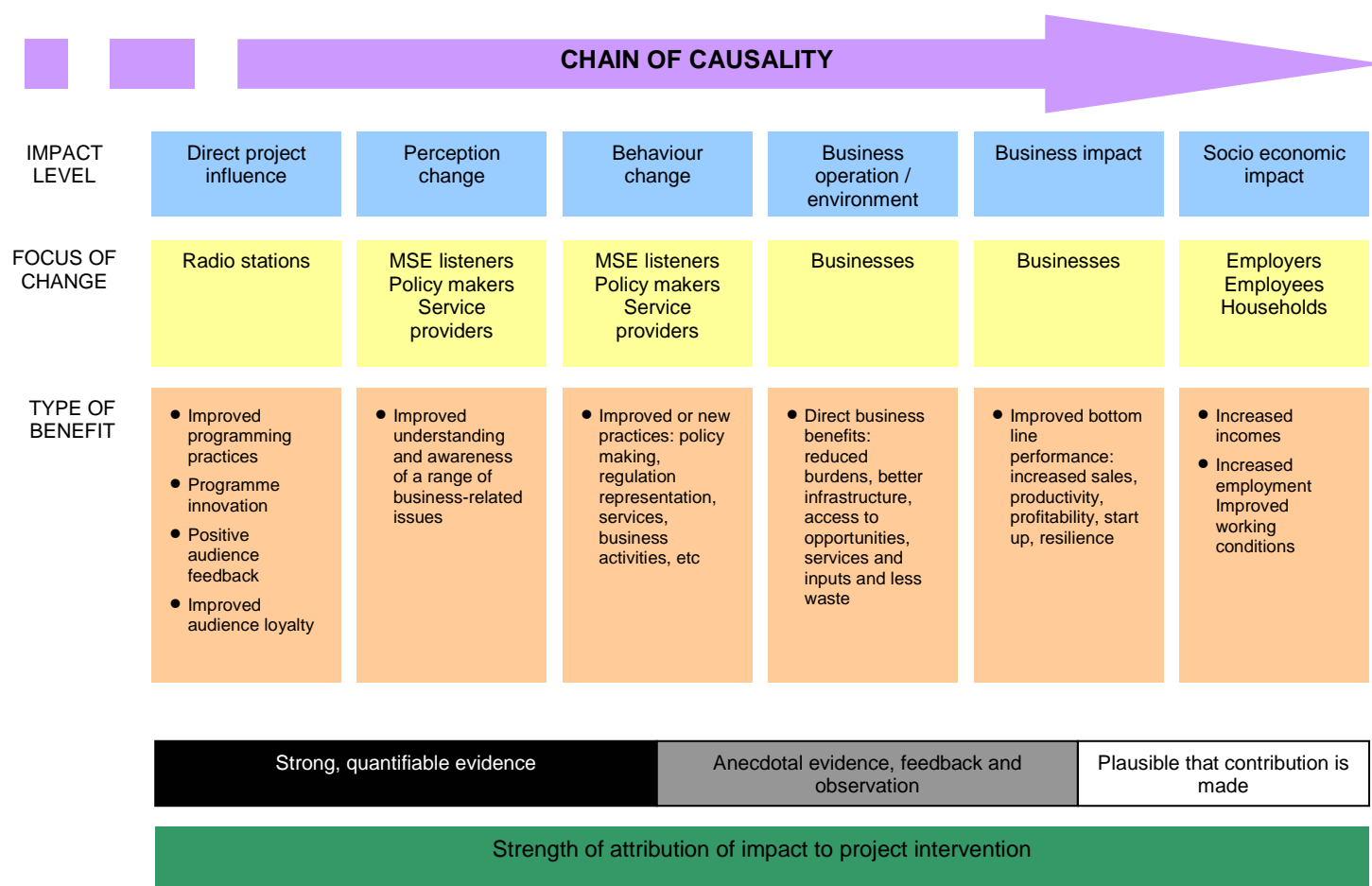
compromising the editorial line) in order to reach rural consumers and increase their own revenue due to related advertising spend.

The listeners: listen for free and in return interact with the radio programmes or engage in listener groups to drive demand led content. They directly benefit from the content of the programmes and employ new knowledge to improve their business practices.

The media research companies: deliver commercially sustainable demand driven research services to the media market. They monitor listenership and listener satisfaction of the programmes plus facilitate appropriate audience feedback. They partner with the project (and stations) to ensure the development, usage and commercialization of relevant and representative media research services - such as audience research, media ratings, content monitoring and listener assessments.

The media interest groups: advocate for and support fair media policy and regulation and policy makers ensure an enabling environment for the media sector.

3.3 Project Causal Chain¹²



The chain of causality highlights the role media plays in changing views and perceptions about business amongst business people and among policy makers and business service providers. It ensures that the business owner is the key target beneficiary. There is a large amount of evidence to suggest that the project has stimulated changes in behaviour which has positively

¹² Project Document. Extension of the Small Enterprise Media in Africa (SEMA) Project in Uganda. ILO (2006).
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benefited businesses across Uganda and in beneficial changes to the wider business environment. The challenge is in attributing these changes to specific programme content, since business people may consume other sources of information. In terms of job creation it is difficult to qualify the effect of the project. For other stakeholders there is evidence that there was positive value at each level, with radio stations in particular indicating that these programmes are essential to their output. For the consultants, several have enjoyed further commercial based work independently of SEMA.

Learning Point

Whole markets and their players must benefit: Each function and player exists in an interdependent market. As such sustainability is ramped on the basis that each player is clearly cognitive of their benefit. Without this there is a risk of a detrimental effect on the wider market.

Assure attribution: SEMA produced a series of case studies which trace attribution. They clearly demonstrate that the measured impacts resulted from the intervention, rather than from other interventions (perhaps by another agency), or from something completely different.

3.4 Project Research

The project design is cogniscent of the existing context and status of the media sector in Uganda. A sound understanding of the local context of the market, and the norms, conditions and incentives that influence behaviour was required. It is important to challenge the prevailing conceptions that are inherent in being an external party¹³. Market profiling was undertaken within the team, with project members undertaking desk research to profile the market. However, available market wide information was limited. The project was able to keep track of which radio stations were operating where, and fed these into a station performance matrix. Consumers were tracked using the audience survey and qualitatively through station level research. Sources of content were more limited, with the project restricting itself to building an understanding through discussion with stations and lateral contact through its project linkages.

Learning point

Implement a full market scan: Due to the evolutionary nature of the SEMA project it is only with hindsight that one can realise that scanning of the entire media market is required in order to adopt a systemic approach to project design. This involves looking at the broader market picture, identifying market players and their functions and exploring the influences - while also shaping a future vision of the desired market change. The sources of understanding can be varied and not just focused on formal research and studies. A scan could be done before a project is designed or implemented or can be undertaken during implementation. The SEMA project took a very responsive and incremental approach and undertook various assessments during the life of the project rather than at the onset. Such an approach is a testament to SEMA's success that allowed activities to be re informed from continuous learning.

3.5 Pre Conditions

Each new country or region will look different in regards to the diversity and competitiveness of the media industry in the private sector. Whether the sector is liberalised and for how long, plus the number of private investors and stations using which languages, are all issues in determining the important characteristics of the industry required for such a project. The level of competition and commercial interaction in the industry must also be taken into consideration.

¹³ 'Review of FIT-SEMA Project, Uganda'. HITCHINS and PRAG (2005).
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The ideal environment would be defined by liberalisation and competitiveness in the media environment including:

- Numerous stations broadcasting in a national and vernacular languages and using a variety of formats
- Emerging support functions for the media industry such as training and basic media research services
- A high population living outside urban areas
- Some importance of mass rural and poorer audience to the industry or specific stations (not just an urban focus)
- A demand for diverse content from listeners
- A robust advertising industry
- Emerging lobby and interest groups
- A suitable regulatory framework with evolving media policy and legislative developments that are media friendly
- Emerging democracy at local government levels to better ensure government's relevance to business and a localization of business environment issues

Critical Success Factors¹⁴

Know the context: The context is an integral component of the market system that the facilitator intends to enhance and encompasses a wide range of factors that include socio cultural norms, traditions, and expectations, standard business practices and procedures, political and regulatory environment and language.

Be evolutionary: Enable maturation of the project model with a clear understanding of the differing factors which can affect the effectiveness of project implementation. A key reason for SEMA's success is that the project started out with one radio station and through the success of that pilot initiative, the project had a champion to take to other stations. Without this the project would have struggled to find a strong entry point.

SEMA worked where there existed an evolving competitive radio industry that was placing value (to some degree) on low income audiences. Liberalisation of the sector was an important pre requisite for the project that was defined by private investors, numerous stations and a variety of languages. The advertising environment was also robust enough to offer opportunities for commercial activities. A basic level of competitiveness was a further crucial pre condition defined by increasing competition for advertising revenue, diversification of formats and programming plus some programme innovation and differentiation.

Often environments will not be consistent with this ideal scenario and 'right sizing'¹⁵ the solutions and the interventions that deliver them, will be a key challenge for practitioners seeking to replicate the SEMA project. Right sizing often entails re thinking the nature and scale of the solution and means of delivery. The key is to deal with what works and avoid pursuing ideals that can only work if propped up by donor resources.

Where these ideal conditions do not exist they may be stimulated by the programme and migratory models could be adapted for different environments. However permanent subsidies should be avoided or limited to a short duration with specific objectives, with projects beginning to use them for test marketing, capacity building, awareness raising, gathering consumer feedback and monitoring and evaluation. Using subsidies to develop markets rather than delivering services, involves having a clear vision of a sustainable market and an exit strategy. In a

¹⁴ Many of the CSF concepts are distilled from 'The Role of the Facilitator: Taking a Systems Perspective'. The SEEP Network. (2005).

¹⁵ Concept extracted from 'Review of FIT-SEMA Project, Uganda'. HITCHINS and PRAG (2005).
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sustainable market, usually competing suppliers offer a wide range of products; frequently innovate to meet changing demand; and capitalize on market opportunities. Sustainable markets should also grow in volume and offer increasing access to under-served groups.

3.6 Project Model

The project sought to take a light touch approach to market development. As such it aimed to work, where possible, through intermediaries. A key component of the project approach was to develop a systemic and inclusive system to identifying and implementing its activities.

The SEMA model evolved into an intervention that focused on “facilitating”¹⁶ the expansion of the market rather than “providing” services. It aimed to promote competition and efficiency in the market with a vision of a sustainable market. The model delivers value and is replicable and scaleable¹⁷.

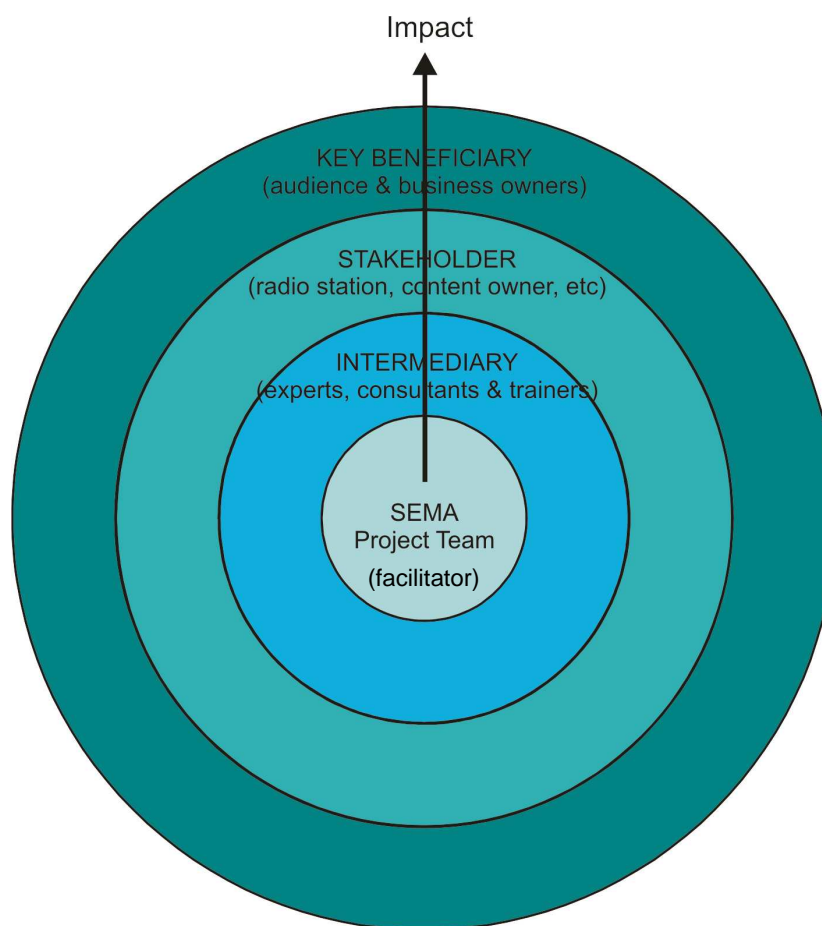
The project did not directly fund stakeholders either by way of paying for airtime or in providing equipment. Subsidies, such as payments to consultants have been limited to a short duration so as not to distort the market, and were provided for purposes of demonstration only. For example, in order to develop the independent support functions, the project would fund the development of independent consultants and subsequently provide them with their first contracts with radio stations. The intention was to stimulate market demand. In this case, stations would see the value associated with investment into supporting consultants and subsequently offer consultants repeat contracts. It has further worked to develop linkages and partnerships among market players for mutual benefit. Assuming that all market players had access to SEMA's facilitation, this would allow the market to qualify value and thus choose the best suppliers.

The approach also sought to promote market principles and local ownership by encouraging stations and other stakeholders to invest their own resources. Stakeholders would choose to work with the programme in the same way they make other investment decisions by weighing costs and benefits. Ultimately, they are then more likely to feel ownership and to use programme resources wisely.

The diagram below demonstrates the overall approach:

¹⁶ A facilitator is an International or local institutions usually funded by governments or donors that aim to expand and improve one or more particular markets for the benefit of specific target groups.

¹⁷ Many of the concepts are distilled from the Seminar Reader – ‘Developing Commercial markets for BDS’, MIEHLBRADT and MCVAY (2003) and ‘The Guiding Principles for Donor Intervention’. 2001 Edition. Prepared by the Committee of Donor Agencies for Small Enterprise Development.



The facilitator's role includes:

- To encourage individuals and firms to supply services to MSEs and promote transactions between MSEs and suppliers
- To partner with the private sector and support the development and expansion of a vibrant, competitive BDS market
- To remain external to the market and not be too visible
- To promote competition among suppliers by working with many of them and promote efficiency in the market
- To promote cost sharing with private sector partners and use subsidies to demonstrate opportunities not to distort markets
- To be flexible and responsive to the market
- To concentrate on indirect interventions to stimulate markets
- To have a clear vision of a sustainable market and a defined exit strategy
- To disappear as the market develops as their role is temporary
- To coordinate efforts with other development agencies

Critical Success Factors¹⁸

Define an exit strategy upfront: The facilitator's role is temporary and the market must be sustainable when facilitation activities end. Certain facilitation activities need to continue on a commercial basis - SEMA prepared for this by training providers to conduct activities such as media training themselves.

Build local capacity and ownership: The SEMA model focuses on building the required capacity in the market to sustain improvements over time without continued support.

¹⁸ Many of the CSF concepts are distilled from the Seminar Reader – 'Developing Commercial markets for BDS'. MIEHLBRADT and MCVAY (2003).
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Implement limited and focused interventions: Because any intervention will change the market, limited and focused interventions are more likely to address a market issue with minimal distortion. Focus on areas of high leverage with focused actions at the right time and in the right place to ensure significant results.

Be responsive: Allow the project to be flexible and responsive to the market - a flexible, entrepreneurial approach works better for market development programme than the traditional steps that developed set objectives and indicators and lead to the achievement of programme outputs. Markets can change rapidly and often react to the facilitators' efforts in unexpected ways. Facilitators must be free to respond to the market, taking advantage of opportunities and changing strategies as appropriate.

3.7 Business Models

The SEMA project has worked to strengthen the media industry to provide business support in a sustainable and commercially viable way. The business model specifically promotes non-paid to air programming. Unlike traditional enterprise development activities with the media, the SEMA project does not buy or 'sponsor' programmes or newspaper space and avoids providing financial support to media companies to cover development issues.

SEMA focuses on sustainability at all levels by ensuring that a clear and credible offer¹⁹ is made to the market players in terms of the potential value added by engagement with the facilitator and the intervention. A clear understanding of the incentives on offer is the key to success of the business models adopted:

In terms of incentives, the business model reflects valuable incentives for each stakeholder level:

Radio stations: can expect that with improved application of knowledge gained from the project this will result in improved programming. This, in turn, will attract increased listenership and a stronger relationship with those listeners. This is both within the programme (s) and across the station. In addition, this attracts increased advertising investment and resilience by way of longer and repeat contracts. This has further added benefit by way of staff motivation and retention.

The expert consultants: with increased appreciation of value at station level, consultants can expect increased demand for their services, thus stimulating an expanded market which is sustainable in the long term.

The content owners: the key need of the content owner is enhanced with both improved access to mass media in a fashion which removes the limitations on funding coupled with increased appreciation of the value of content. This offers providers with the opportunity of wider and increased impact.

The advertisers and commercial sponsors: advertisers look for increased impact of their messages. Improved programme quality gives them the chance of reaching more of their target consumers and a better opportunity of sell through of their messages. In addition, advertisers have the opportunity of stronger engagement with media companies, improved knowledge of media, thus adding value to their marketing strategies.

The media research companies: greater awareness of the need for a strong research component coupled with the ability of the researcher to improve its service offerings provides them with the opportunity of developing its products to better reflect market need. This in turn gives them the chance of improved credibility and the capability of attracting new customers for their services.

¹⁹ Concept extracted from 'Review of FIT-SEMA Project, Uganda'. HITCHINS and PRAG (2005).
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Media interest groups and policy makers: Increased lobbying and support for policy reform can lead to improved policy making, regulation, representation and translate into direct benefits to the business community. For interested groups, the project provides an opportunity for policy makers to understand the importance of a progressive policy agenda and one which is congruent with the needs of their citizens.

Critical Success Factors

Do not play a direct role in the market: The facilitator has a development agenda whose role is to support service delivery by developing a vibrant, competitive market. Facilitators should disappear as the market develops and suppliers or other permanent market actors take over its functions. In contrast, the supplier is a commercially oriented market player whose role is to offer services. In the case of the SEMA project, the service provider is the radio station, research organisation or media trainer and the service is the radio programme content, research services or training programmes. It is important that the facilitator does not undermine private suppliers and directly provide the services - however a facilitator may test market a service or aim to demonstrate the commercial viability of a service by providing it for a limited period with a clear exit strategy.

Adopt a business like approach: Projects must be business like and demand led, be sustainable, be focused, maximise outreach and acknowledge who can do what best. This approach has a number of advantages - it requires investment from partners meaning that the financial scale of the initiative will generally fit the capacity of the market - the approach attaches a value to support and business-like relationships foster business-like incentives, behaviour and attitudes - it is also possible to link support to suppliers' achievement of agreed upon objectives – and it further builds ownership without being overwhelmed by external funds and advice.

4. PROJECT IMPLEMENTATION ISSUES

This section comments on establishing and driving project partnerships and allows practitioners to understand the overriding considerations that must be taken into account when implementing a similar project in another country. It includes comments on the evolution of the SEMA project, the time frame of the intervention, management and supervision style, team make-up, monitoring and evaluation components and budgetary considerations. It also details the key approaches and practices adopted by the project.

4.1 Key Milestones

The key points of SEMA engagement may be defined as follows:

Partner engagement: SEMA was proactive in its approach to radio partners. This included the 'selling in' of the concept and the driving of the engagement process.

Service/product development: the stations were encouraged to own the development process. Together with capacity building activities facilitated by SEMA, stations would develop a project launch team which would comprise representatives from each key department; programming, production, sales and marketing. This would form into a Product Development Committee (which SEMA aimed to embed for all other programming development). Together with consultants, the team would work up a pilot format as an output to training, either through capacity building of the production function or in the undertaking of audience research. The choice of broadcast slot was agreed between SEMA and the station and was informed by results of later pilot testing. Content provision at this level was driven entirely through the station. SEMA facilitated content providers were plugged into programming after launch of the service.

Pilot service testing/demonstration and revision: pilot programmes were field tested amongst potential listeners, and in some cases community groups. Comments on programmes were noted and programmes revised for; content, format, presentation style and scheduling.

Launch and marketing services: the stations themselves were responsible for the marketing of the programmes. SEMA's role was in suggesting methods to market the formats. The stations were free to choose their own level of investment in marketing activities.

Monitoring the service: programme and audience monitoring was undertaken at two levels; through periodic audience research which stations usually undertook as part of research capacity building. Secondly via content monitoring purchased from Steadman by the stations, which helped to identify; content broadcast identified from on air feedback, gender contribution, type and range of content, etc.

Service sustainability: as regards advertisers, unlike the pilot, SEMA directed the sales effort through the station sales teams, both in Kampala and in station. This took the form of capacity building teams to better sell programming and thus attract revenues.

4.2 Comments on Partner Selection and Engagement

Radio Stations

Within both project phases, it was the project team which drove the selection and assessment of partners. This was achieved through initially the NPC and latterly one of the project officers. This involved; contacting radio stations, organising presentations to senior management/station owners followed by a station assessment. Assuming that the station and the project were in agreement to move forward, the project team would agree, informally the process to launching or further embedding radio formats. This included the relevant training components. There was a

format for a written memorandum between SEMA and the stations. However, it is not clear that this was widely adopted. There is evidence of an audit trail provided by letters and e-mails.

The project worked with commercial radio stations. For the purposes of this project a core element was commercial sustainability. So whether a station was publicly owned, community focused or exclusively commercial, this was not a pertinent question. The nature of ownership does present unique issues but the type of station did not affect a station's involvement. The selection of partners instead was primarily based on their ability to commit time, resources and partner investment. This was coupled with their perception of expected value to be delivered by SEMA. This is in terms of both growing audiences and in acquiring additional commercial revenue. The focus of the project did change mid flow. To some extent this was motivated by limited resources and implementation time in 2007 – 2008. Initially the project intended to increase the numbers of stations beyond the thirty three from the previous phase. However, it was decided at the beginning of 2007 to scale this back to fourteen regional 'champions'. This enabled the project to work more closely and further mature the project model.

Learning Points²⁰

Station 'buy in' is imperative: SEMA approached stations directly to sell the project concept and was the driver of the intervention, rather than ensuring adequate buy in and station ownership. In the case of Mega FM in Gulu, it was felt that the initial presentations over sold the potential for commercial revenues, although audience impact proved strong. This also runs the risk of the radio stations becoming over dependant on SEMA and its core activities, especially training and therefore risks long term sustainability after project close out.

Management commitment is important: Weaknesses within the management of a commercial radio station can potentially undermine business programming in terms of both their quality and continuation. Poor management structures and an unwillingness to invest in programming and staff are a threat to quality developmental programming; particularly programming that involves journalists undertaking research and investigative journalism.

Openness to change is essential: Radio owners and managers often model rural stations on urban, English-language format stations. Stations must acknowledge the demand for locally relevant, informative and developmental content and be prepared to experiment and innovate. A station must also recognize the opportunity for its own development and the need to embrace change throughout its organization.

Critical Success Factor

Assure congruence: Partnerships between the radio stations and the project worked best when there was a clear strategic fit between the station's desire to develop its programming and the opportunities offered by the project. This ensures that the station is more willing to commit its resources to ensuring success of the programmes.

Consultants

One of the critical success factors of the project was to build a base of core consultants. The process was either directed through personal contact or, in the case of expanding the pool of independent editorial consultants, through public advertising. Subsequently, consultants would be offered entry contracts across one activity area, and, assuming this was successful consultants would be offered repeat project contracts. It was noted by the review team that in 2006, 70% of contracts were awarded as sub contracts to named organizations, which seems out of balance with the stated objective of market development. This was however, redressed in the second half of the project period.

²⁰ Excerpts from 'Project Document. Extension of the Small Enterprise Media in Africa (SEMA) Project in Uganda. ILO (2006).

Learning Points

Map the market: As regards the opportunity for private consultancy - no market mapping was undertaken in terms of preparedness of stations to pay for services, how often and at what rate. This increased the risk on the part of consultants, many of whom were employed during the course of this project. The result was that a number of project consultants were employed by the project rather than remaining independent.

Be inclusive: By adopting an inclusive relationship with consultants the project was capable of involving consultants in the drafting of activities and populating of Terms of Reference – this provided stakeholders the opportunity of owning the process.

Critical Success Factor

Ensure ownership: There must be clear evidence of either an existing market for independent consultants or failing this, a commitment by suitably qualified individuals to acquire the skills necessary to offering these services.

Content Providers

It is not clear that there was a planned approach to bringing in content providers. Under the MDN pillar, the project, through lateral contacts with other development agents and in consultation with radio stations, sought to identify development agents who were already using radio or intended to use radio to disseminate information. ILO-SEMA acted as the broker between the development agent and station. The project did not have written agreements with content providers but the relationships were guided by partnership agreements between SEMA and the stations. Written contracts were signed between the stations and content providers. This was required due to the financial element (airtime payment) of these agreements. Typically, this would include station commitment to; amount of time, when, frequency and any additional information, such as the content provider budget to underwrite production costs and any station commitment to additional bonus airtime. Other content providers beyond principal airtime facilitators (such as other development agents and government) were brought into the project either through the project in consultation with the stations or through the principal provider.

Learning Points

Map the market: No market mapping was undertaken regarding which content providers were active, or potentially active, in the market. This meant that the project largely worked with providers who had existing media business models. The project sought to introduce MDN as a more effective way of delivering this information and demonstrating to the stations their ownership of content development is critical to sustainability.

Embed components in the market: The project document specified that the project would seek to embed the MDN curriculum through educational institutions. This was found to be difficult within the project period since it had not qualified value to those institutions. Instead the activity was amended to demonstrate value through content provider – radio station linkages. Subsequently this process could then be documented and disseminated to a broader audience for later adoption.

Critical Success Factor

Commitment of radio stations: Radio stations must appreciate that content owners add significant value to their programming. The engagement of content providers depends on this perceived value. There must be acceptance that changing the business model by dropping existing practices such as paying for airtime is a long term goal.

Other Service Providers

Again, the project sourced, assessed and engaged other providers on a closed source basis. For example, under the area of policy development, it was felt by the team that most of the existing industry institutions were weak, as in the case of the National Association of Broadcasters (NABS). The project identified the Uganda Media Development Fund (UMDF) who already had institutional knowledge of policy issues and networks amongst policy makers. Due to the fact that the ILO could not be seen to be directly influencing the policy agenda, it engaged UMDF to sustain lobbying and influence. UMDF were directly contracted as consultants.

Critical Success Factors²¹ - Applicable to all project stakeholders:

Need for stakeholder demand: The danger of market engagement, especially in an environment characterized by low commercial revenues, is that radio stations tend toward looking at revenues before audiences. In a developing media market, the effect of chasing revenues is potentially to ignore the lifeblood of the station, the listener. For these programmes to be successful the station must take ownership and by proxy aim to pass ownership to its audience. This requires that senior management and owners must appreciate the value of their audience and that the SEMA approach is capable of providing an audience solution. This explains the appreciated value of SEMA training, which was the first of its type in Uganda. Those stations which fared best from the project were those whose business objectives were congruent with the solutions offered by the project. This demands that the partner selection process be rigorous and that the modelling process be highly consultative.

Develop a clear offer: Describe what the project is bringing to the situation that will support the development of a sustainable system. Determining what benefits can be expected by each player and stating the role of the facilitator in a clear manner are all part of “developing an offer.”

Manage expectations and establish credibility: It is critical to communicate the vision of the desired market and the part the facilitator will play in achieving this. Managing expectations helps the facilitating organization establish its credibility. SEMA developed the credibility to make an ‘offer’ beyond the provision of financial assistance through patience and persistence, creative approaches and an understanding of the context²².

4.1 Project Timeline

The non financial approach of the SEMA project meant it was time consuming and labour intensive which had implications in relation to project duration and measurement of progress. The SEMA 3 year extension ran from 2006 to 2008 and built on activities initiated in 1999 and a two year phase from 2004 to late 2005. An approach dependant on the commitment and initiative of the private sector, without financial inducements, is challenged to adhere to strict time frames, targets and reporting mechanisms. In terms of replicating the initiative it would be prudent to think in phases allowing time for effective engagement:

SEMA Project Implementation Period		
1999 - 2003	2004 - 2005	2006 - 2009
Pilot	Up scaling	Consolidation

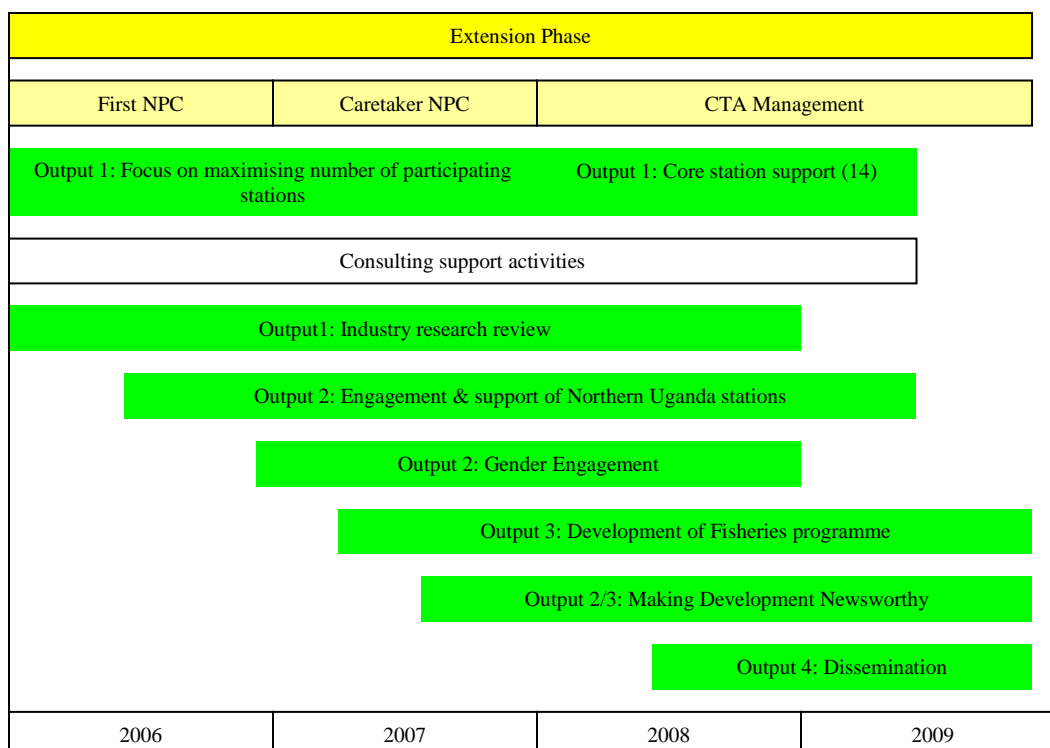
²¹ Many of the CSF concepts are distilled from ‘The Role of the Facilitator: Taking a Systems Perspective’. The SEEP Network. (2005).

²² ‘Review of FIT-SEMA Project, Uganda’. HITCHINS and PRAG (2005).

A pilot phase involved partnering with one station to demonstrate the business opportunity to the wider market. It piloted approaches for facilitating content, revenue, support services and policy dialogue. SEMA worked with the Central Broadcasting Service (CBS) to develop models and approaches, such as facilitating sponsorship (SEMA secured sponsorship at this stage) and motivating content, before using this case to demonstrate benefits to more players. This allowed the project to learn and develop credibility while limiting failures.

A phase of up-scaling involved dialoguing with a broader market, facilitating vernacular programming with numerous stations in differing locations with differing target listeners. SEMA scaled up to facilitate technical assistance to new stations especially in rural areas. They further broadened and deepened their focus to strengthen benefits to women entrepreneurs, rural entrepreneurs both in non-farm and farm enterprises, internally displaced people (IDPs) in the camps of Uganda's Northern conflict area, entrepreneurs operating businesses in Uganda's Northern conflict area and fishing communities. This phase also involved embedding business programming within the industry and ensuring sustainability of the programmes in terms of investment and content. SEMA supported the training of stations in terms of production and the training of content owners. Testing and piloting continued to try out new models and approaches. It linked stations to advertisers and capacitated the sales and marketing departments of the stations. It also consolidated work with other supporting functions such as training, media research and the enabling environment. It also facilitated the commercialisation of those services including training trainers to deliver appropriate services. It further demonstrated advertising and commercial media research opportunities and facilitated a media interest group to support policy formulation.

The final phase focused on replication involving consolidating or deepening work with the market functions and players to ensure commercial service sustainability; broadening coverage even further in order to embed business related programming more firmly in the media market, and promoting replication by both the market and other practitioners via the documentation and dissemination of key learning. The following diagram indicated key dates within the project extension since 2006. It is designed to provide an indication of critical activity points which informed project progress.



Learning Point

Evolve and take stock: The project evolved over a period of nine years. At the outset it was a business services delivery project that evolved into a market development project but without a reworking of the core deliverables.

Critical Success Factor

Market systems projects need time - A key element in the success of SEMA has been the fact that it has run for a number of years, allowing it to match its pace and duration to the task at hand. Often projects fail because they are never allowed to mature to the stage where they begin to effectively deliver.

4.3 Project Evolution²³

The SEMA project has taken an evolutionary journey and was given the time and space to evolve and mature. It evolved from being focused on business service delivery into a project that sought development of the overall market system. It continued, rather than to simply seek to strengthen the previous model, to demonstrate and pilot concepts and activities. The project continued to push the boundaries of private sector development by seeking to strengthen the things which worked and exploring new methods and ways of doing things plus contrasting and comparing its approaches. The project ensured that the approaches that did work were adopted and embedded by the market as good business practice and recognised that it was critical to disseminate learning and promote best practice.

The market development approach focuses on addressing the constraints to market development for the whole media market. It employs a macro view focusing on systemic market change via strengthening of the competitiveness of the private sector and stimulating the market to replicate promising practices on a sustainable basis. Systemic projects engage the private sector in devising and developing viable businesses and market models that are likely to be copied and to take off in the wider market.

SEMA has engaged at the various levels of the media market in Uganda to make the whole market work better and continually deliver value to MSEs. It has worked to strengthen specific parts of this system and to mitigate the constraints within other areas:

- Stimulating the start up and improvement of radio programming focussed on small business issues.
- Enhancing the flow of business information to the Ugandan mass media.
- Enhancing services provided to the Ugandan radio industry.
- Media research and its effects on advertising and programme content.
- Government legislative plans and their potential influence on the radio industry.
- The role of content owners on the flow of information.

The SEMA project ultimately expected an outreach and penetration with more and more stations and business programmes reaching more and more target listeners in more regions. This has resulted in a high-quality, diverse, competitive market for such radio programming and the advertising opportunities it affords.

²³ The following concepts and comments are distilled from 'A Systems Approach to Value Chain Development'. BEAR (2007) and the Seminar Reader (2006) - Implementing Sustainable Private Sector Development: Striving for Tangible Results for the Poor. ILO.

SEMA has expected an even broad market response - wider system change and stimulation of more market players to perform valid roles that they were either not currently doing or not doing well. Not just changes within the radio stations but also changes among content owners and investors: plus changes among media researchers and policy influencers and makers which resulted in an improved media research environment and supportive business environment. The success of the project is such that it leaves an expanding, resilient and responsive media market that channels benefits to the poor²⁴.

Desirable Success Factor²⁵

Coordinate efforts: Effectiveness will be compromised in the long term if one donor pursues a market development approach and others continue to subsidize transactions and services in the same market. It is important to advocate for market development as free services dampen stakeholders willingness to cost share and take ownership. Coordination is critical between donor funded interventions that choose to work with the same suppliers in the same market. Suppliers can be overloaded or lose their commercial focus if they receive significant financial resources from several donors.

4.4 Management and Project Team Supervision

Much of SEMA's achievement can be attributed to the adoption an incremental, non prescriptive and participatory approach that allowed strategic ways forward to emerge from market tests, lessons learnt and business partnerships entered into. One of the most important elements contributing to SEMA's strength has been the degree of flexibility, responsiveness and innovation that has been allowed in operation of the management team. SEMA has learnt through engagement, in dialogue and via pilot initiatives. The management approach can be summarized as follows:

- The controlled use of "light-touch" facilitation
- A strong element of managerial continuity
- Stability in terms of continuous mentoring and technical advice
- Strong, clear vision and flexible implementation

The project has challenged conventional formal project identification, design and implementation. It has sensitively evolved by re-structuring, shifting focus and refining operations in response to the market. Much of what the project has achieved is due to the fact that it has not been subject to rigid, mechanistic structures and pressure to achieve quick results²⁶.

Critical to SEMA's success is having the right project team with the ability to operate across different cultures; that of the development field and that of the local environment. The project required individuals with flexibility and creativity; with knowledge of the private sector, "Making Markets Work" thinking and approaches as well as an understanding of media. It is further critical that the project manager be a BDS/PSD expert. It is through the project manager that the project vision was communicated to both the project team and its external consultants. This ensured that the project always maintained focus on the key beneficiaries.

Learning Points

Enlist champions: An element of SEMA's success may be attributed to the champions that have pushed its agenda and, to some extent, the strategies and technical support afforded it by the ILO and its donors. Such projects that adopt a low profile and lead to slower immediate

²⁴ Concepts from the Seminar Reader (2006) informed by the work of the Springfield Centre.

²⁵ Many of the CSF concepts are distilled from the Seminar Reader – 'Developing Commercial markets for BDS'. MIEHLBRADT and MCVAY (2003).

²⁶ 'Review of FIT-SEMA Project, Uganda'. HITCHINS and PRAG (2005).
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results require 'champions'.

Contract external technical missions – SEMA involved their champions and project manager from the first phase to offer continuous guidance and support during the extension ensuring project continuity.

Critical Success Factors²⁷

Be adaptive, flexible and responsive - The SEMA project took a very responsive and incremental approach and undertook various assessments during the life of the project rather than at the onset. Such an approach is a testament to SEMA's success that allowed activities to be re informed from continuous learning.

Team Balance: The project was highly human resource dependent. As a market development project, the skill set of that team was critical. At managerial level it is essential to have strong BDS/PSD grounding, with a need for media strategy and core journalistic skills in support.

Buy in expertise: The effectiveness of the team was accelerated through its ability to crowd in the right core consulting group to provide off the shelf technical support, and involving them in the drafting of terms of reference as well as working up specific activities. This provided for greater creativity which individual problems demanded.

4.5 Observations on Monitoring and Evaluation

The monitoring and evaluation framework does not indicate the intended effect on beneficiaries. However, during the course of the review the team noted the strength of change engendered by small business radio programmes and their popularity amongst listeners, as has also been noted in previous reviews. The team notes that whilst there is no specific benchmark of audience performance, the inference is that if radio stations are continuing to commit to running these programmes, then they have value to the station, and by extension to their audience. Likewise, under the research training component, each station undertook qualitative research activities as a training output. On average, total small business programme satisfaction levels exceed 90%, indicating the appeal of these programmes.

Key monitoring and evaluation tools included:

- *Technical mission reports:* An informative review of the SEMA project re informed activities and made recommendations for the final phase.
- *Listener groups:* As an output of station audience research capacity building, listeners were interviewed by station staff to obtain direct qualitative feedback. A group of dedicated listeners agreed to listen to the programme and volunteer their comments and suggestions regarding format and content. SEMA has actively supported listener forums to inform stations understanding and highlighted the need for stations to invest in research.
- *Content monitoring:* Content monitoring services offered a solid source of background information for producers and researchers. The researcher monitors the radio transmissions of many stations ostensibly for the verification of advertising broadcasts. The SEMA supported stations purchased the wider reporting of business related content. This included; number of business stories and content of stories, editorial position of content and feedback to business radio programmes. Content monitoring is able to inform stations of gaps in their output and support the training team with identifying key areas for attention. It helped to identify key elements for capacity building activities and to provide an understanding of specific areas of content value on the programmes.

²⁷ Many of the CSF concepts are distilled from the Seminar Reader – 'Developing Commercial markets for BDS'. MIEHLBRADT and MCVAY (2003).

- *Content analysis:* Content analysis services were accessed by SEMA as an M&E tool to monitor the performance of the programmes. This included: number of and share of business programmes per station, consistence, programme length and schedule, programme type distribution and trend (field, studio or mix), programme format distribution and trend (Commentary, magazine, feature, interview and talk show), audience participation (male/female) by month and station, guest analysis by gender, general topic performance, programmes under broad themes, share of themes and sponsorship review. SEMA actively trained Steadman to undertake monthly collection and bi-annual delivery of this service.
- *Advertising tracking:* Industry advertising spend reports provided media partners with a valuable benchmark to monitoring revenue performance and as a source of new potential revenues.
- *Listenership ratings:* Media ratings provided specific stations with an analysis of the audience tastes of individual media channels. Media companies were able to assess their performance over time via audience trends and numbers. Ratings also provide an overview of how many people have the opportunity of hearing an advert or sponsorship message which is often translated into a measure of awareness. SEMA loaded questions on the National ratings and purchased the ratings to assist with project monitoring activities. SEMA has actively lobbied for better more appropriate audience research with a broader rural sample and explored ways for stations to jointly fund audience research. SEMA has also actively demonstrated the relevance of media research and how to market their audiences to advertisers and not the other way around.

Learning Point

Establish baseline information: Scope out case studies and information at different levels of the market system prior to project start. This makes it easier to extrapolate potential positive economic impact at business level and demonstrate impact at other levels of the market.

4.6 Comments on Budget and Cost Benefit²⁸

This type of project is difficult to evaluate from the perspective of cost benefit, given that this is no way of being able to ascertain the effect of facilitated programming on the wider market. Cost effectiveness has previously been measured by the value of the airtime devoted to business programming which is then compared to total project cost. However, this is difficult for two reasons:

- Given the variation of costs between stations, it is difficult to predict this figure accurately. Further it does not take account of additional programming not directly facilitated by the project, but rather influenced by it.
- It is unlikely that a development agency would have purchased this quantity of airtime and as such it makes comparison unrealistic.

This is also only indicative since it takes no account of the impact of business radio programmes on the beneficiary, so there are no effective value measures as regards real behavioural or environmental change. Having said that, there are now well over sixty hours a week of dedicated small business programmes in close to twenty vernacular languages. Such a project does not require less financial resources than conventional media-related interventions – the difference is that the approach is more effective. Purchasing airtime can rapidly achieve comparable levels of exposure but programming ceases when financial support stops.

For purposes of replication, this type of project is human resource intensive. Given that SEMA did not support directly either airtime costs or any ancillary equipment purchases, its core expenditure was into providing the pertinent human resource skills to drive its activities. As such, both the core project team and the engaged consultants were the drivers of its activities. As a

²⁸ With some excerpts from the 'Review of FIT-SEMA Project, Uganda'. HITCHINS and PRAG (2005).
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result, 75% of all project costs related specifically to either personnel fees or costs incurred from the implementation of their activities. This included both local and international mission costs. The logistics costs of training were minimized on the basis that stations were largely responsible for meeting these costs. Within this, 25% of project costs were directly related to project team fees. This is to be expected given the level of skills which existed within the team, who were all engaged full time across the project. In comparison, 31% of project costs were devoted to external consultants. This represents average growth of 30% year on year throughout the project period. This is explainable by a combination of increased project activities, especially at the back end of the project.

In terms of counterpart funding, anecdotal evidence from partner radio stations indicates that their contribution to capacity building costs was between 30% and 40% of total cost. This was devoted to the payment of logistics costs associated with capacity building which included; accommodation, training facilities, reproduction of resource material and transportation. In total, SEMA contributed less than 5% of total budget to training costs. This is largely attributable to non in-station capacity building such as the payment of project workshops.

Learning Points

Standardise rates: It is difficult to qualify level of value associated with individual consultants, since there was no standardisation of rates until 2008.

Accept the costs of learning: This type of project tries out new concepts and pilots activities. So there must be acceptance on the part of the donor that some contracts may not deliver their expected value

Benefits are delivered after completion: It is fundamental that there are a large number of intangible benefits associated with the choice of working to develop the market system. Many of these benefits will be observable in the long term as the market seeks to adopt those elements which work for them. Hence, a large proportion of value will be generated beyond the end of the project period.

Recognise staff expertise: Agencies tend to record staff time under management budget headings and assess efficiency by measuring the proportion of management costs to overall expenditure. When staffs are to be harnessed as expertise on human-resource intensive project, and not just as administrators or managers, then labour costs must be accurately presented and explained to better reflect the requirements of the project approach²⁹.

Critical Success Factors

Scope out the consultancy market: It is imperative to profile the independent consulting market in order to assess; availability of required skills, levels of experience and expected remuneration. Having achieved this it is desirable from the point of view of team motivation to build a reward system based on merit and commensurate experience and qualifications.

Budgetary independence: Project managers must be given the flexibility for amending budget lines as the project evolves. Whilst it is important for the donor to provide procurement guidelines for contracts, the project manager must be in a position to be able to make budget decisions which reflect the market responsiveness of the project.

Veracity of audit trail: Assure good project governance and ensure that project budgets are aligned to readily identifiable deliverables. The project must be able to marry output documents such as reports (to satisfactory quality), training resources and other items to both terms of reference and agreed contracts.

²⁹ Review of FIT-SEMA Project, Uganda. HITCHINS and PRAG (2005).
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Market alignment: Project fees must be aligned with both the market's ability to pay and the consultant's perception of their own value. There is little point in engaging a consultant at a certain rate, only to discover later that the market is ill equipped to match that rate. This may lead to consultants choosing not to work for certain elements of the market since they may see it as a 'pay drop'. Or alternatively, consultants may choose to adopt permanent employment thus removing themselves from the market.

4.7 Project Approach

The SEMA project adopted a 'facilitative' approach that involved using indirect interventions such as networking, player alignment, intelligence and awareness building. Its approach is about catalysing, initiating, motivating and linking to stimulate the market. The project recognised that it must not become a market player and should not play a direct role in the market system. A facilitator is external to the market and is funded by a donor to expand and improve one or more particular markets for the benefit of specific target groups. The SEMA project has exercised discipline by matching interventions to the level of the market, emphasizing technical assistance over financial inflows, and maintaining a low profile. It has implemented light touch interventions with little financial support to market players with a commitment to sustainability. It is about getting others to do things via a strong understanding of and engagement with the market; and by adopting a "sensitive" approach which encourages local ownership. It has remained flexible and responsive and focused on the 'why' and 'how' rather than what the project does.

Understanding market need is critical to appreciating where capacity building was required. For example, SEMA undertook needs assessments at station level prior to introducing capacity building activities. Not all stakeholders have the same needs, and as such activities, were clearly tailored so as to be sensitive to what stations themselves perceived as their need. In the wider market, SEMA needed to appreciate what was available by way of capacities. Only then could it build linkages to removing identified constraints.

Critical Success Factor³⁰

Tread lightly in the market: Donors and facilitators should not be too visible as stakeholders often expect subsidies; and do not smother the market with inappropriate funding as this will suppress or crowd out private suppliers and may damage the market.

4.8 Project Processes

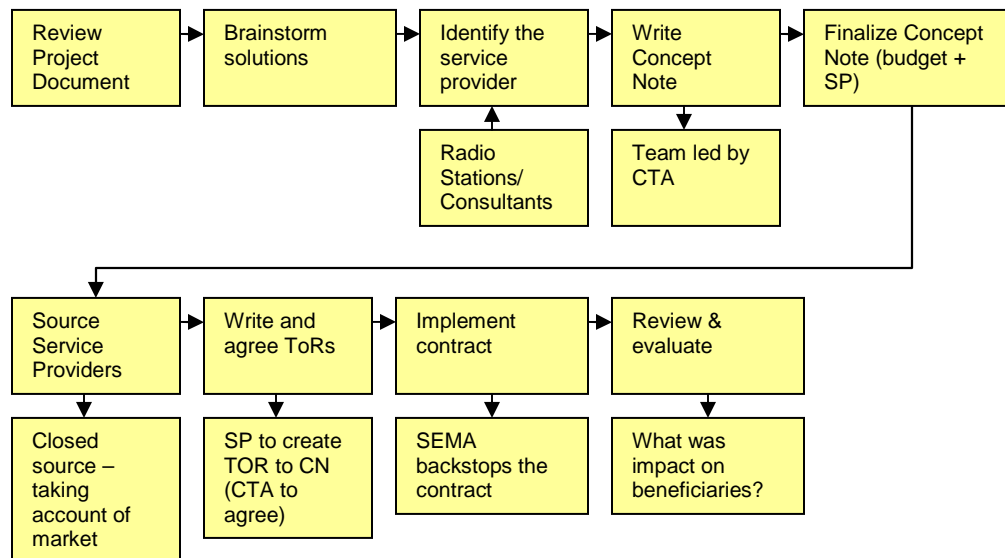
In order to ensure appropriateness and efficient delivery the project employed a process approach to planning specific activities. Within each pillar of the project, a rigorous system was adopted toward inception, review, approval and implementation of project activities. This was intended to enable a strong creative development process which would be:

- Inclusive both within and beyond the immediate project team, often including the input of both beneficiaries, for example, radio stations, and the implementing parties such as consultants.
- Exhaustive in that the process included referral stages and as such allowed strong consultation and reworking prior to activities being approved.
- Manageable and controllable with the core team acting to back stop each activity and ensuring appropriate monitoring and evaluation. It was also noted that in most cases evaluation would where possible be separated from implementation thus ensuring independent verification.

³⁰ Many of the CSF concepts are distilled from the Seminar Reader – 'Developing Commercial markets for BDS'. MIEHLBRADT and MCVAY (2003).

- Accountable in that there were clear audit trails covering each critical section in the process.
- Highly flexible such that there were at least three stages during activity development in which the project could call for a reworking prior to implementation.

The following diagram represents is a sample process model was applied to developing and delivering specific activities:



Learning Points

Processes are important: Under the tenure of the first National Programme Coordinator (of the extension phase), there was no processed approach to managing activities. The project's activities were informed by groupings of activities which, although were subject to assessment and appropriacy depending on the stakeholder, activities were largely standardized, notably training. The project during 2006 – 2007 became overly media centric. This was in line with the objective of maximizing the number of radio stations being crowded into the project. By adopting the process, the project was able to reassess available resources and focus on delivery to the key beneficiaries the audiences.

Critical Success Factors

Formalize processes: The project was at its most effective and efficient when it became beneficiary focused. The implementation of a process model allowed the project team to ensure that they did not become activity based but rather enabled them to adopt a clear path to implementing activities and understand the value of that activity in the context of the wider project. This also enabled team members to be able to conceptualize, discuss, agree, review and implement with a clear vision of expected outputs.

Be solution oriented: By ensuring that stations were handled individually, there is the potential for ensuring that the project maximizes its ability to understand the station's aspirations and expectations. Where this is aligned, the project maximizes the opportunity for mainstreaming the business programmes and opening the door for sustainability.

5. KEY LEARNINGS OF THE EXTENSION PHASE

This section comments on the implemented activities in support of the project outputs for the extension phase. The intention is to add value to the lessons already drawn from previous SEMA project reviews and incorporated in prior sections of this report.

Project activities were targeted around the key project principles of; sustainability, the strengthening of service markets and the engagement of media as a driver of change³¹. These three elements formed caveats which informed the appropriacy of each activity.

5.1 Output 1: Deepening Sustainability of Radio Programming

Since this project represents an extension, many of the business radio programmes were already on air. However the review team noted that due to project issues in 2006, significant training of partner stations was largely undertaken in 2007. The core value addition for the stations was the capacity building element. This broke down in four core areas; technical production, programming and presentation, sales and marketing and the development of internal audience research capacity. The evaluation team found that of the initial group of partner stations from the 2004 – 2005 phase, upwards of five stations had, by 2007, either downgraded their programming or removed it altogether. Project consultants attributed this to a combination of staff turnover, lack of senior management or ownership support and poor commercial revenues in the initial project phase. At the start of the project, the team worked across thirty three stations. At the beginning of 2007 it was decided to reduce the number stations in light of pressure on resources and the need in the second half of the project to further embed programmes. Greater focus was given to stronger stations within the group. This also recognized that a more holistic approach had to be taken with the business of radio rather than simply motivating stations to continue programming through occasional training activities. As a result the number of stations within the core supported group was reduced to fourteen – generally one from each region so as to be able to provide national reach. This did not include the stations facilitated under output two.

The key milestones in project implementation include:

Develop and publish a book on managing rural radio stations that highlights the need for more audience-led programming: this was supposed to occur at the beginning of the project in order to underpin station capacity building activity and provide reference points for long term best practice. Due to the need to engage the core consulting team and SEMA management issues in 2006 – 2007, this activity was deferred to 2008 – 2009. The manual is now in draft form and should serve to reinforce the capacity building undertaken during the project.

Support existing management trainers to undertake training based on the book of rural radio management: as noted above the book is yet to be published. However, the content of the book is a reflection of many of the training practices undertaken during the course of the project. So in a sense the book reflects the value of the training. The review team feels that many of the critical best practices were adopted by the most successful stations during the project period.

Support radio stations to embed regular audience research into their business operations: Part of the overall training package was the need to create sustainability of programming through station commitment to developing a dialogue with its audience. The project demonstrated this as a training output by facilitating consultants to support stations in carrying out field research, which took the form of either face to face interviews or local focus groups. The research was subsequently used to inform programme content maps and develop continuing methods of initiating audience feedback. Within stations who adopted the model, such as CBS, this led to the development of 'listener champions' who became the local contact points for the programme. The effect of this was that the programme map became entirely audience led.

³¹ Project Document. Extension of the Small Enterprise Media in Africa (SEMA) Project in Uganda. ILO (2006).
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Learning Points

Audiences are the key: It is notable that audience research demands resource commitment on the part of the station. Whilst it is critical in regards to both maintaining and improving the quality of programming, it does demand that senior station management recognize their audiences as the only way of sustaining their business. The implementation of continued internal audience research is often leveraged within existing staff capacity and seen as a 'burden' cost, especially if the station did not perceive the programming as being profitable.

Audience research is critical: Radio stations who understood the critical need for planned audience research accepted that this was the only way to 'own' their audiences. In the case of Mega FM, Gulu, it was considered that small business programmes as drivers of audience, were more important than the programmes themselves being commercially profitable.

Content monitoring is an important tool for stations: It helps in the assessment of station performance and indicates areas of strength and weakness. Sustainability is important and stations must be prepared to pay for the service.

Critical Success Factors

Appreciation of the need for audience dialogue: Station management must appreciate that audiences are at least as important as revenue generation. Research is expensive in time and resources, so without the 'buy in' research is unlikely to be carried out. Ensuring that research is embedded as a project element provides the key to driving appreciation of audience primacy.

Integration of research results: Research is not a function of sales or programming. It sits at the centre of station operations; providing programming with essential information regarding the direction of format and style of programmes, and likewise sales and marketing in its ability to market its audience to potential advertisers.

Develop the market for commercial technical radio training (programming, production and journalism) by stimulating improved supply and demand: As indicated earlier, the project worked largely through independent consultants. From the first phase, the project succeeded in facilitating between six and eight new consultants (all of whom are working independently). The objective of encouraging growth in consultancy capacity was to ensure that there would be substantive consulting capacity beyond the life of the project. During this phase, the project sought to double the size of the existing market. This was achieved initially through motivating existing media professionals to apply for contracts. In addition, the project undertook a Train the Trainer programme for journalists in which, through public notice, journalists attended a specialist radio business course. The intention was specifically to improve radio journalism training capacity. The review team found that there had been an increase in the number of independent consultants, and that at least four of the partner radio stations had engaged the services of consultants on a commercial basis. Of the other stations, most indicated that they saw a need for involving consultants. However, they cited cost as the key issue in committing to further contracts.

Learning Points

Be cogniscent of training costs: Asking existing core consultants to facilitate training of additional consultants was seen by some as a conflict of interest. In addition, there was no understanding of the capability of rural stations to meet independent consultant costs and as a result few of the radio partners had engaged the services of consultants within the project period. Consultants were seen as too expensive for a number of independent stations.

Do not offer training for free: By SEMA offering extensive 'free' consulting and training during

the project period, partner stations had no need of incurring additional consulting costs. It remains to be seen as to whether the expansion to the consulting market is sustainable.

Technical support and training provided to radio stations to improve their ability to market audience-led programming: Capacity building can involve a myriad of activities from formal and on the job training to linkages workshops, network building and intelligence and awareness building via publicly disseminating research and organising field trips. It is about a clear understanding of existing capacities and knowledge plus the information and skills gaps that require attention. It is about capacitating the right people to their jobs more efficiently and more effectively. SEMA facilitated and supported a multi disciplinary team across the whole period of the project to deliver directed interventions at stations level. This was mainly undertaken on a station by station basis, although some workshop activities did involve groups of stations. The nature of the capacity building was defined by a needs assessment, carried out either by SEMA or a delegated consultant.

The capacity building and mentoring component was critical to project success. The programmes developed under the project demanded significantly better capacity than many of the radio partners were capable of providing. The review team noted what whilst training broke down into distinct pillars; production, programming and sales and marketing plus audience research, the project approach changed during implementation. It became clear that SEMA's training in particular, was perceived by the industry as high value, and unique to this market. As such, in order to maintain consistency, the project sought to broaden capacity building to include cross station skills including radio business consulting. This was intended to empower stations to take a more holistic approach to their business.

From a programming perspective this also sought to embed skills such as to mainstream the business programming and thus give it primacy within sales and production. In addition, the team noted that for a station to be successful in its participation, it would have to adopt station wide changes in business practice. Again, within the project, the review noted that where stations institutionalized training systems and changes in practice from SEMA training (such as CBS, Buddu FM, and NBS) they reported significant improvements both in audience impact and on their overall level of commercial revenue.

Many of the capacity building activities were undertaken on the basis either full subsidy or cost shared. Typically, cost sharing meant that SEMA would meet consulting fee costs and the station would pick up logistics costs. Again this was on the basis of demonstrating the value of these services. This was with the intention of building linkages between suppliers and consumers i.e. the consultants with radio stations. This helped stations understand the need for and the opportunity of buying in services for the long term. For the consultants, their involvement in the whole capacity building process enabled them to identify, test, and evaluate the needs of potential future customers. The critical element again is value and finding points of connection between providers. Stations which chose not to engage additional commercial training did not, at the decision making level, fully appreciate that value.

Learning Point

Allow partners to design the training regime: Although training needs were assessed, stations were usually offered consultant designed training programmes. Consultants were also limited in their time to follow up with trainees. Noting factors such as staff turnover, it is imperative that the training architecture be such that the training period allows for refresher training programmes and remedial action where required. It is important to note that even within the length of the SEMA intervention; most partner radio stations maintain their own training regime.

Critical Success Factors³²

Train local radio trainers – Partner with suppliers who understand audience interests in developmental and content based broad casting. Technical radio training has historically been provided by development and bilateral aid agencies and has therefore primarily been supply led. The growth of a local training industry has therefore been constrained and distorted by the supply of free training and training attached to allowances and/or free equipment. Empower these local service providers to understand project methodologies such as business development service provision and market approaches to PSD.

Trigger demand for local training - The local training supported by the SEMA project has been seen to be more relevant and appropriate to the local industry's needs than most of the training offered by international and donor supported trainers since it is responding to specific demands from radio stations and is provided by trainers with experience in the local industry.

Desirable Success Factor

Internalize training: Radio stations, like any other business, encounters staff turnover. It cannot be assumed that stations will contract additional commercial consultants. It is important that training capacity be embedded primarily with the station.

Work with major radio advertisers to develop incentives to new innovations in small business radio programming: A key observation from the previous review was the sporadic nature of commercial support for programmes. This is one of the key channels for sustainability. The project document made little mention of the specifics of working with potential advertisers. At the beginning of the project, with the CBS pilot programme, project members demonstrated the value of the programmes by securing start up sponsors, both of whom are still involved in that show. However, in this phase the project concentrated on directing contact with advertisers through radio station sales teams. A number of advertisers and media buyers did attend a number of activities including the workshop on gender issues and the value (cost benefit) of audience research. However, linkages between advertisers and the project were largely restricted to pushing the profile of radio business journalism, and by extension the business programmes through the creation of a radio business journalist category at the annual journalism awards.

Learning Points

Build awareness among advertisers: Advertisers continue to be largely unaware of the opportunities offered by rural radio. They buy on the basis of time slot (peak) and price because of a lack of differentiation on the part of stations. Key advertisers remain unaware of the value of content and the potential for commercial opportunities within these programmes. This is attributable to a number of factors; radio sales staff turnover, the quality of radio sales staff, remuneration structures, communication issues between sales teams in Kampala and head office, poor customer service on the part of the radio station, continued price discounting of business programmes limited understanding of radio by advertisers and advertising agencies.

Mainstream and package programmes: Those programmes which are sustainably profitable have been mainstreamed by the radio station. The station has marketed the programme and placed it on the schedule at a time attractive to advertisers. In addition, profitable programmes tend to also be 'package' sold meaning that the station has expanded the programme beyond its initial once per week slot, and either repeated the show, or increased the amount of small business programming. This is subsequently sold as a more sustainable package to advertisers.

³² Excerpts from 'Project Document. Extension of the Small Enterprise Media in Africa (SEMA) Project in Uganda'. ILO (2006).

Undertake a review of the radio audience research industry and support the improvement of research to ensure more effective representation of the rural, women and small business audiences: Media ratings are the key criteria by which both radio stations and advertisers alike measure their audience. In Uganda through the annual UAMPS survey compiled by Steadman/Synovate, this is the key benchmark. However, given the fragmented nature of the radio market, the survey is considered by many to be flawed. This is based on criticism of both sample size and sampling methodology. The rural radio industry in particular feels that the survey fails to represent the quantity and quality of their audiences. This has a direct affect on their ability to accrue revenue. From the perspective of the researcher, the survey has a high level of financial risk and as such limits their opportunity to grow the survey in terms of sample size and frequency. The project undertook a number of initiatives to encourage debate and action. This included a review of the survey and suggestive enhancements. As a consequence the sample size doubled over the period of the project. This is attributed to a combination of increased demand for rural information coupled by an increase in the number of subscribers.

Learning Points

Commercial research partners and services are an important tool: They assist in the assessment of station and programme performance and an indicator of both strengths and weaknesses. However, these services must be sustainable. SEMA paid for the compilation of audience research, but the challenge is to ensure that stations understand the value and benefit from such research and are prepared to pay to continue independently purchasing these services. Taken in tandem with the work undertaken to encourage the creation of internal research panels, the project correctly identified that a robust research partner is critical to alleviating risks to long term sustainability.

How research is financed is an issue: Currently, the benchmark audience survey is run entirely as a commercial operation. The researcher shoulders the whole risk. This is hampering the ability of the industry to further develop the sample size, sampling area or the frequency of the survey, which most industry users feel should be monthly. In addition, buyers, and in particularly, advertising agencies, will purchase survey findings and subsequently pass them on to their clients, thereby limiting the ability of the researcher to broaden sales. The survey must find a different financing method. This must include everyone along the advertising chain, starting with clients, incorporating other stakeholders including media but also the development community and government.

Support NAB and/or other stakeholders to organize and run policy dialogues and workshops to ensure effective and fair legislation of commercial radio in Uganda: The project worked through the UMDf, a non profit lobby group specializing in media development in policy and advocacy. Again the intention was primarily to alleviate risk which would potentially be caused by adverse legislation. This activity was engaged in particular to facilitate influence over the passing of the Broadcast Policy currently before Parliament. Through the development of increased awareness of the importance of a pluralistic media it was felt that a more facilitative environment could enhance both content and thereby improve sustainability. It is notable that the project worked through a third party, since the ILO cannot be seen to be directly influencing parliamentary policy.

Learning Point

Policy issues are ongoing: It is difficult to quantify impact during the project period. Whilst the team recognizes that there is a higher level of awareness regarding the importance of positive media policy, the actual impact is likely to be felt later. However, attribution is an issue since this project is only one of the lobby organizations working in this area. It was further noted that this element was enacted in 2008. Had it been implemented earlier there may have been greater opportunity for measurable impact.

Critical Success Factor

Appreciation of policy role: Policy has the capability of either supporting the development of a project, or more hampering the ability of the project to facilitate impact. It is imperative that the project appreciate the dynamic nature of the current Ugandan media environment. It had to accept that whilst policy support did not necessarily demonstrate clear value during the project period, it is critical to underpinning the future success of the project.

In conclusion, the review found that a number of the small business programmes are amongst the popular and profitable within their radio stations. The CBS format, Nekolera Gyange has demonstrated a high level of brand growth to now extend beyond radio to include live events, all of which are commercially sponsored. Similarly, the Twezimbe format at Buddu FM, again, has grown to ten hours of programming per week and has served to significantly increase the audience and review value of programmes around it. These are clear examples of the SEMA model at its most successful. However, there were certainly factors which informed this success - these included; management support, acceptance of long term potential, appropriate advertiser education and active participation of the audience both in listening to the programme and in ensuring the stations were made aware of the fact that they saw these programmes as 'their' programmes. It was ultimately the adoption of the model at station level which drove the success of the programmes.

Learning Points

Behavioural change needs to be station wide: There was sporadic performance between the partner radio stations. This is largely attributable to issues surrounding ownership and resultant commitment on the part of senior management. This implies a need for stronger qualification at the outset of the project. Some stations did not necessarily alter their systems and processes to respond to the business practices propounded by the facilitated programmes. For example, sales people did not alter their methods of selling in favour of just these programmes.

Pursue institutionalised practice: In order for a station to truly benefit they must alter their systems and processes appropriately. Innovative new radio practices stimulate by the SEMA project were adopted widely within the stations and influenced other programmes. This was actively pursued by the project as the SEMA supported programmes were often too different and diverse in their nature to sit comfortably on some schedules. Where stations institutionalized training systems and changes in practice from SEMA training they reported significant improvements in audience impact and on their overall level of commercial revenue.

Critical Success Factors

Being attentive to commercial considerations: All stations have specific revenue needs. Generally business owners' prime concerns are the ability of the business to sustain itself. The project needs to be acutely aware of the need to include the commercial investor in the process. The business of the advertiser is to market their products, often to the detriment of media understanding. It is clear that changing assumptions and developing media selection criteria, particularly to the appreciation of the nature of audience relationships, is fundamental to ensuring commercial viability. This may require a heavier intervention on the part of the project team given the limitations of radio station sales capacity.

Mainstream and institutionalize business programming: Given the importance of small business programming to audiences, and the need to make it 'easy' for advertisers to buy into those programmes - radio stations must respect the value of the programme as much as the audience. It is difficult to expect an investor buy into a programme which the station itself does not regard as being important enough to justify strong support. This has to be part of station commitment and must be seen as strategic to the station's development. Beyond this, a station must recognize the opportunity for its own development, with a commitment to embrace change

throughout its organization. These programmes cannot exist in the long term without the institutional structures and working practices being consistent with their needs. This extends through every station department from production, to programming, sales and research.

Credible audience ownership: The most successful programmes facilitated by the SEMA project were those which could demonstrate strong audience ownership - where audiences value programmes and feel that they are involved and leading content. The roll out of Nekolera Gyange (CBS) to live broadcast and the increase of Twezimbe (Buddu FM) to ten hours a week of programming indicates that small business programming both can engender positive behavioural change and be amongst the most profitable programmes in radio. It must be the listener or the listener's representative, such as community leaders, who drive the content mix. The radio station risks alienation if it drives content without recourse to listeners.

5.2 Output 2: Broadening the Coverage of Small Business Radio Programmes

Introduce and promote the concept of business radio programmes to additional stations in northern Uganda: Increased peace and stability in Northern Uganda presented an opportunity in this phase to increase the level of project impact. Prior to this phase SEMA had worked with two stations within the former conflict area. During the course of this phase, the project approached a further eighteen stations, drilling down to seven following formal assessment and level of station commitment. Generally the team noted that all stations had fulfilled their commitment to develop small business programmes. This was achieved using the same development model used with existing stations elsewhere. However, programme performance remains sporadic within the new stations. Lessons from the previous phase indicate that embedding these programmes and the development of sustainable audience and advertiser relationships takes time. A key challenge for the project, especially in the light of the great donor dependency of Northern Uganda, was how to find ways of accelerating the process. Typically this included crowding in stations through the training components and accelerating content linkages through project introductions to development agencies (see below). Whilst the project intended to work with eighteen stations in the north, this number was whittled down to seven on the basis of team assessment of those stations who met the criteria required.

In addition, the project sought to broaden the extension of the programmes beyond radio. This followed the successful development at CBS of sponsored event days and listener champions. This involved CBS running outside broadcasts in which the public were invited to contribute through recorded debates. This was fully sponsored by a commercial business. Public debates act as content leaders for small business programming enabling the listener to drive content priorities. In Northern Uganda, SEMA intended to drive audience ownership by encouraging the introduction of community led public debates. The project sought to include the gender component by identifying northern women's journalism group, NUWCO as the implementing agent. NUWCO selected a group of female journalists (many of whom were working with SEMA facilitated programming) and trained them on the conducting of debates. This would provide the potential of migrating these skills back on similar radio formats such as call ins. Debates were well attended, however, institutionally, NUWCO were not strong enough to mature this concept; they were largely donor dependant and while they had some success in getting debates recorded and rebroadcast, they were not so successful in bringing in commercial sponsorship for the events. This presents a threat to sustainability.

Learning Points

Compare and contrast experiences: The extending of the project's work in the North provided the project with an opportunity to compare experiences with existing stations elsewhere. The project followed a similar model to that elsewhere, although given more limited station resources, the success of the project in this area was more inconsistent. Nevertheless there was clear evidence in stations that were committed to the process of innovative programming. Without directly being led by SEMA, some stations had mainstreamed their programming, and

extended their radio brands to areas such as supporting farm days and linking farmers to buyers.

Time is essential: Given the project management issues in 2006, this component suffered start up delays. As a result the project had limited time to embed programmes. Implementation was sporadic and was subject to substantial risk, particularly given station ownership and commitment issues. Many of the northern Ugandan stations are currently developing and their financial and resource capacity to meet their obligations was more limited than stations elsewhere. In addition the concept of public debates did have the opportunity of providing communities with a strong voice. However, this concept was largely new and would have benefited from broader support such as formally linking NUWCO to radio stations and potential sponsors for both on and off air.

Offer choice: There was a desire on the part of the project to suggest the magazine format as a desired format. This, for many low revenue earning stations, represents significant commitment to investment. This places greater pressure on the need to acquire revenues quickly and threats to audience participation levels. It is suggested that the stations be given a broader range of format options, which may be, more palatable for senior station management, especially in the absence of commercial revenues.

Critical Success Factor

Institutional assessment - Given that the nature of policy and environmental development is a continuing process, projects must engage with organisations capable of longevity. This is more so given that these groups are often non commercial. Projects must implement a thorough financial and institutional assessment prior to engagement. This assessment must take a view on the organisations ability to seek non donor related revenue and be in a financial position to potentially continue facilitated activities beyond project end.

Support the improvement of quality and coverage of existing business radio programmes in Uganda:

SEMA revisited its existing partners from the previous project period. During the course of this stage, the project engaged third party consultants to provide refresher training to the key 14 regional champion stations. It was noted that given the slower than expected growth in advertising support, there was the danger of development fatigue in which stations felt they were over committed to the process without necessarily seeing the benefit of advertising. The review team concluded that there should have been more effort made during the last stage and at the beginning of this to assure better advertiser links. This would have countered some of the training dependency issues encountered when the stations were re-approached. It was also noted that the need to institutionalise new production and sales required that stations take a more holistic view of their businesses such that SEMA facilitated programmes could not stand alone from overall management of the station. Consultants were able to adjust their capacity building input to cater for the need for station partners to embrace wider change. This included; support of station management to create improved business and financial plans, embedding of SEMA training into other programming, improvements to station wide sales management. In terms of third party linkages, the team noted that where station management valued (and had the available resources) SEMA facilitated capacity building, stations had re approached consultants and awarded additional paid for contracts. There was a clear correlation between the level of owner/management commitment and the desire to participate and fund additional consulting. This was not necessarily in terms of direct revenue benefit, but also, as in the case of Mega FM in Gulu and Buddu FM in Masaka, an appreciation that this project offered a unique opportunity to build and retain audiences.

Undertake a gender assessment of the radio programmes and initiate activities to enhance the impact of radio in empowering and informing women: This element was not clearly thought through in the project document. There was no correlation between a gender level assessment of

radio staff and the core outputs of the project. After all the issue of gender is not simply about women's empowerment, but rather that men are also included in this process. The gender assessment was carried out but the approach subsequently changed. A 2 pronged approach was adopted in 2008 focusing on piloting in house gender training and mainstream gender issues across all training programmes plus the promotion of women as audiences. The activity was redesigned to align it more closely to MSE business development. So instead of focusing only on institutions, the project encouraged radio stations and broadcasting practitioners to understand the value of women. In particular, the project sold the idea of women as household budget holders and business owners. Sensitization was undertaken through a series of workshops which encouraged radio professionals of both sexes to understand how to talk to female vis-a-vis male audiences, to understand how female voices are used (e.g. the use of women's voices in adverts) and to plan content around both the distinct needs of women and men. In the case of one station, they established a women only phone line to ensure that women were adequately represented in programming. Another looked at

Learning Points

Embed cross cutting issues: The gender component was assumed to be with specific regard to women's empowerment rather than understanding gender issues. This has relevance across all content, and there is validity in ensuring that gender is considered at all stages of programme preparation, from concept to scripting. In terms of better embedding, that this could have been mainstreamed by including it earlier within the other training components. By running it separately it risked alienating men especially in central and north where there are cultural factors which affect the role of women. Although cross cutting issues do have broad appropriacy to business programming, by not specifying in detail the relevance to purpose, it took time to find an appropriate application. These activities should be thought about at project start up. In addition, bringing cross cutting issues in earlier in the project may have served to better change business practices amongst radio stations, reflective of a weakness in the original project design.

Desirable Success Factors

Clarity of purpose and mainstreaming of cross cutting issues: Cross cutting issues such as health and gender have application across the content spectrum. They should have clearer context in the project document, and should only be included where there is clear relevance to the project objectives. The project team must own these issues and be clear of their effects relative to meeting project objectives. A component on how to tackle these should be included across training plans.

Initiate midnight business programmes for the fishing community to reduce impact of HIV/AIDS: Similarly for fishing communities, although programming is yet to go on air, the project identified that HIV/AIDS is a key issue for economic sustainability of this sector. Finding an appropriate project approach proved challenging. Following audience research, the original concept of broadcasting programmes at midnight programming was abandoned in favour of a mid evening slot to accommodate more appropriate listening patterns. As the project finished, a community based group were working on a series of radio dramas as the method for disseminating information. Community groups have close proximity to audiences and it was felt that although the project has a willing broadcaster, the involvement of a community based group would accelerate impact. It is too early to establish whether this activity will have impact.

5.3 Output 3: Embedding the Making Development Newsworthy Agenda amongst Development Agencies in Uganda

Work in collaboration with development communication consultants to pilot test support to local government in implementing the principles in making development newsworthy: The MDN book was drawn from an earlier phase of the project. This was intended to demonstrate an alternative

way of disseminating information from development led activities. Previously, development agencies had tagged on a media component to project activities. This resulted in dissemination through media using either external expertise or with the agency pushing its own content priorities. In return the radio station would agree to broadcast programmes at a mutually agreed time slot and would be remunerated through the agency paying for the airtime. In some cases, the station would produce the programme in order to ensure that the programme fitted with the station's format. Again, however, by paying for the airtime the agency felt that they owned the programme rather than the radio station, thus reducing the radio station's ownership and thus commitment. Programming would be distorted in favour of the agencies agenda rather than that of audience need. For the agency this model is attractive given that it guarantees that content is broadcast in a form synergous with their project objectives.

However, there are a number of issues with this approach. Firstly, the radio station rarely has substantive input, and as such it risks compromising editorial policy and potentially risking the value of its other programmes. Secondly, unless some form of audience research has been undertaken there is no guarantee of this programming being effective. The audience is generally not part of the process. Finally, because the relationship is primarily commercial, there is little incentive for the radio station to maintain the content beyond the period of time for which the airtime is paid. In cases where information broadcast is critical to audiences, the removal of programming which is relevant to them can have negative effects on both the development agency and the radio station.

Information needs are constant and as such are likely to extend beyond the period of any paid to air programmes. For the content provider their budgetary processes are likely to only allow for a certain allocation of resources for these programmes, so by seeing this as an activity, it is unlikely that they will commit long term to developing content relationships with stations.

The MDN book takes a different approach. It assumes that the development agency and the station both share the same objective of delivering impact at audience level. This involved radio partners understanding that development agencies are a strong source of expert knowledge. So by building relationships with providers this would have a positive impact on the quality of their programming. In addition, by creating better programmes this would likely support further growth in audience, which in turn supports the acquisition of commercial revenue. Further, the radio stations retain ultimate control over their programme content and are then able to better focus on their particular audience needs. This is then congruent with the skills capacity building undertaken by SEMA.

SEMA took a demonstration approach in the extension phase to promote none paid to air programming via the training of both stations alongside content owners. By building closer links with radio stations, the development agencies were able to engage more frequently with the station. This involved them broadening their sphere of knowledge by working with radio station staff, many of whom had a strong understanding of audiences gleaned from on air contribution, participation in field recordings and through audience research undertaken as part of the project. This helped content providers gain a better understanding of what media offers and what it can achieve. MDN helped agencies use media more effectively with reduced costs and many continue to use the approach without SEMA support.

Migratory Model

Given the heavy weight of paid for airtime in the Ugandan market especially amongst humanitarian agencies in the North, the project employed a migratory approach. It originally intended to formally train development agencies but altered the approach during the project. Instead it worked with a number of established development agencies (ACF, Land O'Lakes, Rural Speed) to firstly, stimulate radio stations to control content (including content mapping, content sourcing and presentation and delivery), and subsequently motivate radio stations to market the quality of this content to advertisers.

It was difficult to alter the market mechanism within the project period. So the approach accepted that the development agency would continue to underwrite the airtime cost in the short term, thus alleviating some of the financial risk to the station. In addition, the agency met the information collection costs such as field recording. From the point of view of efficacy, the level of airtime costs in the Ugandan market were extremely low (airtime costs were an average of \$300 per hour). The intention was to ensure that sales teams then committed to sourcing commercial revenue so that content would remain on air beyond the airtime cost.

For content provision, SEMA facilitated the linkages between development agencies and the radio stations. In addition, other content providers would be sourced, which would often include local government expertise. By bringing together all parties, through planning workshops and formal content training, SEMA would foster stronger relationships.

It is notable that the project did adopt an alternative to the paid to air model by seeking to develop content relating to forestry and the environment. Although yet to be broadcast, the four participating stations are all accepting content to be included in the current business programming without the paid airtime element. This is based on the acceptance of content value on the part of the radio station, i.e. that the management of forestry resources in their particular region is of critical importance to the audience and therefore must be included in the programme. This is an indicator that where a station already believes in the necessity of certain content, they are prepared to engage with other agencies to acquire this content. It is possible that the adoption of MDN as a content model will depend on radio stations seeing value of the content in delivering increased audience and/or the ability of the content to attract commercial revenues.

Learning Points

Keep repeating the offer: There continue to be expectations beyond the financial element. Development agencies continue to expect ownership of content and want their branding on the content, particularly if they pay airtime costs. This can lead to brand dependence thus militating the opportunities for replacing airtime costs with commercial revenues.

Extend the offer: There remain risks to sustainability of content by applying MDN to only the development community. Although there is evidence that some radio station continue to primarily use project facilitated experts such as local government offices, the project did try to crowd in additional content providers such as model farmers, traders and other commercial businesses and their extension workers. There remains a question of what happens when a development agency exits. This is particularly the case in Northern Uganda. The review team found that all the development agencies within the project had a positive reaction to their involvement. In the case of ACF they are repeating the initiative independently of SEMA later in 2009.

Embed the offer: Moving the working of MDN away from institutions to specific projects was a reflection that the MDN as a model is not yet established. The intention of driving the process through identified content partners aimed to not necessarily alter the way these organizations managed media, but rather was intended to demonstrate to radio stations that they could achieve more from content provision partnerships. This was successful although it remains to be seen whether those content providers who paid for airtime are able to partner long term without this airtime payment.

Replicate the offer: Even despite the well publicized work of SEMA, there is evidence that development agencies continue to support radio stations with financial contributions. Beyond paying for airtime, there is evidence that some agencies continue to donate equipment, and pay station staff to attend training. This represents a continued risk to station commitment to the SEMA model. As such it is imperative that the SEMA experience be picked up beyond agency project level such that donors encourage adoption.

Critical Success Factors

The value of content: Content is not advertising. Content rather adds value to editorial against which to hang advertising revenue. It is imperative that radio stations appreciate the role and the service offered by the content provider and in particular the indirect value of content as an audience driver. The commercial element should always be secondary. This must be clarified at the beginning of the partnership between the project and the radio station.

Sticking to editorial policy: Experts from private companies may be interviewed on radio programmes to talk about relevant issues. It must be made clear that the advertising of specific products or services is not allowed (adverts must be paid for) and this should be embedded in the editorial policy of the programme.

Responsibility for MDN: Beyond the end of the project, there is a question about who will continue to drive the MDN agenda forward. It naturally sits with third party consultants. Whether on its own or against a portfolio of consulting services. MDN's success in the future will be ramped against the acceptance of value in what a buyer is prepared to pay.

Expand the content agenda: recognise that content providers are innumerable and extend far beyond the development community. Facilitate increased aggregation and access to demand led information via improved content linkages with a broader variety of content owners such as listeners and private sector businesses. Ensure they understand the benefits and enhance their involvement and coverage. 'Making Making Development Newsworthy' can sit along side "Making Entrepreneurs Voices Newsworthy" and "Making Input Suppliers Knowledge Newsworthy" for example.

5.4 Output 4: Consolidating Learning under the SEMA project through documentation and dissemination to other stakeholders

Write and disseminate manuals and papers on enhancing the radio industry to cover small enterprise issues more effectively that will target various stakeholders in international PSD: The SEMA project is a strong example of a pilot intervention that up scaled and enjoyed replication in the market. In order to spur replication by the market and other PSD practitioners SEMA has seen it as critical to place great importance on an explicit and targeted learning and dissemination agenda. SEMA has considered it is important to dialogue about the project concept and values plus demonstrate the opportunities to market players and the vision of change expected. Most importantly it has demonstrated the benefits and value that involvement can deliver to the different stakeholders. In order to do so it has developed role models and case studies, captured lessons learnt and demonstrated the opportunity to catalyse market change. This has involved sharing information publicly about market gaps, opportunities plus lessons learnt in open workshops, on the internet and in the media and then offering further technical capacity building to take advantage of such opportunities.

Answering the following key questions afforded SEMA the ability to dialogue with PSD practitioners about the lessons learnt on the SEMA journey and how its successes can be replicated elsewhere³³:

- What's working/ not working and why?
- What were the key challenges and how were these overcome?
- What the incentives/ risks are for each actor including who is gaining and who is losing?
- What evidence and potential exists for the model to serve larger numbers of people and the potential scalability?
- What evidence and potential exists of market capacity to sustain improvements over time without continued support?

³³ Concepts from 'A Systems Approach to Value Chain Development'. BEAR (2007).
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In addition, the SEMA project has had a wide influence on other development practitioners in Uganda and beyond and has developed and published a number of CD Roms and manuals aimed at market players and market stimulation including:

- Making Radio work for Rural Users
- Radio as a Tool for MSE Development
- A practical Guide to Managing a Radio Station as a Business
- Making Development Newsworthy Book

The project has been granted a two month extension in order to help drive the dissemination component. The team aims to feed out project learning to at least two hundred organisations both within Uganda and beyond. The intention is to feed replication elsewhere. The review team has recommended that in addition to the produced manuals, it also seeks to consolidate all training materials in order to provide the foundation for coursework in institutions. In addition, the CTA has engaged senior ILO management in Geneva to champion the project laterally with other markets, which has been encouraging. SIDA have extensive involvement in other media related activities, and there is a desire to ensure that project experiences are fed across SIDA affiliated networks.

Present and promote the papers and SEMA experience internationally through networks, conferences and websites: The project has had the opportunity of sharing its experiences particularly through BDS/PSD conferences. SEMA must now make stringent efforts to feed all of its written material through these other channels including the e-toll that accompanies this report.

Learning Points

Capture and disseminate learning on an ongoing basis: This element, targeted specifically at the ability to replicate elsewhere, suffered as a result of the management issues at the start of the project. Consequently, a number of the documents underpinning the training elements, such as the 'How to run a radio station manual' have not yet been published. It would have added greater value had the manual been compiled earlier in the project.

Institutionalise learning: There are a number of avenues for institutionalizing project learning within the donor community. Both within SIDA and ILO there appear to be a commitment to publishing and distributing. Both organizations have strong linkages, and there is an opportunity for broadening awareness and dissemination by further driving it through the Joint Donor Committee. In addition, there is the potential for aggregating the experiences globally and strategically positioning the project learning within other internal institutions by including it within the ILO training infrastructure.

6. OPPORTUNITIES and THE FUTURE

This section comments on future opportunities and areas for adding value to the intervention as the market develops without continued SEMA support. It is not intended to be a recommendations section but to define areas of consideration for practitioners replicating the intervention.

As previously noted, the project has not yet run its course. However, there is the question of the how much a development project is dependent on commensurate market development. In particular, the ability of the project to drive systemic change especially in those areas which are highly dependent on other market forces, such as advertiser needs and strategies and the broader policy environment. The media system is highly dynamic and as such as significantly evolved within the period of the project intervention. It is this evolution which contains pointers to future market led opportunities.

6.1 The Role of Mobile Telephony

As mentioned previously, Uganda has seen significant growth in mobile telephony over the last ten years. Subscriber numbers are close to ten million (33% penetration) and the critical growth market for providers is in rural areas and in particular amongst small business owners. This opens further opportunities for stations to access strong advertising revenue streams. Mobile companies tend toward taking ownership of particular media properties and holding them over the long term. Consequently, mobile advertising revenues can ensure that programmes enjoy a bedrock of revenue. However, the expectations of mobile companies are becoming increasingly focused on the ability of stations to 'prove' the value of their programming and especially a station's capability to activate their audience. It is therefore likely that the expectations of the investor will increase over time. That said, for those stations who do invest in audience driven content, they are likely to further increase their revenue base.

The advent of mass ownership of mobile phones amongst small and micro enterprises opens up the opportunity to build strong value added information links, bringing a raft of additional media content to their hand sets. This will be particularly driven by the need for mobile companies to accelerate revenues per user, especially once subscriber levels have reached saturation. This may include providing portal platforms for business related information such as market prices, business news and market information. For a media related intervention, this may broaden the stakeholder base and further segment the market challenging radio stations to further drive their content value to retain their audiences.

For radio stations, the ability to for their audience to communicate directly with programmes either by voice or by short messaging service (SMS) has opened the door to far greater flexibility of programming. This has already included the introduction of more call in shows and the ability of listeners to communicate with experts and presenters live. However, there are further opportunities to be derived from broadening the offer to both audiences and advertisers alike. This includes: the development of radio activations, increased market information services, rolling off content from small business programmes onto mobile phones and in the ability to move beyond FM radio to provide radio content through GPRS services. Whilst this presents a challenge for future projects to understand the potential of market take up and audience information preferences, it does provide for audiences to be further empowered in choosing how, when and where they consume their media.

6.2 Development of Additional Media

The SEMA project focused on radio as the mass media in Uganda. However, radio is not the only media. Over the last five years, the number of television stations has doubled within estimated weekly penetration of television now standing at close to 30%. The team did not have access to numbers on internet penetration, although it is understood to be growing in rural areas. Evidence from the field work indicates that at least two television stations, WBS and UBC have already

started small business and agricultural related programmes which have been attributed by a number of radio stations as copy cat formats. Similarly, media convergence brought about by the rationalization of media through the growth of multi media owners may offer the opportunity of working across newspapers and magazines. Vision Media Group, for example, have recently bought a radio station and started a further two. Coupled with *The Vision* newspaper, it is possible that content may in future be featured beyond broadcast media into print, thereby increasing the scope of opportunity for further intervention.

The internet offers huge potential as penetration grows, with audiences able to access an almost unlimited amount of information on demand. Already there is a massive amount of small business related information online and with the development of internet service provision companies and portal operators (including mobile telephony) there is strong potential for the support of content providers to aggregate and develop a series of user friendly applications for rural businesses.

In the above, many of the same issues as affected the SEMA project remain current including; the selection and packaging of information, journalistic and production values, the ability to interrogate and attract potential audience, and the commercial support components. This may also offer another avenue for the MDN model to motivate content provision.

6.3 The Effect of Advertiser Needs

The SEMA project did not build a significant battery of activities for development of the advertising component. As spend continues to grow (with forecasts of a further growth of 25% in 2009), there remains significant opportunity of working with advertisers to help them better understanding how media operates, and how they can gain both more efficiency and effectiveness from their budgets. There is a question about how much a market development project can affect this component given the proprietary nature of corporate business decisions. However, it was identified from the review that advertisers still do not appreciate the value of audiences, but remains wedded to the concept of audience size, often reflected by choosing to buy perceived audience quantity around peak programming. This is further demonstrated by the lack of investment beyond advertising slots or programme sponsorships, such as on air activations and cross media promotion in rural stations.

However, there remains a need for further advertiser education, potentially involving third party consultants to support advertisers in gaining an improved understanding of how media works and the opportunities related to advertising investment. This may include supporting improved media industry contribution to existing educational institutions or in the development of courses through industry bodies such as NAB.

6.4 Broadening of Audience Research

Most of the players in the Ugandan media market accept that there remains a need to further develop a clearer understanding of audience needs and tastes. This is in terms of a deeper and more frequent media ratings system and beyond this the potential for introducing new forms of research capable of providing media houses and advertisers alike with new forms of audience assessment. This may include:

- The development of telephone research (using a growing mobile subscriber base).
- Introduction of new advertising measurements such as recall.
- The value of content monitoring.
- Use of SMS and Interactive Voice Recognition (IVR) as feedback and research tools.

6.5 Expanding the Content Agenda

The content agenda has primarily focused on embedding MDN among development agencies. It recognises that in developing countries it is the development sector that generates volumes of

pertinent information that often is not effectively and efficiently disseminated. Whilst this agenda is extremely important, this focus has resulted in other types of content owners being crowded in only via agencies for thematic programmes such as dairy content via Land o Lakes.

The issue of content provision could be expanded to further enhance content provider involvement and coverage. The aim should be to facilitate increased aggregation and access to demand led information via improved content linkages with a broader variety of content owners such as listeners and private sector businesses. This then suggests that 'Making Development Newsworthy' can sit along side "Making Entrepreneurs Voices Newsworthy" and "Making Input Suppliers Knowledge Newsworthy" for example. All of these would then hook off the framework of content provision and make content not just about development agency information.

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