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and Global Value Chains*

Promoting the Culture Sector through Job Creation and Small Enterprise Development in SADC Countries:

The Film and Television Industry

by

Avril Joffe and Natalie Jacklin

InFocus Programme on Boosting Employment
through Small Enterprise Development
Job Creation and Enterprise Department



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Promoting the Culture Sector through Job Creation and Small Enterprise Development in SADC Countries: The Film and Television Industry

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Foreword

This research report is part of a set of five studies commissioned by the ILO in the framework of the project “Small enterprise development and job creation in the culture sector in the SADC region”. This project was funded by the Ford Foundation and implemented by the InFocus Programme on Boosting Employment through Small Enterprise Development (IFP/SEED). This project explores the possibility that the promotion of cultural entrepreneurship that harnesses local talents, skills and heritage may be especially resistant to the competitive pressures of globalization and may provide innovative possibilities for boosting incomes and generating quality employment in a sector that is normally overlooked by policy-makers or addressed with piecemeal and traditional approaches.

IFP/SEED’s work in the area of Market Access is based on the premise that small enterprises can only grow and become competitive economic ventures when they have clear and well-developed channels for selling their outputs. The lack of adequate markets for the consumption of cultural goods and services is frequently identified as a major obstacle to the development of a truly vibrant and economically viable culture sector. This finding is highlighted repeatedly in these SADC region studies. The use of a value chain analysis, adapted to the culture sector, has been a particularly effective tool in these studies to identify strengths and weaknesses and help inform policy recommendations for bolstering the weaker “links” in this chain. The partnership forged between the Ford Foundation and the ILO for this project aims to marry the concerns of the Education, Media, Arts and Culture division of the Ford Foundation with the ILO’s tools and approach for creating more and better jobs for men and women, in order to transform the culture sector into a sustainable form of job creation and income generation for developing countries.

Over the past 15-20 years, a majority of both developing and industrialized countries have initiated policies and programmes aimed at promoting the micro, small and medium enterprises in view of their important job creating potential. Support has been directed toward the major sectors of the economy, yet the economic potential of local artistic talents and a nation’s cultural heritage has been largely untapped.

Although the presence of cultural activities may be perceived to be widespread, the development of the culture sector is rarely treated as a serious economic venture and few practitioners are actually able to make a living solely based upon their artistic trade. Few examples exist where government policies have given systematic and strategic business support to this sector. As a result, the culture sector in most developing countries plays a much more limited role – as a source of jobs, revenues and foreign exchange – than in industrialized countries where it contributes to a significant proportion of gross national product, indicating the need to promote what might be called “cultural entrepreneurship” among developing country artists. Furthermore, limited data exist and the true scale and dimension of local cultural activities are generally not well documented. In particular, few culture sector studies have been undertaken in southern Africa.

For this reason, original field research was commissioned by the ILO to provide more detailed information and case studies of culture enterprises in the SADC region, with an eye toward providing policy prescriptions that would help ameliorate the major constraints preventing the growth of small enterprises. Five studies were conducted in the following cultural areas: crafts and visual arts; music; performing arts and dance; TV and film; and ethno-tourism. These five studies have been published as SEED Working Papers and readers may find various studies from this set to be of interest.

The present study assesses the film and television industry in southern Africa to be relatively small and undeveloped, although it offers much potential in the form of developing infrastructure and emerging stories. Most of the companies in the industry are small or micro and are seen as having the capacity to create jobs, stimulate employment and contribute to the growth of the economy. The study notes that access to funding is one of the biggest hurdles to the development of the film and television industry in southern Africa. This includes both public and private sector funding. Most production outside of South Africa is almost completely dependent on donor funding and both national governments and private investors often consider the industry too high risk.

While the use of southern Africa as a location for foreign production is growing, this is a contentious issue for filmmakers and government officials. On the one hand it brings in work and foreign currency, while on the other hand, it tends to be unregulated in the region and this can lead to instances where the indigenous industry is undermined. Problems of distribution of audio-visual products in the southern African region is arguably the primary blockage in the Film and Television value chain in the region. This situation arises because the market for audio-visual products in southern Africa is still relatively small due to lack of resources from the broadcasters, the high ratio of rural, poor communities in the region with low spending power and low levels of appreciation for film and television productions due to lack of exposure. Most countries in the region have local content quotas in place for broadcasters – although these are not always effectively implemented. Nevertheless, television penetration is still low in many areas in southern Africa, which is a serious constraint, although it is growing steadily. The report notes that the film and television industry in the SADC region is characterized by high levels of contractual workers who are not protected by the same employment legislation as workers in other industries and stakeholder bodies are quite weak in the region, although a number of initiatives exist to establish organizations to lobby government and build the industry.

The lack of effective protection of the intellectual property rights of local artists is another crucial issue in this sector, and local practising artists are generally unaware of the implications raised by their mastery of specific know-how and use of traditional practices and designs. In this regard, these studies have benefited from a collaboration with the Director, Mr. Guriqbal Singh Jaiya, Small and Medium-sized Enterprises Division of the World Intellectual Property Organization (WIPO), (<http://www.wipo.int/sme>). Comments on intellectual property related to the TV and film industry were provided in the text, as well as Annexes 2 and 3.

This study was written by Ms. Avril Joffe and Ms. Natalie Jacklin, who are consultants based in Johannesburg and can be contacted by email at: avril@caj.co.za. Ms. Anne Posthuma, Senior Specialist, Small Enterprise Development, IFP/SEED was the Project Coordinator responsible for coordinating this project. Ms. Avril Joffe was the Consultant and Project Advisor who oversaw the development of these studies. It should be noted that the views presented in this document are those of the authors and do not necessarily reflect the views of the ILO or its constituents.

Kees van der Ree
Director (a.i.)
InFocus Programme on Boosting Employment
through Small Enterprise Development

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Executive summary

The film and television industry in southern Africa is relatively small and undeveloped, although it has much potential in the form of developing infrastructure and emerging stories. The industry is important to the region for several reasons. It helps in the process of nation-building, communication and developing a common shared identity as Africans. It provides a forum for sharing ideas and debate and a delivery mechanism for other cultural industries in southern Africa. Its potential to educate while entertaining the public may prove a competitive edge for film and television in the SADC region.

Most of the companies in the industry are small or micro and are seen as having the capacity to create jobs, stimulate employment and contribute to the growth of the economy. Of the five industries examined in this series published by the ILO of five studies on the cultural sector, the film and television industry is the one most located in the new economy. For this reason it can be a powerful tool for communities who are increasingly being marginalized as a result of globalization. This being said, there is generally a lack of good scriptwriters in the region, an issue now being addressed by the African Script Development Fund, the South African Scriptwriters Association and the South African Scriptwriters' Laboratory. One concern about script development initiatives in the region is that while they may produce good quality scripts these are not always transformed into viable productions – underlining the need to link those being trained in script development with producers.

Access to both public and private sector funding is one of the biggest hurdles to the development of the film and television industry in southern Africa. Most production (except in South Africa) is almost completely dependent on donor funding and both national governments and private investors often consider the industry too high-risk.

At present, three parties drive production: television broadcasters, donor organizations and foreign film makers. South African broadcasters are actively involved in commissioning productions from independent producers. Their limited commissioning budgets usually engender a relationship different from the norm in developed countries, in that the broadcaster contributes the equipment and the producer accesses funding through alternative sources (such as donor agencies) to evolve a co-production. Donors play a key role both in terms of providing funding as well as setting the agenda for the types of film made. As a result, many producers concentrate on stories dealing with social issues (pregnancy, AIDS, gender relations). There are some concerns that donors have too much control over the content of production and in determining who is successful in the industry. However, the influence of donor agencies on production is also determined by the standing and management ability of the producers concerned.

The use of southern Africa as a location for foreign film production is a growing trend in South Africa, Mozambique, Mauritius and Namibia. This is a contentious issue for film-makers and government officials alike. On the one hand, it brings in work and foreign currency can boost the industry in the region if properly regulated. On the other hand, it tends to be unregulated in the region and can lead to instances where the indigenous industry is undermined.

The distribution of audio-visual products in the SADC region is arguably the primary blockage in the film and television value chain, mainly owing to its relatively small market, characterized by a lack of broadcaster resources, the high ratio of rural, poor communities in

the region with low spending power, and low levels of appreciation for film and television productions due to lack of exposure.

Film markets, such as the Sithengi market in South Africa, provide viable opportunities for deal-making, networking and showcasing southern African film and television productions, as do film festivals which should be more frequent and more widely located. There are also some examples of mobile video units in the region, which take audio-visual productions to rural communities. These can play an important role in audience development and providing access for rural communities, as well as market feedback for the film producers.

Most countries in the region have local content quotas in place for broadcasters – although these are not always effectively implemented. This can enable the development of an indigenous industry when implemented as part of a package (for example training programmes) of government measures to promote growth. Television penetration is still low in many areas of southern Africa but it is growing steadily.

The industry has several characteristics: a high level of contractual workers who are not protected by the same employment legislation as workers in other industries; rates of pay in southern Africa are much higher than those in the rest of the region; and some industry domination by white people and by men. Stakeholder bodies have been quite weak in the region, particularly outside of South Africa. However, a number of initiatives are being taken to establish organizations to lobby government and build the industry.

A number of successful cultural entrepreneurs in the region are showcased in this report, in keeping with its aim of providing concrete examples for the industry. Similarly, concrete proposals for projects are recommended and are grouped into four broad programmes covering the development of: human and cultural capital; product, business and the industry; the market; and policy regulation and legislation.

Film-making is a challenging combination of commerce and art. The art of film-making is however no more important than the business of film-making. Successful film makers are those who develop their entrepreneurial skills and “force films into existence”. The report is concerned with how to develop entrepreneurs amongst the hundreds of film-makers in the region. As such, it is both a contribution and a call for all those interested in the film and television industry in the SADC region to devise clear plans of action to ensure a vibrant and flourishing industry.

Abbreviations

ABN	African Broadcast Network
AME	African Media Entertainment
CAJ	Creativity avriljoffe CAJ cc, Cultural Strategy Firm
CAFTEP	Consortium of African Film & Television practitioners
DACST	Department of Arts, Culture, Science and Technology
DTI	Department of Trade and Industry
EG	Entertainment Guarantors
EU	European Union
FAN	Film-makers Association of Namibia
FNCC	Franco-Namibian Cultural Centre
FRU	Film Resource Unit
GATT	General Agreement on Trade and Tariffs
IBO	Independent Broadcasters Organisation
ICASA	Independent Communications Authority of South Africa
IDC	Industrial Development Corporation
IFC	International Finance Corporation
ILO	International Labour Organization
IPO	Independent Producers Organisation
KPMG	Auditing and Consulting Firm
MISA	Media Institute of southern Africa
NATPE	North American Television Programme Executives
NBC	Namibian Broadcasting Corporation
NDIMA	East African Association of Journalists
NGO	Non-governmental organizations
NFVF	National Film and Video Foundation
NTVA	The National Television and Video Association
PAWE	The Performing Arts Worker's Equity
RMB	Rand Merchant Bank
SA	South Africa
SABC	South African Broadcasting Corporation
SACOD	Southern African Communications for Development
SADC	Southern African Development Community
SAFFCO	South African Film Financing Corporation

SAGE	The South African Guild of Editors
SASC	The South African Society of Cinematographers
SASWA	The South African Scriptwriters Association
SCRAWL	The Scriptwriting Training Organisation
SETA	Sector Education and Training Authority
SME	Small and medium enterprises
SMME	Small, medium and micro enterprises
UK	United Kingdom
UNESCO	United Nations Educational, Scientific and Cultural Organization
WAJA	West African Journalists Association
WIFT	Women in Film and Television
WIPO	World Intellectual Property Organization
WTO	World Trade Organization

1. Introduction

1.1 Background

The southern African region has much to offer the global film and television industry. There is general agreement amongst role players and observers of the industry that a wealth of creativity and stories exist in the region. However, there is also agreement that the industry is poorly developed and, in many cases, even in decline. Some commentators of cultural industries in the region have in fact argued that the region does not have film and television industries, but rather film and television assets. This is not the view taken in this report. Most of the components of an industry are present in some SADC countries. There are enclaves of vibrancy, albeit the industries are predominantly small, donor-led and severely lacking in finance. South Africa appears to be the only country in the region where private sector investment (as opposed to sponsorship) has been available for production.

In 2000, it was estimated that less than 2 per cent of Africans had ever seen an African film. Production on the continent hit a peak in the 1980s, when 30 films were produced per annum, largely with the aid of foreign investment. This figure has since declined. South Africa currently produces, on average, two feature films a year and is the biggest producer in the region. US films have a 70 per cent share of the African market, while African films have a 3 per cent share in their own market.¹ While this appears to indicate a real problem for a continent that in the past 85 years has produced over 600 feature films (as well as numerous short films), the figure is not that different for Europe (although this is a much bigger audiovisual consumer market). Put simply, it signifies the dominance of Hollywood, the limited finance available for marketing the African film industry, and poorly developed domestic audience appreciation for local product. According to the Film Resource Unit of South Africa:

Broadcasters and cinema owners have been reluctant to screen African film, because distributors of mass-produced overseas films, television series and sitcoms are able to charge less for their products. As a result, many of the remarkable films that were banned during the apartheid era have still not found their way into the popular imagination, and new African films still battle against the screening patterns of an old era.²

Key issue: While a fledgling film and television industry does exist in the southern African region, it is poorly developed, under-resourced and struggling to compete with international product.

The past 10 years have witnessed the emergence of the location industry³ into a valuable industry. Prior to 1994, Zimbabwe had the strongest location industry in the region, due to their relatively advanced infrastructure and favourable government response to foreign film-makers. Anti-apartheid films such as *Cry Freedom*, which could not be shot in South Africa, were shot in Zimbabwe. After 1994, South Africa attracted more of the location and facilitation⁴ work. Its specialized film infrastructure is capable of

¹ *The Dispatch*, Mar. 2, 2000.

² FRU pamphlet, *Towards a Culture of African Film Appreciation*.

³ Foreign-financed productions shot in southern Africa and distributed abroad.

⁴ When a producer helps to facilitate a foreign production by scouting out location, providing computer services, managing work permits, and so on.

producing world-class content. This, combined with its diversity of locations and favourable weather conditions has made South Africa popular as a film location. In the global context, it is extremely cost-effective to produce film material in South Africa, Mauritius and Namibia in the SADC region.

The indigenous film-making industry and the export of “local content” (film and television material financed and produced for exhibition and broadcast in South Africa) has had limited success in all of the SADC countries. The key challenge facing the local industry is the lack of private sector funding for the production of quality content for export. The ownership of local content by broadcasters and the industry’s parochial attitude toward the development of programming for export continue to exacerbate the situation.

Some industry analysts argue that francophone Africa is far ahead of anglophone Africa in film-making. Cameron Mackenzie⁵ writes that French-speaking countries in Africa have support from the French government to promote its language and culture. The French government plays an active role in providing funds for production (see, for instance, French language movies from Senegal, Mali, the Ivory Coast and Algeria). In comparison, English language productions on the continent tend to be privately financed. “Nigeria, for instance, has a vibrant and active film industry, producing in excess of 500 films a year, but many of these tend to be low-budget productions with little in the way of script quality or technical excellence to recommend them to a wider audience”.⁶

“You only get material and political support”

Gaston Kabore, a world-renowned African film-maker from Burkina Faso argues that the film industry in francophone African countries is not more advanced, just different. He commented that the French Ministry of Cooperation has maintained ties with former colonies and assisted in the presentation of African films at festivals throughout the world. Governments are also more involved in this industry in francophone Africa. As Kabore says: “With my last film, I had access to infrastructure, crews, equipment and cars – you only get material and political support” (in southern Africa).⁷ Meanwhile, anglophone countries are more advanced in the use of video and documentary-making.

However, southern Africa has a comparatively high level of infrastructure for film and television production in comparison to African countries outside of the region. This infrastructure includes production and post-production facilities, training facilities and equipment. However, films to emerge from West Africa are often considered better than those from the South. One reason postulated for this difference in quality is that the rate of change in southern Africa has been so rapid that film-makers suffer from an identity crisis. Pedro Pimenta, a film-maker from Mozambique who has been heading up the UNESCO Film Training Project in Harare observed that during his life time he had been subjected to colonization, Marxism, a war and currently extreme free market capitalism in his home country.⁸

⁵ “African films – by Africans, for Africans”, by Cameron Mackenzie (with FCB Redline, a pan-African communications agency), in *ScreenAfrica*, Aug. 2001.

⁶ *ibid.*

⁷ “Stories: The way Africa does it”, in *ScreenAfrica*, Nov. 1999.

⁸ Interview with Pedro Pimenta, Chief Technical Advisor at the UNESCO Film Training project, Harare, 16 Aug. 2001.

Key issue: It is clear that African film-makers across the continent can learn from one another and, more importantly, lobby their respective governments for concrete support in the form of co-productions and cross-border cooperation. Partnerships between African film makers and film companies from different parts of the continent would be essential to begin to secure the necessary independent funding that film-making requires.

1.2 Definition

The film and television sector consists of all players involved in film-making and television production, which includes feature films, documentaries, sitcoms, serials, series and “soap operas” produced for cinematic release, television and video. Money is made through advertising, pay-TV subscriptions, licence and copyright fees, work for hire, freelance fees and tickets.

1.3 Importance of the film and television industry in southern Africa

The film and television industry, as with the other cultural industries, is important for qualitative and quantitative reasons. While this study seeks to define the industry in more conventional industrial terms, we also wish to highlight the more intangible benefits the industry provides.

1.3.1 *Nation-building, communication and developing a common shared identity as Africans*

Film and television is an extremely important and powerful industry for communicating ideas. It can forge a common culture and systems of values as well as inform people of a diversity of culture and ideas. While it is very much a globalized industry, it can provide minority communities with local news and entertainment and allow them to see the world through their own lenses. On a political level, this industry can provide a forum for debate and discussion as well as information, which is essential for an individual’s participation in community life. It can therefore play a central role in the workings of a democratic state as well as nation building more generally.⁹

Film critics often assert that African film-makers are “overtly committed to the challenges of social and political reconstruction and renewal prevalent throughout the continent today”.¹⁰ An example is the late Senegalese film-maker, Djibril Diop Mambety, whose *The Little Girl Who Sold the Sun*, shot on the streets of Dakar, is a staple on European university cinema circuits.

With independent finance and funding, more films will depict issues relevant to today’s Africans, with top quality local content showcasing the talent of local scriptwriters, actors, directors and which display a quality of technical excellence that is equal to the best in foreign films.

As proponents of the traditional African art form, many African film-makers see themselves as storytellers, so the style of the film reflects a slower pace as the overall

⁹ CIGS report (1998), by Natalie Jacklin and edited by Avril Joffe for the Department of Arts, Culture, Science and Technology in South Africa.

¹⁰ Mackenzie, op. cit.

picture unfolds. The socio-political commentary, the examination of age-old practices and customs – especially their exploitation and abuse for individual profit – and a call for a return to traditional African ideals of unity and community, make for a riveting commentary on the state of the continent today. The African movie genre is distinctly different from that which originates in either Europe or America, so the result is a fresh experience for viewers.¹¹

1.3.2 *Delivery mechanism for other cultural sectors*

Film and audio-visual products provide exposure for other cultural sectors such as through music videos and the television broadcasting of theatre, dance performances, and visual arts events and profiles.

1.3.3 *Educational value*

An article published online on the California newsreel asks: “Is it possible that African film-makers could take the lead in pioneering a film culture which regards film as a place for collective reflection and community building?”

The potential for film and television to educate while entertaining the public is becoming a massive movement in developing countries generally. Southern Africa is no exception. The role of film and television production is in many cases focused on communicating educational, social and developmental messages with the aid of donor funding. The development of films, videos and television productions which educate while entertaining may well be the “competitive edge” for the industry in this region. For example, the Zimbabwean-based company, Media for Development Trust, is a non-profit company which specializes in “using the entertainment format for social messages.”¹² Other examples are the South African television series, *Soul City* and *Yizo Yizo* which are extremely popular entertainment and are clearly focused on educating as well.

1.3.4 *SMME opportunities*

The majority of film and TV companies are small if not micro enterprises. Throughout the region and in South Africa in particular, government attention is focused on the growth and development of SMMEs because of their capacity to create jobs, stimulate employment and income generation, and contribute to the economy. While barriers to entry in the film and television sector are not low (compared to the craft sector), new technologies and their convergence are helping to lower these barriers.

1.3.5 *Entertainment*

It is increasingly recognized that in the new economy, entertainment value is central to everyday human activity. Eddie Mbalo, CEO of the South African National Film and Video Foundation (NFVF) observed how watching CNN news, about wars and conflicts around the world, has sensational value – what going to the cinema would usually satisfy

¹¹ *ibid.*

¹² Interview with John Riber from Media for Development Trust, Harare, 16 Aug. 2001.

– and also what “made in Africa” films and television programmes have to compete with in terms of entertainment product.¹³

1.3.6 Film and television as part of the new economy

The film and television industry is very much an industry that is integrated into the new economy. It can be a powerful tool for communities in southern Africa who are otherwise marginalized by globalization. This can happen in two ways: i) the industry can provide a voice for marginalized communities through the telling of their stories; and ii) it also provides opportunities for developing high-level skills and better-quality jobs than industries such as the craft sector. This is not without difficulty as the global nature of the industry also means that there are powerful transnational companies which dominate the global industry and create very high barriers to entry.

Key issue: The southern African film and television industry plays an important role in nation-building and communication. It is also a delivery mechanism for other cultural industries. Increasingly the industry is playing an important role in edutainment – educating while entertaining the public. It is an industry comprised of a number of small and micro enterprises which are internationally recognized as having the potential to create jobs. Lastly, it is an industry very much located in the new economy and can offer high skills and better-quality jobs than other more traditional industries.

1.4 Global trends

1.4.1 Convergence

Increasingly in the world of the Internet and with the development and technological sophistication of multi-media more generally, cultural works, such as music, books or audio-visual productions are delivered electronically on-line. The crossover interests between music, film and publishing will require new thinking about definitions and support to these seemingly different sectors.

The convergence of multimedia and Internet technologies has raised questions in the World Trade Organization (WTO) Council for Trade in Services: Are cultural goods part of trade discussions or part of the services sector? The sale and dispatch of a video cassette containing a cinematographic work to a broadcaster for instance, is considered as a trade in a good, while the mere sale of the transmission rights of that same work and its delivery to that broadcaster via satellite is considered as a service. But broadcasters and film producers consider themselves as part of the services industries. For some,¹⁴ products delivered on-line constitute “virtual goods” and are covered by WTO. So films broadcast on television are services, while the same films broadcast on line would represent goods, even though no tangible good is involved. Similarly, the major music distributors in the world now argue that music distributed over the Internet should be treated as goods under the provisions of the WTO and not as services. However both the WTO Council for Trade in Services and the European Commission have a contrasting view. The former contend that “... the General Agreement on Trade in Services (GATS) is technologically neutral in the sense that it does not contain any provisions that distinguish between the different technological means through which a service may be supplied” while the latter

¹³ National Film and Video Foundation web site, CEO speech, 11 Aug. 2001.

¹⁴ WTO discussions and US and Japan trade discussions reported in Culture Committee (cc-cult) 21st meeting, Strasbourg, 19-21 Sep. 2000.

state this more clearly: “Films, news, music, games and multimedia contents are services. They are not tangible and do not have any entity in themselves. When they are incorporated in goods (tape, CDs, paper) they remain services. In the absence of the goods (tapes, CDs or paper) the services nature of the product is the only relevant one.”¹⁵ Governments in the SADC region will need to address this issue in their cultural industries as these industries start to compete internationally.

1.4.2 Merging of genres

The film and television industry has gone through a technical revolution in the past 10 years resulting in the merging of most genres and media. Increasingly the art of film-making converges on all other cultural sectors (music, multimedia, the Internet, the visual arts, performance and photography. According to Harmon Cusack, South African Society of Cinematographers, “Cinematography is more than just making pretty pictures. A successful cinematographer is just as familiar with the history of the visual arts as he is with the light sensitivity of film emulsion or the intricacies of a video camera, to that of rigging a huge sound stage for a big production.”¹⁶

1.4.3 Global trend toward diverse product and decreasing reliance on American production

The globalization of film and television productions and the emergence of multinational media companies dominating the global industry has, in many cases, resulted in the standardization of audio-visual fare across the globe (i.e. similar television programmes are viewed in Maputo and in New York). However, a counter-consequence of globalization in recent years has been an increasing demand for greater levels of diversity in programming. The trend in Europe is away from American programming to programmes with more diverse locations and subject matter. This opens up possibilities to develop export markets, in countries other than America, for local content and to upgrade the standard of local production. There is also an increasing need for audiences to be viewing products that originate from their own countries and with which they can identify. There are now more European quota systems in place and more local slots in European countries. The French, Germans and the British are favouring own local programming which is also finding a market throughout Europe and Latin America.

1.4.4 The high relative cost of local content

Despite the above, it remains the case that it is cheaper to acquire American product for broadcasting than to develop local programming, as the cost of the American programme is recovered in the domestic market of the USA. Therefore, in spite of local content quotas, in order to save on programme acquisition costs, broadcasters are tempted to include more American programmes in domestic broadcasts. Estimates are that it is up to 25 times more expensive to acquire a local television programme for broadcasting than it is to import a programme from the USA. An additional challenge in South Africa, for example, is to lure ad-spend from the white-dominated industry to programmes attractive to the wider mass of the population. Rand-for Rand, more advertising is spent on

¹⁵ The WTO Council for Trade in Services has a contrasting view. See *Progress report to the General Council*, 19 July 1999.

¹⁶ Cusack, H (1999). “Visible Spectrum Awards – a personal perspective”, in *ScreenAfrica*, Nov. 1999.

programmes with 300,000 viewers (such as *Ally MacBeal* or *Frasier*) than programmes with three million viewers (such as *Yizo Yizo* or *Generations*).

1.4.5 Appeal of wildlife, environment and reality documentaries

Internationally TV stations and channel producers are promoting a bigger mix of programmes to cater to a wide range of targeted television stations. Reality and wildlife documentaries, for example, are much in favour.¹⁷ The trend towards greater focus on environmental issues has enabled the South African-based Animazing Workshop to secure a grant from the National Film and Video Foundation for an animated series called Roland the Funky Green Teen for the US market. However, the danger here is that local film-makers become unduly influenced:

Often, film makers are influenced to use subject matter that would appeal to Western audiences – such as wildlife, conservation and other environmental issues – while ignoring topical issues that are more relevant to African viewers. These portrayals, therefore, show the continent not as it actually is, but as it exists in the minds and prejudices of European or American audiences.¹⁸

1.4.6 Closer relationship between television and the Internet

The growing relationship between television and the Internet is confirmed by the attendance of more than 100 Internet-related companies at the MIPCOM international televisual content market. Television producers, distributors and suppliers are consulting with telecommunication, computer software, and website design and broadband providers. *ScreenAfrica* reports that “the web is seen today as the first step in testing a concept which can be widened to other media, and in the process the concept can be improved and developed.”¹⁹

1.4.7 Use of cultural industries to regenerate inner cities

Across Europe and North America local authorities and communities are attracting a residential population back into their inner cities by investing in cultural infrastructure to develop night life through live venues, cinemas, theatres, bars and cafes. While this was not in evidence in the region, Johannesburg has been developing an inner-city neighbourhood, Newtown, using public sector funds to upgrade the Mary Fitzgerald Square into an outdoor event space and public leisure facility. A new initiative is a film and TV broadcast centre including a number of cinemas to showcase South African and African movies.

¹⁷ At a recent MIPCOM television market (Cannes, Oct. 1999), “20th Century Fox International Television had a huge library of wildlife and other documentary programming from the New Zealand natural history unit selling alongside its traditional American network hits such as “Buffy the Vampire Slayer” (Cannes Clips: “Poodles but oodles of news”, in *ScreenAfrica*, Nov. 1999).

¹⁸ Reported in *ScreenAfrica*, Aug. 2001.

¹⁹ Cannes clips in *ScreenAfrica*, Nov. 1999.

Key issue: Global trends provide pointers to the future development of the film and TV industry in the region. The core areas to track are convergence, mergers of genre, the increased demand for diverse product in global series such as wildlife, environment, science, geography and nature, and how cultural assets can be used to regenerate inner city or urban life.

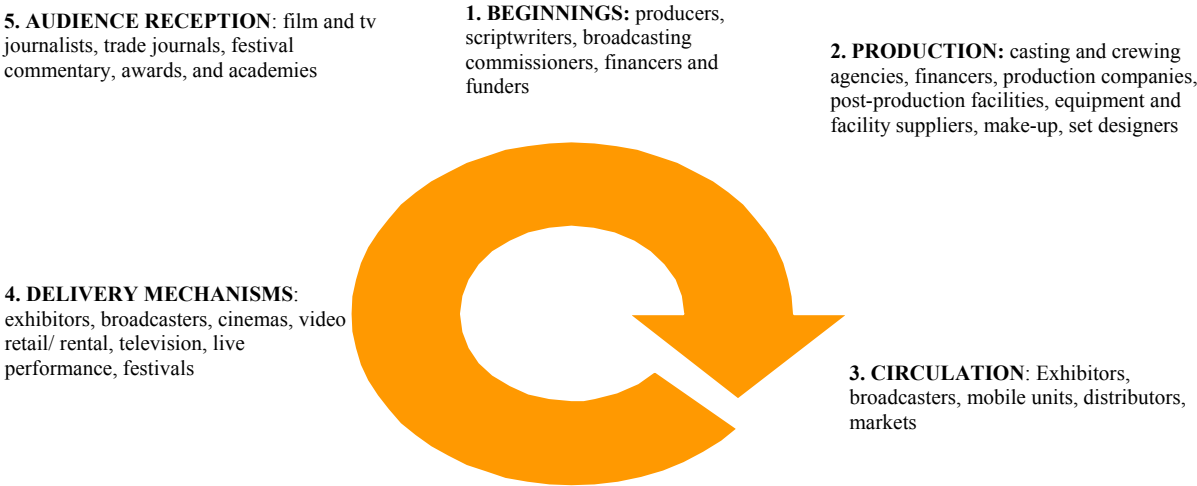
2. Methodology adopted in the report

2.1 Methodology of the value chain

The methodology used in this study is based on an adaptation of Charles Landry’s five-column model (Landry, 2000), which provides a value chain model for the evaluation and analysis of cultural industries. It has been slightly adapted in that we are representing it as a circular diagram with feedback between “audience reception” and “beginnings”.

Beginnings refer to the “cultural milieu” or context in which a television or film production is conceived. Production refers to the process by which a television or film feature is produced. Circulation refers to the process of distributing and marketing the product in the marketplace and delivery refers to the means by which the audience accesses the production. Lastly, audience reception and feedback refers to the response from audiences to the television production or feature film, which feeds into the beginnings or cultural context for new ideas. The specific film and television value chain is shown in Figure 2.1.

Figure 2.1 The film and television value chain in the SADC countries



2.2 Methodology

This study outlines the state of the film and television industry in the SADC region. Data sources are from key informants in the sector, particularly film-makers in South Africa, Zimbabwe, Mozambique, Namibia and Mauritius. Documentary information both in hard copy and on the Internet was available from regional bodies or from well-established South African organizations. Statistics and other quantitative information are largely absent in this sector. The key aim of the study is to develop a picture of the industry both in individual countries and as a region. Opportunities and initiatives are identified, as are impediments to growth. The study concludes with a gaps matrix which informs the interventions which are proposed. These are defined separately for different implementing agents.

3. A snapshot of the film and TV industry in the SADC region

Introduction

During the course of the research for this report, four countries in the SADC region were visited, namely, Zimbabwe, Mozambique, Namibia and South Africa, and, a discussion was held with a key player from a fifth country, Mauritius. A brief snapshot of the industries in these countries is outlined in this section, including boxes featuring major productions, regionally or internationally recognized film-makers, and the foreign films produced in the SADC regions. We present this country-specific information separately so as not to detract from the evaluation of the industry overall in the region and also to provide a context for the discussion. We end this section with a table highlighting key trends and information in all the other countries of the SADC region. In Section Four, we provide an evaluation of the film and television industry value chain in the SADC region as a whole.

3.1 Zimbabwe

3.1.1 Background

The Zimbabwean government in its first decades of Independence (1980-1990) placed strong emphasis on support for the film and television industry. An aggressive campaign was launched to promote Zimbabwe as a film-making venue for films such as *King Solomon's Mines* and *Quartermain*. The reasons for such policies were both economic and political.

It was expected that Hollywood studios would inject money into the economy and provide training for local film-makers, who would, in turn, form a local film industry.

The State therefore invested directly in film production. However, when they invested R5.5 million in *Cry Freedom* it was not as successful as expected, making the government reluctant to fund any other films. They do, however, continue to fund a small number of documentaries through the Ministry of Information's Production Services.²⁰

In 1997, the Zimbabwean film and television production industry was reported to be "experiencing a small boom" both in terms of local production as well as the location industry. This was due to the perception of it being a cheaper country in which to film with lower levels of violence.²¹ However, 2000 was reported as a quiet year for the Zimbabwean production industry.²² Reasons for this decline were related to political upheaval in the country as well as a lack of access to funding. Nevertheless, film-makers in Zimbabwe have managed to produce some highly acclaimed productions during this year, as profiled below.

²⁰ Kedmon Hungwe, 1999. *Fifty Years of Film-Making in Zimbabwe*, Centre for Educational Technology, University of Zimbabwe.

²¹ "Zimbabwe war film turns into a burning issue", *Mail and Guardian*, 1997.

²² *Daily News*, Zimbabwe, 16 Feb. 2000.

The field research conducted in Zimbabwe during August 2001 revealed an industry in decline. The industry is heavily dependent on donor funding and sponsorship, which is currently drying up due to the political and economic crisis in the country. There has also been a leakage of talent from the country as a result of these problems. Many people have made their way across the border to South Africa, where they believe there are more opportunities for aspiring film-makers.

3.1.2 The local production industry

The local production industry emerged after independence in 1980. Local skills and facilities were given a boost by foreign films, particularly *King Solomon's Mines*, three years after Independence. The UNESCO Zimbabwe film-training project has significantly enhanced the local pool of skills. The government's target of using 70 per cent local staff on foreign films has not been rigidly enforced but has helped to train and use local skills. In 1999, the government set up a National Film and Video Production foundation to utilize more efficiently the resources on offer to the industry. It is possible to use blocked funds (dividends retained in Zimbabwe) for film finance. With the present dwindling production, producers in Zimbabwe are now arguing for a greater concentration on video rather than feature film production.

The most active companies²³ involved in production of documentaries and films in Zimbabwe are profiled below:

1. *Media for Development Trust*: The MDT employs 10 people. They currently have the most advanced post-production facilities in Zimbabwe. These include an Avid Non Linear editing suite and media composer for film projects. They also have a sound studio that includes an audio-visual option for film and video sound dubbing, a recording studio for music, radio programmes and commentary programming and a CD mastery, jingles and sound effects equipment. Recent productions include *Neria* (with a budget of US\$350,000) dealing with the emergence of women's rights in Zimbabwe and the relationship between urban and rural African societies and cultures. The film *Everyone's Child* (1996, directed by Tsitsi Dangarembga, a well-known writer and author) is based on a story written by Shimmer Chinoya (author of *Harvest of Thorns*) of a Zimbabwean family devastated by AIDS and shunned by their community. Leading Zimbabwean actors star in the film but many of the younger roles were played by street children trained in a special workshop. This film was first conceived as a training tape for community-based orphan care programmes. As a feature film, it placed AIDS at the forefront of the national agenda. *More Time* portrays a 15 year old girl's emotional turmoil in dealing with falling in love and the dangers of AIDS. *Yellow Card*, in 2000 (with a budget US\$1.5 million, comprising US\$800,000 for production and US\$700,000 for distribution) concerns teenage pregnancy. This highly successful production is discussed later in this report.
 - All MDT films are financed with donor funding and corporate sponsorship. The founders chose to shoot their first film (*Consequences*) in Zimbabwe because the government was facilitating work permits and, also, a fairly sophisticated film laboratory was already in place. This husband and wife team registered MDTs as a non-profit company in 1989. They are currently producing a film about the life of the reputed Zimbabwean musician Oliver Mtukudzi. Media for Development Trust produces support videos and

²³ According to John Riber, Media for Development Trust.

facilitation booklets with all their films. Facilitators incorporate these when showing the films to communities in order to stimulate debate and discussion.

Media for Development Trust (MDT) films have succeeded where many other educational audiovisual productions have failed in drawing big audiences. For example, both *Neria* and *Yellow Card* recorded the biggest audiences at cinemas in Zimbabwe when they were first exhibited, competing with Hollywood blockbuster productions: *Neria* was released in the same year as *Terminator*; *Yellow Card* in the same year as *Mission Impossible 2*.

2. *ZimMedia*: ZimMedia employs four people (excluding two producers Simon Bright and Ingrid Sinclair who own the company). *Flame*, their first feature film production (with a budget of Zim\$3 million) dealt with women soldiers in the liberation struggle and was funded by the European Union. They have most recently been involved in the *Mama Africa* series (see Box 3.1). Bright's own initiative, it is a co-production with M-Net, which has broadcast rights in anglophone Africa. The series has been successfully pre-sold to Finnish TV and Dutch TV. Interest has been expressed from Channel Four, Canal + (France) and VPRO. The series has also been pre-sold to the French station ARTE. The American distributor Winstar has agreed to distribute in the world market. The European Union is providing 18 per cent of the *Mama Africa* budget. *Mama Africa* has won international recognition (Best Short Film award at the Naumar Film Festival in France) and made the Director's Fortnight at the Cannes Film Festival.²⁴

Box 3.1. Zimbabwe productions: The *Mama Africa* series

The six African women directors selected to participate in the compilation of the *Mama Africa* series includes Fanta Nacro's *A Close-up on Bintoun* (Burkina Faso) which won the prize for the Best Short Fiction Film at FESPACO and was officially selected for the 33rd Director's Fortnight at the Cannes Festival; Bridget Pickering's *Uno's World* (Namibia); Ngozi Onwurah's *Hang Time* (Nigeria); Zulfa Otto-Salies's *Raya* (South Africa); Raja Amari's *One Evening in July* (Tunisia) which won the prize for Best Short Film at Milan 2001, and, Ingrid Sinclair's *Riches* (Zimbabwe) which won the City of Venice prize. Producer Simon Bright says: "The *Mama Africa* series is a painstaking collection of the best of our continent's film-making cultures. Its strength lies in the amazing visual and cultural diversity unified by the unique vision of our women directors. This African production has generated an unprecedented amount of interest internationally, and is evidence of the wide potential that this production represents."²⁵

ZimMedia's latest feature film, *The Captain*, is set during the genocide in Rwanda and is co-produced with Canada. Ingrid Sinclair is the writer and director and the film was shot mostly in Zimbabwe. Box 3.2 outlines the activities of leading film-makers in Zimbabwe.

3. *Mighty Movies*: Mighty Movies employs 11 people and count on advanced equipment such as the Avid Media 1000, Three Machine Suite and the Linear Editing Suite. Mighty Movies was established in 1990, initially as a commercial production company. However, with the current economic and political crisis in the country, they now focus on news reporting for SABC and Reuters.
4. *Edwina Spicer*: Edwina Spicer is a veteran documentary producer and director. She directed the documentary *Biko: Breaking the Silence* in 1990.

²⁴ Simon Bright, ZimMedia producer quoted in *Africa Film and TV*, 2001.

²⁵ "Landmark Africa series on show", *Sithengi Daily News*, 13 Nov. 2001.

5. *Ice Films*: Ice Films employs 2 people. Their two 10-minute productions (with a budget of Zim\$500,000), directed by first-time directors and produced using equipment from the UNESCO training project, were launched at the Zimbabwe Film Festival. Ice Films have also been involved in the South African based “Steps for the Future” programme, which involves regional cooperation to produce 30-40 films dealing with HIV/AIDS and are making the Zimbabwean film contribution to this cooperation with a film about a boxer who dies of AIDS in Zimbabwe.

Box 3.2 shows what film-makers are achieving in the SADC region and the potential of this sector for growth.

Box 3.2. Acclaimed film-makers: Zimbabwe

Jit in 1990; *Neria*, 1991 (Zimbabwe’s top grossing movie); *Everyone’s Child* in 1996 directed by Tsitsi Dangaremba and *Flame*, directed by Ingrid Sinclair have won awards at international festivals where they have been well received by audiences.

The Zimbabwean-British-French-Burkina Faso co-production *Kini & Adams*, shot in Zimbabwe in 1996 was the first southern African film to be selected for the Official Competition at Cannes 1997. It won first prize in Feature Films at the 8th Festival of African Cinema in Milan in March 1988. Since then, many short productions (*In the Upper Room* and *Soul in Torment*) have rekindled the industry. In 2000, the super-budget comedy *Dr Juju* was released, as well as the *Yellow Card* (from the Media for Development Trust), which drew record audiences in Zimbabwe. ZimMedia has produced *Tides of Gold* and is in the process of producing the internationally recognized *Mama Africa* series with M-Net.

Zimbabwe was also chosen to participate in MNET’s New Directors for 2000.

3.1.3 **The broadcasting environment in Zimbabwe**

Zimbabwe’s public broadcaster, the Zimbabwe Broadcasting Corporation (ZBC), is very much in control of broadcasting in the country. At the time of this research, Zimbabwe had a 75 per cent local content quota. Some independent producers in Zimbabwe have hailed its introduction as “the beginning of better times, and recognition for their works as an art form”²⁶ while others acknowledge that there is insufficient infrastructure to meet this 75 per cent quota. Furthermore, the ZBC has little revenue to invest in production. They reportedly had 55 per cent local content but this includes re-broadcasting of programmes, sports programmes and actuality and variety programmes.

Box 3.3 lists the foreign productions in the SADC region in the past 20 years.

Box 3.3. Recent foreign productions in Zimbabwe

King Solomon’s Mines

Anti-apartheid features such as *Cry Freedom*, *Mandela*, *A Dry White Season*, *A World Apart*, *Dark City* and *The Power of One*

Clint Eastwood’s, *White Hunter*, *Black heart*

Disney’s co-production with Hinza films, *A Far off Place*

Bopha

The Housekeeper, a Roger Cormon B Movie

²⁶ “Ground Breaking Zimbabwean Production”, in *ScreenAfrica*, July 2001, p. 4.

3.1.4 Education and training

Education and training in the broadcast industry in Zimbabwe is minimal. The Polytechnic does offer training but their equipment is outdated. The UNESCO Film and Video School was a significant asset to the film and TV industry, yet with the end of the funding period for the school, its future is not assured.

3.2 Mozambique

3.2.1 Background

In the early 1980s Mozambique had one of the most promising developing film industries in southern Africa. The industry used to be supported by the National Institute of Cinema (NIC), which was a government agency involved in the production of documentaries and some feature productions. The NIC assisted in creating a strong base by training production professionals and producing weekly newsreel, documentaries and some features. However, the government ceased to fund film productions in 1986 and film-makers have become largely dependent on donor funding.

3.2.2 The local production industry

The early 1990s gave rise to private production companies. These producers have mostly concentrated on the use of video as a cheaper means of production. To this day, the NIC has trained most of the active film-makers in the country. Many film-makers interviewed were of the opinion that the NIC should take on the role of representing and promoting Mozambican films in other countries.

All production companies in Mozambique hire their equipment to each other when it is not in use. Otherwise, they resort to hiring equipment from South Africa, which raises the cost of equipment as there are no tax breaks for producers in Mozambique. Producers are taxed at 60 per cent for all tapes brought into the country from South Africa. Although this money can be claimed back at the end of production, it impacts negatively on the cash flow of the production. There are currently no casting agencies in the country and there is a lack of make-up and special effects people. There are also problems with the costs of sub-titling (required as most productions are in Portuguese).

Five independent production companies operate actively in Mozambique,²⁷ four of which were interviewed during the field research and include the following:

1. *Ebano Multimedia*, the oldest production company in Mozambique, in existence since the early 1990s;
2. *Iris Imaginações*;
3. *Promarte* has worked on television productions with TVM (Mozambican Television) mostly dealing with wild life productions; and
4. *Cool* was involved in a production for the “Steps into the Future” project, as well as in the translation into Portuguese of 14 films which were part of the African Renaissance project of SACOD.

²⁷ Interviews with producers in Mozambique.

Mozambique has a small pool of skilled technicians, including camera people, editors, production managers and sound people. While the Mozambican industry is still quite dependent on South Africa and Zimbabwe for post-production facilities and equipment, this side of the industry is growing. A Portuguese facility house called Cinemarte was established in 1996; it mostly supplies lighting equipment, grips and a generator, as well as editing facilities.

Three of the five production companies in Mozambique are currently involved in producing films for the South African initiative “Steps for the Future” and seven films are currently being produced for this initiative (outlined in Box 3.4). Box 3.5 looks at current film-makers in Mozambique.²⁸

Box 3.4. “Steps for the Future”

This initiative comprised 27 films from the southern African region dealing with the issues of HIV/AIDS. The directors are provided with substantial budgets to allow people to spend more time on making the films and thus produce high-quality documentaries. This is part of an international AIDS awareness project initiated by IKKA Vehkalahti/Finnish Broadcasting Corporation and funded by YLE Finland, BBC, UNAIDS, TV2 Denmark, SVT from Sweden, RTBF from Belgium, SABC, the European documentary Network, Dominant 7 from France, Treatment Action Campaign, the Embassy of Finland, SAFAIDS and the Soros Documentary Fund. The films will be dubbed into at least 8 different languages and screened for communities. AIDS facilitators have also been involved in discussing these films with the communities who watch the documentaries. High-level overseas producers and editors came to South Africa to act as consultants during the pre-production and editing phases. The project has been tremendously successful with all films of a high quality.²⁹

Box 3.5. Acclaimed film-makers: Mozambique

Mozambique is home to João Costo, a prize-winning director of photography and reported to be one of the best in the region. The Africa Film and Television Directory names Orlando Mesquita and Gabriel Modlane as Mozambique's most promising directors. Sol Carvalho from Promarte has completed a commentary on domestic helpers, *Empregadas*, and also made a 50-minute feature *A Heranca da Viuva*, which tells the story of a widow accused of witchcraft.

3.2.3 The broadcasting environment in Mozambique

Approximately 0.4 per cent of Mozambique's 16 million population own a television set. Estimates of TV sets range from 100,000–300,000 but there is no taxation of TV sets and income from advertising is low. There is currently no specific legislation to guide the Mozambican broadcasting industry. There are three television stations in Mozambique, including the state-owned TVM (Mozambique Television), RTP Africa, which is the Portuguese channel and the religious television station Televisão Mira Mar.

²⁸ *Africa Film and TV Directory*, 2001.

²⁹ “Steps for the Future” web site www.dayzero.co.za/steps/project/ and “Successful launch of Steps Films”, *Sithengi Daily News*, 14 Nov. 2001. For more details of this project, see also the section profiling South Africa (section 4).

Box 3.6. Foreign productions: Mozambique

Foreign film production returned to Mozambique in 1996. Norwegian Television, NRF, made *The Successor* with a budget over US\$6 million. João Ribeiro participated in the *Africa Dreaming* series which was commissioned from South Africa. Portuguese director Fernando Silva shot his *A Tempestade da Terra*. In January 1997, the Swedish-Portuguese-Mozambican co-production, *Comedia Infantil* by Swedish director Solveig Nordlund was shot. During 2001, the Sony Pictures production of the life story of Mohammed Ali was partly filmed in Maputo.³⁰

Notwithstanding, the increase in the number of broadcasters in Mozambique has not resulted in increased work for independent producers.

3.3 Mauritius

3.3.1 Background

Mauritius has a well-known film industry that has been growing since 1995. Prior to this, there was only one known 35-mm film, by Ramesh Tekoite, entitled *Et le Sourire Revient*. The Mauritius Film Development Corporation (MFDC), formed in 1996, has assisted the industry with training and promotion. In 2000, trainees of the MFDC produced three short films: *L'Etrangère*, *Tracé* and *L'Artiste*. They have also been involved in a co-production with India, a fiction entitled *The Stone Boy* produced in the early 1990s in collaboration with the National Film Development Corporation of India. However, due to lack of adequate structures and marketing, the film was not successful.

3.3.2 Local production industry

Seven production companies in Mauritius focus on documentaries, corporate videos and the commercial market (ICV, Digital and Gems) but they rely on limited local equipment.

3.3.3 The Mauritius Film Development Corporation

The Mauritius Film Development Corporation is a government-funded parastatal established to import, export, exhibit and produce films. Its aims are to:

- establish relationships with foreign and international persons or bodies for the promotion of film activities;
- hold or promote the holding of film festivals to cater to the cultural and linguistic needs of the people of Mauritius;
- give such assistance, financial or otherwise, as the Board may determine, to persons or bodies engaged in the production or exhibition of films; and
- provide a one-stop shop for television and film production.

The MFDC runs an annual film competition. Most of the entries are short films of between 4–8 minutes. Industry players say that while the aims and objectives of the MFDC are laudable, there is very little expertise inside the institution and this hampers its

³⁰ *Africa Film and TV Directory*, 2001.

ability to play an effective role in the industry. At the time of writing this report, there was discussion about the possibility of replacing the MFDC with a Mauritian Film Commission that would focus on funding films and co-productions.

3.3.4 *The broadcasting environment in Mauritius*

Mauritius Broadcasting Corporation (MBC) manages the country's only national television station which runs one network. The free-to-air French channel, TV5 was launched in 1995, offering a mixture of English, French and Oriental programming. TV penetration is significant with 300,000 TVs for the 1.2 million population. Every household is said to own a television set.

Box 3.7. Acclaimed films: Mauritius

These include Khal Torabully's 1996 film *Les Travoules Des Vagues* that was entered in the 1998 Milan Festival.³¹

A hugely popular 13-part soap opera called *Neighbour Neighbour* was co-produced for television by the MBC and Virtual Studios.

Box 3.8. Foreign productions

The major focus of the Mauritius industry is on the location industry. In 2000, more than 300 foreign films were shot on the island, contributing to a total of approximately 5 million rupees to the economy. Indian film directors, in particular, have come to view Mauritius as an attractive location.³² This is principally because of the beaches in Mauritius, the hotels and the waterfront. The location industry is able to access skilled film-makers and equipment from South Africa and Kenya if these are not locally available.³³

3.4 Namibia

3.4.1 *Background*

Namibia has a developing film industry, with video and television well established. At Independence (in 1990), only two production companies existed – New Dawn (attached to the ruling political party, SWAPO) and INTV (with connections to the DTA). A few foreign companies used Namibia as a location and a number of independent film-makers worked on international projects such as the National Geographic. One of the first Namibian production companies to emerge at independence was Onland Productions with Richard Pakleppa and Bridget Pickering. They were able to secure a spacious old German house as their offices and received institutional support and also joined the regional coordinating body, SACOD. Their partnerships in the region led to them being co-producers on the EU-funded feature film, *Flame* set against the Zimbabwean liberation movement. This film enabled a number of Namibians to work for the first time on a feature production. This included, for instance, Jennifer Bassingthwaite (now with NIFA films) and Abius Akwape (now with Optimedia) as assistant director.

³¹ *Africa Film and TV Directory*, 2001.

³² MFDC web site.

³³ *Africa Film and TV Directory*, 2001

A noteworthy catalyst to the industry was the “Young Directors Choice” short film series produced by Ted Scott at the Namibian Broadcasting Corporation. The aim of this project was “to collect and preserve the oral history of the country and to create interest, dignity and pride among the youth of Namibia about their own cultural values”.³⁴ The Namibian Oral Tradition Project was a joint venture with NBC. The series offered multiple training skills (including scriptwriting, screen-acting, camera, sound and make-up) for the seven directors chosen to participate. Many film-makers in Namibia were involved in this initiative – some of whom are profiled below – including Cecil Moller (NIFA), Carla Hoffman (Mubasen), Bridget Pickering (On Land Productions) and Vickson Hangula (Homebrewed Productions). However, many of the participants felt frustrated at the end of the programme as the industry was too small to offer jobs and the NBC did no commissioning of independent productions.

Another boost to the local film industry was the production of *Namibia from the Inside*, co-produced by NBC and CFI. A small budget of N\$26,000 saw eight 26-minute documentaries in the series.³⁵

3.4.2 Local production industry

The industry is developing but remains very small, with many one-person operations. There is little specialization in the industry, with most producers and directors doing the editing, the scripts, the sound, the camera work, the production management and all other functions necessary to ensure a final product. Industry players say that there is no solid art directing, no character development and insufficient skilled technical people or trained cast. Film equipment (lights, cranes, dollies, etc.) is scarce and most equipment for foreign productions must be brought in from South Africa.

However, there is a newly established Film Commission, an annual Namibian Film Festival and the newly constituted Film-makers’ Association of Namibia (FAN). The recently established Namibian Film Commission which runs out of the office of the Department of Broadcasting and Information, has been welcomed by all, including NBC. The key expectations are that foreign productions will be attracted and regulated to contribute to local productions through the Film Fund; investment will be attracted to internationalize the industry and provide more job opportunities to Namibians; and the government will finance and encourage the production of local films and provide training. Foreign movies can be utilized as a training ground for local crew. The second expectation is that the Film Fund should distribute funds carefully. Vincent Xoagub, government media liaison officer acting as the secretariat, believes that a function of the Film Commission is also to provide support and information to the industry. It will do this through maintaining a database of skills, equipment and product and having up-to-date information on festivals and markets for Namibians to showcase their work.³⁶ Notably, the Film Act has hastened the development of the Film-makers’ Association of Namibia (FAN). As Vincent Xoagub explains, “The Film Act provides for direct representation of the industry in the Film Commission in the form of two commissioners who will serve together with three Government appointed representatives from various

³⁴ Ted Scott quotes in *The Namibian*, “Young Directors’ Choice sees the light of day”, 16 Apr. 1999.

³⁵ Nearly all these documentaries were screened at the 3rd Namibian Film Festival.

³⁶ Interview with Vincent Xoagub, Ministry of Broadcasting and Information.

line ministries”.³⁷ These are the Ministry of Environment and Tourism, the Ministry of Trade and Industry and the Ministry of Information and Broadcasting.

A new development initiated by Bridget Pickering and Ice Media Namibia will give a welcome boost to the Namibian film industry. A programme of screenwriting in collaboration with the media department of the University of Namibia, aims to develop local screenwriting skills through a structured programme of training writers in television drama screenwriting skills. The programme will allow a core group of writers to increase their technical knowledge with the aim of completing 26 scripts for the television series. Pickering explains this in her funding proposal:

Television dramas, soaps and feature films remain key genres for developing audiences in the local and international marketplace. Audiences are hungry for local stories and characters. Nurturing that audience has become critical. The establishment of two cinemas in the north of Namibia who are actively screening African product has proved this beyond any doubt. This training programme, in both its writing and production phases, is a practical step in developing film talent and providing local content to Namibian audiences. The programme provides a model for hands-on training and future employment in the Namibian industry. It is a multi-level strategy, which through emphasis on capacity building and training as well as work experience, viable product can emerge to create revenue with which to produce more programmes, series or films.³⁸

There are very few cinemas in Namibia, two in Oshikati in the North, one in Swakopmund and one complex in Windhoek with three cinemas.

A mixture of foreigners and black and white Namibians run Namibia’s production companies. The foreign film-makers appear to be commercially successful in highly niched markets. Below the focus is on some of the more established production companies, highlighting the cross-collaboration between players in the industry.³⁹

1. *On Land Productions*: Bridget Pickering (Namibian) successfully ran this company with Richard Pakleppa until her departure for South Africa where she is now with Ice Media. She has produced over 15 documentaries and five dramas in Namibia. As mentioned above, On Land Productions was an important player in the film industry since Independence, starting with the seminar series on the land question, *Whose Land* directed and produced by Richard Pakleppa and followed shortly after with a number of films addressing human rights questions and the social conflicts in Namibia. During the first half of the decade, On Land Productions developed partnerships in the region (resulting in the feature film *Flame*) and produced a number of films outside of Namibia such as *Shield Them from the Wind*, a documentary about women in modern-day Botswana. They also ventured into fictional projects producing two short films, the *Red Dress* and *Places in the World*, made by Zimbabwean director Ferraire Sibiso. Significantly, these dramas were produced with 95 per cent Namibian crew and actors, many of whom had little to no experience. An important opportunity opened up in 1995 with the *Africa Dreaming* series, allowing On Land to produce and direct one of the films which resulted in

³⁷ Frederick Philander, “First Round Battler for Film Posts”, in *The Namibian*, 30 July 2001.

³⁸ From the Ice Media Namibia “proposal to raise funds for the development of a screenwriting programme in Namibia in collaboration with the University of Namibia and with the support of the French mission for cooperation in Namibia”.

³⁹ All information from interviews with owners of the company, other film-makers and from articles in *The Namibian*.

Namibia's first fiction drama. The series was finally screened at the Rotterdam Film Festival and in the United States. The second half of the decade saw Pickering direct her own short film, and Namibia's first 35mm-fiction movie, *Uno's World*. The film had an all-Namibian cast and 90 per cent local crew shot on location in Windhoek.

2. *Mubasen Film and Video Productions*: Mubasen is a proprietary limited company with probably the best equipment in Namibia including an Avid Express, a betacam and a sound booth. Since this equipment was taken out with a bank loan, the company has tried to hire it out to local film-makers to help repay the loan. They have also offered courses but have found little interest. As co-owner Carla Hoffman says, "We wouldn't own all this equipment if we lived in South Africa. Namibia can't have a facility house." They have participated in many initiatives including *Mama Africa* and the "Steps for the Future" series. They also hire out their edit suite for the "Steps for the Future" project. They were involved in a GTZ-commissioned feature film on HIV/AIDS (90 minutes). The film is in Oshivambo and is written by a Namibian (Ebba Kalondo) now living in Kenya. Research for the production was undertaken in the north of Namibia by talking to people about HIV/AIDS. There is much excitement about this film because it is in a local language.
3. *NIFA*: Jennifer Bassingthwaite and Cecil Moller (both born Namibians) co-own this small but successful production company, registered in 2000. Jennifer Bassingthwaite works part-time as the Art Director of the John Mufangeyo Art School in Windhoek. Working with Bridget Pickering as producer, Cecil Moller made two short movies (one with Abius Akwake). He also worked on documentaries for CC Namibia about food aid (94). Two of his best-known works are a six-part comedy drama series (26 minutes each), called *Village Square* which went to the Fespaco film festival and *The Naming*, a workshopped feature film (67 minutes). The film was shown at festivals including the African section at Cannes. *For Village Square*, Jennifer Bassingthwaite was the art producer handling make-up and wardrobe as well while David Benade from NBC did the sound.
4. *Quiet Storm* (previously Afrinature): Dudley Viall (Namibian, previously from South Africa), an internationally acclaimed film-maker, runs Quiet Storm. Dudley Viall trained as a producer at the Namibian Broadcasting Corporation and worked with the Discovery Channel as a film-maker. He is a well-known cartoonist. He trained in Germany as a cameraman and is the recipient of many awards: Grand Prix-winner status at the 1996 Kwazulu-Natal film festival for his short film, *The Ghosts of Angra Pequena*, the 1999 Special Gecko Award winner and 1977 American Genesis Award winner for Outstanding Documentary and runner-up in the prix Leonardo film festival in Parma, Italy in the same year, for this work, *Cheetahs – Running for their Lives*. He is now working on a domestic violence series funded by the British government and a Namibian private sector company provided the shortfall for this series. Dudley Viall participated in the three-week UNESCO train-the-trainer course for which he received a certificate to train directors and camera people. Quiet Storm has also produced a full-length feature on domestic violence, *A Trust Betrayed*. The editing is outsourced. In the days of Afrinature, Dudley Viall worked on wildlife and environmental productions (Discovery and National Geographic), such as *Borrowed Earth*, an environmental documentary and *Animal Weapons*, on how animals protect themselves. He has made a number of films on the people of Namibia: *Rock of the Baboon*, a documentary dealing with the birth ceremony of a Himba leader, *Bushman du Kalahari*, depicting the traditional life of a Bushman hunter and *Himba*, a day in the lives of the Himbas.
5. *Homebrewed Productions*: Vickson Hangula (Namibian) is a central figure in the Namibian film industry and most well known for his internationally acclaimed film,

Kauna's Way. The film won the "best film shot on Video" award at M-Net's All Africa Film Awards (see Box 3.10). UNESCO paid for the director of photography, assistant director and cameraperson, and the French Mission contributed towards the movie. Vickson Hangula did a short practical television director's course through NBC, which allowed him to make his first short film, *In Difficult Times*, which depicted the liberation war in Namibia. Other films by Vickson Hangula include *Okapana* (documentary), *Picture This* (short fiction) and *The Worrier*, a 75-minute drama on HIV/AIDS issues, all shot on video. Vickson Hangula and Abius Akwake (Optimedia) are on an organizing committee chaired by Uazuva Kaumbi (Chairman of NBC) and including Namibian playwright Frederick Philander and NBC staffers, in the translation of Sam Nujoma's book *Where Others Wavered* into a movie script.

Box 3.9 *Kauna's Way*

"I am convinced that the gods are at last smiling on me as an independent film-maker as well as on the struggling Namibian industry ... writing and directing *Kauna's Way* was not moonlight and roses. The whole process of making the movie demanded strict individual discipline and artistic focus as well as other, personal sacrifices." Vickson Hangula resigned his job as senior librarian assistant at the Polytechnic of Namibia (a secure job of 5 years) even before all the funds had been secured. "*Kauna's Way* proved local and continental sceptics totally wrong with regard to the quality of film-making in Namibia. Local works have in the past been considered inferior. The lack of good local scripts and sufficient funding contributed greatly to this myth." Hangula welcomed criticism of his script: "I voluntarily submitted the script of *Kauna's Way* to various people for criticism. In the end I was assisted in the writing of the work by a Swazi woman scriptwriter. This contributed to the unique quality of the film."⁴⁰

3.4.3 *Namibian Film Festival*

The Namibian Film Festival was a biennial event until 2000; in 2001 it became an annual event. The organizers plan to maintain this. It runs for two and a half days and, until 2001, was funded by the Franco-Namibian Cultural Centre which also provided the location, the equipment and all the marketing and promotion. NBC assisted with promotion and equipment and also sat on the committee. Other members of the committee included a film producer, a representative from the FNCC, from French cooperation and now the Ministry of Broadcasting and Information. The committee plans to expand the festival to include regular events throughout the year and to ensure more product. The festival had 32 products for 2001 ranging from documentaries and fiction to shorts and series. The film festival includes a special guest film-maker from abroad segment. The key success of the festival is that it has raised more awareness in film-makers about their industry, what exists and what is possible.

3.4.4 *The broadcasting environment in Namibia*

The Namibian population of fewer than 1 million people is covered by M-Net, Multichoice, DownLink, Deukom and NBC. Broadcasting licences are only available if the broadcaster is in partnership with a Namibian. The Namibian Communications Commission (NCC) established in 1992 regulates the broadcasting industry. Telecommunications in Namibia will be fully open to competitors in 2004 with a new Telecommunications and Regulatory Policy Framework already in place. This is expected to pave the way for a new independent regulator covering both telecommunications and

⁴⁰ Interview with Vickson Hangula, "Kauna's way makes history", by Frederick Philander, *The Namibian Weekender*, 16 Feb. 2001.

broadcasting.⁴¹ Outside of South Africa and compared to the southern African countries, Namibia has the fastest growing telecommunications network, offering Internet and computer services of all ranges.

Box 3.10. Renowned film-makers: Namibia

Cecil Moller and Bridget Pickering produced the Namibian contribution to *African Dreaming*. Pickering was chosen in 1999 as one of six female African film-makers to direct a short story for the *Mama Africa* series, *Uno's World*. Cecil Moller's video, *The Naming* (1997) was shown in Milan (1998), SAFF (1998) and Cannes (1999). Vincent Hangula's *Kauna's Way* (1999), shot on video and produced by Bridget Pickering, received excellent reviews at SAFF 2000 in Harare, *Bues'd'Afrique* in Montreal, the African Diaspora Film Festival in New York, and the Nairobi Film Festival, the Amiens.

In recognition of the constraints facing the broadcaster (the shortage of producers, assistant producers and production assistants), NBC is developing new commissioning procedures and policies to interact more effectively with local film producers and has set aside a small budget for 2002 for commissioned material. It is the belief of NBC that programme commissioning will contribute to an improvement in the quality, quantity and regularity of local programmes and also help NBC to fulfil its objectives. These new developments are indicative of a growing and vibrant film-making sector in Namibia. NBC's controller of TV programmes, Aune Shipanga, has had a deliberate strategy of showing one African movie a week (since March 1999), of flighting (for in-flight entertainment) local content when available, of entering into co-productions with local film-makers and of promoting women through the gender desk. A total of 75 per cent of NBC funding comes from government with the rest made up from advertising, TV licences and other assets. Until now, they have not had the budget to commission work from independent producers. It is noteworthy that NBC struggles to source African movies for their weekly slot. After a very short time, they had exhausted the Film Resource Unit catalogue. They source from Zimbabwe, from the DRC, Ghana and Burkina Faso and have recently received sponsorship to go to Nigeria to scout for movies. A gender desk was established as part of the newsroom in 2001 to focus on women and children, particularly those experiencing poverty, domestic violence, HIV/AIDS, student and health issues.

Box 3.11. Foreign productions: Namibia

Namibia is a favourite site for South African commercial producers and overseas clients. The recently established Namibian Film Commission is planning to assist foreign film makers, through a website showcasing locations and equipment suppliers and listing local film production companies and local technical skills. It will also need to play a role in the emerging tension between Namibia and South Africa over pay. Local film-makers reported variations of N\$340 paid to crew from Namibia compared to those from South Africa.

The draft proposal on new commissioning procedures has met with some resistance. The initial idea was to use some of the 2001 budget to commission a few programmes as a pilot. The co-productions entered into with local producers in the past have enabled producers to use facilities such as an AVID editing facility. The French government donated this piece of equipment⁴² on condition that the broadcaster made it available to independent producers. Film-makers in Namibia were not as positive, with many arguing that the equipment has not been maintained and that the co-productions are not really a good deal for producers. Shipanga was adamant that the proof of the effectiveness of their

⁴¹ Information from draft document, "Broadcast Environment" prepared by MISA, 2001.

⁴² A bilateral agreement between Namibia and France has resulted in substantial benefit to the film and television industry involving both the French Mission and Canal France International.

interaction with the local independent producers was how many of them used NBC facilities for their productions. Among these are Vickson Hangula (for *Kauna's Way*), Cecil Moller (for *The Naming*), Bridget Pickering (for *Uno's World*), the French Mission (for *Namibia from the Inside*), the NBC Norwegian project, Namibian Oral Traditions and the French Mission's Young Directors Choice.

3.4.5 Supportive organizations

The Franco-Namibian Cultural Centre (FNCC) has played a central and significant role in the film industry in Namibia. The FNCC was established by an agreement between the governments of Namibia and France shortly after Independence (31 July 1991). Its objective is to give meaning to the Namibian government's decision to break away from its former isolation of cultural circles and open up to the rest of the world, particularly the francophone areas. The centre offers French language cultural activities, organizes French language courses, lectures, provides film or video shows, theatre plays and exhibitions. It runs an art workshop programme, for instance, with an opportunity for exhibition. The centre also has a resource centre (mediatheque) which includes study rooms and more than 5,000 documents, audio tapes and CDs and a videotheque including 1,500 video tapes from fictions, documentaries, pedagogical tapes, dance shows, one-man shows and videos for children, either in French with English subtitles or in English with French subtitles.⁴³

The FNCC is based close to the economic and commercial heart of Windhoek and across the way from the National Theater of Namibia and the Namibian Art Gallery, creating something of an emerging cultural district.

Through its mission to contribute to the awareness and development of Namibian cultural identity, it has given significant support to Namibian film producers and film directors. It has been able to do this through its equipment (DVDs and VHSs) and venue (a 57-seater cinema) as well as organizational ability, the assistance to the Film Festival, the promotional and marketing material as well as the emerging database of all players in the Film Industry.

The significance of their presence in Namibia is the FNCC's understanding that it is there to play a supportive rather than an organizing role. The FNCC, for example, have created a database of all equipment suppliers and their costs to enhance the efficiency of the organization of Music Day. In their publication on the Namibian Film Festival, for instance, they included in 2000 the beginnings of a film and TV directory including company name, address, telephone and email details listed under production companies, technical crew, training, broadcasters, advocacy, government and French Cooperation. They expanded this listing for the 2001 publication to be comprehensive of the industry and available on a live database. The Film Commission intends to provide this service in the future.

⁴³ Interview with Damien Morel, cultural officer of the FNCC; and the FNCC document, "Grand Opening of the FNCC" which was published to coincide with the opening of the new imposing building housing the FNCC in Dec. 2000.

3.5 South Africa

3.5.1 Background

South Africa has the biggest independent production sector in the region. A study conducted for the Department of Arts, Culture, Science and Technology (DACST) in 1998 entitled the Cultural Industries Growth Strategy for the Film and Television Industry⁴⁴ highlighted a number of positive developments in the industry in South Africa. These included:

- deregulation of broadcasters following 1994 that has opened up opportunities for the industry;
- ownership structures had changed significantly during 1997;
- the major media company, Primedia, was acquiring interests in film and television production, developing a network of production companies to source material and establishing a new focus on content development and production;
- the coming together of production companies and event-management companies under the company African Media Entertainment (AME), which also had an interest in content production, was seen as heralding a new more consolidated industry; and
- a new free-to-air television station, eTV, was set up, leading local producers to assume there would be greater opportunities for local producers due to local content quotas.

The opportunities associated with these developments were seen to be:

- the possibility of greater levels of private sector funding from big media companies;
- a more consolidated industry where media companies such as Primedia which owned cinema chains as well as production houses would ensure that local productions actually got exhibited;
- more opportunities for local television production; and
- greater access to international distributors, co-production partners and exhibitors due to the higher level of credibility and good contacts in the bigger media companies.

In the mid-1990s film-makers and producers expected that deregulation would open up the market and that new opportunities would emerge from the increased use of local content. However, by 2000 it was clear that this was not the case.

3.5.2 Evaluation of the film and television industry, 2000-2001

In re-evaluating the state of the industry in 2001, the following issues emerged:

- both AME and Primedia had difficult years in 1999 and 2000 with share prices falling;

⁴⁴ This report was authored by Natalie Jacklin and edited by Avril Joffe.

- both companies attempted to release South African feature films, such as *Reasonable Man*, which did not do well on the cinema circuit;
- changes in the broadcasting environment did not result in the kinds of opportunities envisaged and eTV was accused of not reaching its local-content quotas;
- the period between 1998 to 2000 reflected increasing drops in cinema attendance from 19.5 million in 1998 to 16.3 million in 2000⁴⁵ levels leading to Ster Kinekor (a major distribution agency) closing down 90 screens;
- as a result Primedia and AME have given up producing purely local films;
- AME has stated that they will continue to provide the infrastructure for foreign film-makers but will not invest in South African productions;
- in July 2000, AME released a statement that they planned to refocus on their core businesses of broadcasting, filmed entertainment (in the form of coordinating international film productions in South Africa) and live entertainment;
- Primedia has also refocused on their core business of advertising and marketing and radio broadcasting; and
- Primedia Pictures produced one feature film (*Boesman and Lena*), a co-production with Pathe Image from France, three short films and two documentaries. AME produced *A Reasonable Man*, *Inside Out*, *High Explosive*, *I Dreamed of Africa*, *Kin* and *Hoofbeats* through their production division, Moonlighting.

It was hoped that the new developments in the South African film and television industry, as reported in 1998, would create opportunities for the development of the industry in the region and as a gateway to international players. This has not been fully realized and the industry continues to be characterized by high levels of fragmentation in the value chain and relatively low levels of local production. However, in comparison to the rest of the region, South Africa is far advanced and the only SADC country with a relatively developed film industry, containing most of the infrastructure and resources for the industry.

The high levels of optimism of a few years ago seem to have subsided significantly and new strategies for growing the industry are being sought. The feature film industry in South Africa is very small with between one and two feature films being produced a year.⁴⁶

The National Film and Video Foundation (NFVF) is a positive development for the industry and has initiated a number of activities and programmes, including establishing co-production agreements with the member states of the European Union. A significant development was announced at the symposium involving the Industrial Development Corporation (IDC) collaborating with government in conducting a major survey of the SMME sector in 2001 to determine the levels of capacity and infrastructural needs and requirements. Associated with this is the decision by the IDC to allocate R200 million to the film and TV industry. This investment of capital into the film industry comes with a focus on projects rather than companies, co-productions rather than exposure to 100 per cent of the risk and stringent checks and balances. As Sam Bhembe of the IDC explained:

⁴⁵ "Silver screen battles to regain sparkle", *Sunday Times*, 20 May 2001.

⁴⁶ *ScreenAfrica*, June 2001.

“We view the film industry as an important investment opportunity but would like to encourage other financial institutions to invest so that the industry can develop.”⁴⁷

3.5.3 *The local production industry*

The Cultural Industries Growth Strategy conducted for the DACST revealed that there were between 400 and 550 production companies operating in the country during the late 1990s, with a production sector worth about R1.3 billion. Approximately eight feature films were being produced in the country in 1997. Production is said to have decreased in South Africa during 2000 due to fragmentation of the industry as noted above. In late 2001 Anant Singh released the latest Leon Schuster movie, *Mr Bones* reducing box office takings of the simultaneously released (and highly successful) *Harry Potter*.⁴⁸

Sasani studios in Johannesburg is the biggest post-production and facilities house in southern Africa and the only one able to offer post-production services for feature films. Since January 2001, Sasani has provided the systems solution and live broadcast facility to beam the African Broadcast Network (ABN) signal into several countries. The Sasani group is listed on the Johannesburg stock exchange and includes the following companies:

- Video Lab – located in Johannesburg and Cape Town offering film and video post production, animation and video to film transfers.
- Movie Camera Company – which supplies equipment offering the entire Arriflex range of equipment.
- Film Lab – which is the leading film processing laboratory in South Africa specializing in film editing, processing and printing facilities with full accreditation as a Kodak Imagecare facility.
- The House Next Door – produces animation, including character animation.
- The Worx Digital Graphix – special effects division of the Video Lab (visual effects, animation and film recording).

The profiles of selected successful projects are highlighted below:

1. *Educational drama*: South Africa has developed a particular expertise in the production of drama for television that has an educational angle. The *Soul City* series, for example, is commissioned by a donor-funded NGO. The viewership figures grew by 28 per cent for the fourth series, which had been extended from 26 minutes to an hour per episode.
2. *Electronic media promotion*: South Africa is developing a competitive advantage in electronic media promotion. Rapid Blue, a Johannesburg based production house won four gold and two silver awards in the prestigious PROMAX awards held in Miami Beach in June 2001, recognized worldwide as the highest accolade for electronic media promotion and marketing professional.

⁴⁷ Comment at the Film Finance and Investors Conference at Sithengi, Nov. 2001, printed in *Sithengi Daily News*, 15 Nov. 2001.

⁴⁸ “Schuster’s *Mr Bones* premieres”, *Sithengi Daily News*, 14 Nov. 2001.

3. *Educational documentaries*: South African production companies specializing in educational documentaries are being acknowledged internationally. An independent South African production company, Synergy Films, for instance, was commissioned to produce a documentary on the country's response to the AIDS crisis for screening at a UN General Assembly Emergency session on AIDS in New York 27 July 2001.⁴⁹
4. *Commissioning Briefs: Steps (Social Transformation and Empowerment Projects) for the Future*: This project, documented in section 3.2, represents an important opportunity for independent film-makers in the region. The project, focusing on HIV/AIDS, was launched in November 2000. There are 30 African film-makers commissioned to make documentaries for what is probably the largest international television co-production ever.⁵⁰

3.5.4 The broadcasting environment in South Africa

Television was introduced in South Africa in 1976 and until the mid 1990's the South African Broadcasting Corporation (SABC) functioned as South Africa's *state* broadcaster with a virtual monopoly of the broadcasting services. The SABC is now the official *public service* broadcaster with the aim of providing protection for local cultures to reflect reality from a unique local perspective. The Independent Communications Authority of South Africa (ICASA) has taken over the regulation of the broadcasting sector. Since October 1988, a free-to-air television station called eTV (co-owned by Times Warner) started broadcasts. The first private subscription channel, M-Net, started broadcasting in South Africa in 1986. Since then, the government has approved three levels of broadcasting – public, private and community. Penetration of TV in South Africa is estimated at 14 million adults who watch SABC TV daily. Almost 50 per cent of all programmes transmitted are locally produced. M-Net has over 1.23 million subscribers and focuses on movies and sport.

Local-content quotas were imposed on broadcasters in 1977. The National Film and Video Foundation (NFVF) has proposed to increase local content (or South African productions) on public broadcasting to 50 per cent over a period of 10 years. Local-content quotas for the private channel, M-Net is less onerous at 5 per cent although it must reach 20 per cent in the two unencoded hours (or "open time"). New private television broadcasters such as eTV must reach 20 per cent in the time slot of 5pm to 10pm. Actual local content of prime-time broadcasts was established in a recent content survey as 51 per cent for SABC TV and 45 per cent for eTV.⁵¹

⁴⁹ *ScreenAfrica*, Aug. 2001.

⁵⁰ Jann Turner. "Steps in the right direction", *Mail & Guardian*, 5–11 Oct. 2001.

⁵¹ Content analysis conducted by Struwig and Conradie, 2001 and referenced in DACST, 2001 "All Talents Count..." p. 29.

Table 3.1. Summary of the film and television industry in other SADC countries⁵²

Country	Local production industry	Acclaimed film-makers	Foreign productions	TV industry regulation
Angola		Several: <i>Les Oubliées</i> (1997) by Anne Laure Folly and Zeze Gamboa's <i>Dissidencia</i> (1998) qualified for the 1998 Milan Festival. Folly's <i>Le Gardien des Forces</i> won the first prize of the Cultural and Technical Cooperation Agency in Montreal in 1992.		Angola's Constitution states that the media cannot be subject to political, ideological or artistic censorship, but difficulties exist with enforcement.
Botswana	Depends mainly on wildlife documentaries and locations.		Foreign productions use the Okavango Delta and the national parks for location shooting, using Botswana's experience production support with assistance from Zimbabwe and South Africa.	The new Communications Bill (1999) established separate broadcasting, accreditation and registration boards and a press council. The Minister of Information is in charge of all these boards. One independent TV station, GBC in mid 99 and MultiChoice, but no state-run broadcaster. 25 television sets for every 1,000 people.
Democratic Republic of Congo	Limited film-making industry has declined. A number of Congolese directors have made films with donor funding particularly from Europe.	Mwenze Ngangura's <i>Pièces d'Identité</i> won several prestigious awards including the Stallion de Yennenga at FESPACO in 1999.		The Ministry of Information controls the 4 channels of RNTC (Radio-Television Nationale Congolaise). Since January 2001, a new private channel, Canal Tropical Television has been launched in the capital, Kinshasa. Three other independent broadcasters exist in the country (RAGA and Antennae A in Kinshasa, and Solar Energy in Lubumbashi).
Lesotho	Very few film-producing companies and film-makers in the country. Two video editing facilities in Maseru.	Don Edkins		Ministry of Communication regulates broadcasting

⁵² *Africa Film and TV Directory*, 2001.

Country	Local production industry	Acclaimed film-makers	Foreign productions	TV industry regulation
Malawi	No film-producing companies and no known film-makers as yet.			During one-party State, the Malawian Broadcasting Corporation broadcast no TV, only radio, owned and controlled by the government. The first terrestrial free-to-air television station, TV Malawi, was launched on 1 April 1999 and broadcasts to the main urban centres. Previously, only foreign broadcasts via satellite were available. Pay television service, MultiChoice Malawi was launched in May 1998.
Seychelles	The sole film-producing company has closed. The island has excellent facilities built up from tourism.			The island has one television broadcaster, the publicly owned Seychelles Broadcasting Corporation (SBC).
Swaziland	No film industry and little video activity. Swazi TV has the only video editing facilities in the country apart from the Ministry of Agriculture.			Swaziland Television Broadcasting Corporation provides only television service. It was established in 1978 as a private concern but taken over by Government in 1986.
Tanzania	Lack of funds is the reason for a poor local industry. The black and white film laboratory installed at the Audio Visual Institute was closed due to lack of funds. The Tanzania Film Corporation, which makes documentaries, has also produced at least 3 full-length feature films and distributed these on national cinema halls. Several video studios are producing for TV stations.	1996 Tanzanian feature <i>Maangamizi</i> , was directed by Ron Mulvihill and Martin Mhando and screened at the 1997 FESPACO festival. Tanzania was also chosen to participate in M-NET's New Directors Africa initiative. Zanzibar International Film Festival established in 1998 is a festival of the Dhow countries to celebrate the culture of these countries through film, music arts and dance.		High local content requirement ensures strong programme production, although of poor quality. Participation of private players in broadcasting was set by Tanzania Broadcasting Services Act (BSA) of 1993.

Country	Local production industry	Acclaimed film-makers	Foreign productions	TV industry regulation
Zambia	No film industry. No film-producing companies and no significant film-makers. The ZNBC and Zambia Information service and some private firms occasionally produce TV plays and documentaries. There are a number of video-production companies. Locals enjoy foreign films.			The Zambian National Broadcast Company (ZNBC) is a state broadcaster and there are three other television stations including MultiChoice Zambia (a joint pay-TV venture between ZNBC and MultiChoice Africa), Trinity (a foreign Christian values operation) and CSAT, an MMDS broadcaster to Lusaka.

Conclusion

Many countries do not have the entire value chain within their borders. For example, the Mauritius film and television industry is mainly based on the use of their country as a location for productions. Only limited beginnings occur (from local film-makers), with the majority of work being located in the production part of the value chain. Beginnings, pre-production, post-production, circulation, audience reception and feedback all happen in the country of origin rather than the country where the production is being filmed. This clearly has implications for the amount of income likely to be generated in the location country. The more of the value chain that can be located in the country, the greater revenues that can be captured. It is also important which parts of the value chain are located in which country. For example, greater earnings are reaped in the circulation and delivery mechanisms. Hence, the Hollywood industry product is exhibited in Africa, where broadcasters and cinemas may also make money on it, but the main profits make their way back to America. The country in which copyright is held benefits the most from a film or television production. Clearly strategies to improve scripts and link these to producers and distributors will benefit the regional industry enormously and contribute significantly to regional economic development. It is to an overall evaluation of the regional industry that this report now turns.

4. Evaluation of the film and television value chain in the region

Introduction

The value chain for the film industry is very similar to that of the television industry although the art of writing scripts for television or full-length feature films differs. In addition, the distribution and delivery of television products in the broadcast environment is different from the cinematic and video distribution and exhibition environment. In this report, we refer generally to the film and television industry together. Each segment of the value chain is described below, followed by an evaluation of the segments in the region as a whole.

4.1 Beginnings

The beginnings process in the film and television industry refers to the context or inspiration for a story. This spark of inspiration results in a script, which could be commissioned by a broadcaster (which is then subjected to a bidding process) or production company before being written or sold to them after being written. The story could be based on a book and adapted into a script or written into a script immediately.

Funding for the production could be included at this point in the value chain or in the production phase, depending whether financing can be acquired before the script is written, after the script is written or just before production starts. Sources of funding include broadcasters, distributors and government as well as private sector, individual investors and non-governmental organizations.

During the beginnings phase of production stories are developed. Most important from a commercial perspective is the ability to turn the story into a good script.

There are a number of scriptwriting development initiatives in the region. Examples of the more established of these include:

- The African Script Development Fund, based in Zimbabwe, aims to secure the production of at least three African films per annum by providing script writing training.
- The South African Scriptwriters Association, which represents scriptwriters in South Africa, was established in 1974 to bring working scriptwriters together. Based in Johannesburg with a chapter located in Cape Town, it represents about 160 scriptwriters and holds workshops on an ad-hoc and ongoing basis. It also advises the South African Broadcasting Corporation on contract law, provides training on scriptwriting and presents workshops on script and copyright.
- The South African Scriptwriters Laboratory (SCRAWL) runs scriptwriting workshops in South Africa. It was launched in November 1977 and originally funded by AME who had a “first-look deal” with SCRAWL. In this way 90 days after the end of the workshop, AME could make a first offer to the scriptwriters who were under no obligation to accept the offer. International readers select participants on the basis of scripts submitted which are then workshopped. The format is based on The Sundance Institution in America initiated by Robert Redford as a scriptwriter training laboratory and the Performing Artists Laboratory in the UK.

Box 4.1. The African Script Development Fund

The African Script Development Fund identifies talented African writers to:

- develop African screenplays;
- create opportunities for co-productions in Africa;
- promote collaboration between scriptwriters and directors/ producers; and
- also, secures the production of three quality African films annually.⁵³

One of the criticisms of scriptwriter development in the region is that it provides good-quality scripts but these are often not transformed into viable productions. Therefore, people trained in these programmes do not always emerge into the industry. Hence, there is a need to link training in script development with directors and producers in order to explore linkages and assist the producer to understand and better interpret the scripts. It is also important that scriptwriters take cognizance of the producers' requirements to turn the written word into a moving image. In the Recommendations section of this report possible interventions are suggested to address the issue of what SACOD calls the collaborative art of film-making.

Access to funding is one of the biggest hurdles to the development of the film and television industry in the region. Most funding comes from donor agencies with very limited funding from the private sector and government. Most production is currently dependent on donor funding. Some concerns have been raised by SADC film-makers about this reliance on donors: they believe that the type of stories that are told tend to be confined to the agenda of the donors rather than the development needs of the region. Most national governments in the region have a long list of social and economic priorities and lack the resources to invest in an industry such as film and television, which requires such high levels of capital investment. The southern African industry also does not have a reputation for producing productions that generate big returns, making it unattractive to private investors. In addition, film-makers themselves are often not skilled in brokering deals and finding creative ways to generate funding for their film and television ventures. Many interviewees for this report pointed to the need for training producers and film-makers in areas such as deal-making, writing up business plans and presenting financing proposals to potential financiers. These are elaborated upon in the Recommendations section.

⁵³ www.icon.co.zw/asdf

4.2 Production

The production part of the film and television value chain is divided into three distinct phases:

- **Pre-production** refers to the planning phase of the production from the creative, technical, artistic and photographic perspective. It includes location scouting, production accounting as well as finding casting and crewing agents who in turn find the actors, actresses and crews for the production.
- During **production** the actual shooting starts. This includes the actors, wardrobe people, make-up and hairdressing people, script supervisors, location manager, lighting and sound specialists, camera crews, grips, set constructors, stunt people, special effect experts, animators, transport and accommodation, photographers and studios.
- Once production is completed, the tape is sent to **post-production** facilities, which are responsible for editing, inserting computer effects, animation and graphics, sound effects, music and titles.
- The producer and sometime the directors are included in this process from beginning to end. The producers are responsible for overall coordination of the production as well as all business deals. The director is responsible for the creative input and management of the process.

Key issue: The film and television industry in South Africa has inadequate access to private and public sector funding and there are not enough good scriptwriters.

The southern African film and television production industry is in its infancy. It is not currently commercial in nature and is mostly reliant on donor funding.⁵⁴ There is a huge disparity in the production capacity of African countries.⁵⁵

The level of state control of the broadcasters and censorship practices in different countries also has an impact on local production.

4.2.1 Three parties drive production

A. *Television:* South Africa is the only SADC country in the region where productions are commissioned on a regular basis from independent producers. The criticism remains that broadcasters do not commission enough local work, that their processes are unfair and skewed to the bigger players in the industry and that the government regulations and global industry combine to make local productions far too expensive compared with international offerings. In the rest of the region, broadcasters may commission work on a very limited basis.

While interviews with SACOD and FRU suggested that the relationship between producers and broadcasters was positive in Mozambique, producers themselves held different opinions. Mozambican broadcasters do not have budgets for commissioning of work. Until quite recently, producers wishing to have their material broadcasted were expected to pay the broadcaster. While this seems outrageous from an independent producer's perspective, the broadcasters are very cash-strapped and are aware of the producers' ability to attract donor funds. They believe that they should also enjoy the benefits of this donor funding if they are expected to broadcast the productions. One producer in Mozambique, Promarte Productions has had success in working with the broadcasters. They have recently co-produced 32 hours of television with TV Mozambique (TVM), which consisted mostly of environmental programmes. In this arrangement Promarte used the

⁵⁴ Chris Kabwato of SADO, interviewed 24 May 2001.

⁵⁵ Interview with Mike Dearham, FRU, 14 June 2001.

broadcaster's equipment and provided the rest of their budget from donor funding. However, none of the other producers seem to be doing any substantial work with the broadcasters. Most of the television productions are done in-house.

The Zimbabwe Broadcast Corporation has, very slowly, started to develop co-productions with independent producers. In October 2000, the first-ever co-production was between ZBC and the production company Creative Nation. The series, *Waiters*, which was initially comprised of five 26-minute episodes, explores racial issues. The production would have cost the production company, US\$84,000 to produce for a set of six episodes. However, the ZBC contributed the equipment and resulting in the production only costing US\$27,000. Under this agreement, the ZBC has territorial rights while the production company maintains regional and international rights. The production company also gets all proceeds from the sale of the video that will be produced for the Zimbabwean market. The next co-production planned is Godwin Mawuru's *Shades of the City*.⁵⁶

Key issue: Most broadcasters in southern Africa have limited budgets for the commissioning of productions from independent producers. It may follow that the relationship between broadcasters and independent producers needs to work differently in the SAADC region than is the norm in developed countries.

B. *Donor organizations:* The independent film sector in the SADC region concentrates energy and money on social issues such as teenage pregnancy, AIDS and women's empowerment. Often this agenda is set by the donor agency, forcing the independent producers to work within certain paradigms in order to receive funds. The Zimbabwean director, Tsitsi Dangarembga has been quoted as saying "*Everyone's Child* is not the film I wanted to make. I didn't want to make another AIDS film on Africa. I was not empowered to make the narrative I wanted to make."⁵⁷ Donor funding has assisted in some cases to break taboos on certain issues but only the taboos deemed important by the donors are addressed. Some donor organizations simply wish to commission documentation about their work in a country that would result in an in-house donor organization product rather than a programme with broadcast potential.

In Namibia, there are instances of donor funding offering interesting possibilities and severe constraints. One producer, for instance, undertook to do a series of five films for UNICEF on people living with HIV/AIDS. Years of research, difficulties in subject area and upfront money have resulted in only two completed films. This project has frustrated the company and contributed to its current financial difficulties.⁵⁸ In contrast, another producer has been able to work on a significant number of donor projects, particularly on domestic violence, and where necessary has been successful in raising private sector funding to supplement.⁵⁹ It appears that many production companies struggle not only to prepare a budget appropriate to the expected and desired output of the project, but also negotiate for revised budgets with donors once difficulties arise. These aspects of production management would be a core focus of any support measures made available to the industry.

⁵⁶ "New Day for Zimbabwean TV?" *African Film and TV*, Feb.–Apr. 2001.

⁵⁷ "Fifty Years of Film-making in Zimbabwe", Kedmon Nyasha Hungwe, Centre for Educational Technology, University of Zimbabwe.

⁵⁸ Interview with Carla Hoffman, Mubasen, Namibia.

⁵⁹ Interview with Dudley Viall, Quiet Storm, Namibia.

It should also be acknowledged that the control of donor agencies over the production is very much dependent on the standing and management ability of the producer and the nature of the production. Clearly in the case of producers who have been commissioned by a donor agency to develop a production about the donor's work or a relevant social issue, the donor agency has complete control over the production and will want to see and assess progress in the production.⁶⁰

This is not the case for producers such as John Riber in Zimbabwe and Lucinio Azevedo in Mozambique, who develop their own project proposal and draw up budgets before approaching any donor agency for funds. In other words they treat the funders as they would any other possible financier. They also have a good relationship with the donor agencies and are, therefore, able to manage the production very independently.⁶¹ John Riber made the following point: "I can't imagine making any other types of films than I am currently producing, even if I was using different funding sources. These are the types of films I enjoy watching." It should also be acknowledged that any agency financing a film production, be they private sector funders or government, may also impose certain criteria that film-makers regard as restrictive, so this is not necessarily only an issue for donor agencies.

Accusations of racism have been directed at how some donor organizations choose their production company. It has been argued that "production resources in the independent sector are unequally distributed with white nationals and ex-patriots being the owners of disproportionately high resources".

Key issue: Donor funding currently plays an essential role in the film and television industry. However, this type of funding may place some limitations on the creativity of film-makers, as well as exclude some potential film-makers.

- C. *Foreign films:* The choice of Africa for location by American and British producers has resulted in the development of a location industry in countries such as Mozambique, Mauritius, Zimbabwe (less so now), South Africa and more recently in Namibia. It is a contentious issue both amongst local film directors and producers and the government in South Africa. While it brings in much needed foreign exchange, creates jobs and provides work to technicians in the industry (see Box 4.1) it does not add to the number of locally produced films or provide work for the country's directors and producers. Guy Knockels of Namib Films was quoted as saying that foreign films create cycles of boom and bust for the Namibian film industry: "Our industry has five-year cycles, especially when it comes to shooting feature films. We're the most sought-after location for a few years, after which our entire industry slows down, waiting for the next boom."⁶²

⁶⁰ Interview with Francisca Serrao, Iris Imaginações.

⁶¹ Interviewee John Riber.

⁶² Quoted in "Sand, sand, sand and more" by Trevor Fabron, *Film SA perspectives on the industry*, Edition 1, 2001.

Box 4.2. Foreign injection from Bond-style movies

A film entitled *Manhunt* will be shot in Cape Town and Vienna. It is a James Bond-style television movie with high action. Philo Pieterse, CEO of Philo Films, is handling the filming and production and estimates that his company would spend more than R8m during the 36 days of filming. The Cape Town film office estimates that for every R1 spent by the film company, R3.50 will be spent by supporting industries. This means the movie will inject about R36 million into the regional economy and market Cape Town to an international audience. In addition the shoot will involve 150 fixed crew, 2,100 local extras and 200 indirect crew.⁶³

In South Africa there has been a call for regulation as increasingly foreign producers have come to the country with “complete freedom to bring in their own staff and facilities which threatens the utilization of local resources”.⁶⁴ This results from the relaxation of work permit requirements and the possibility of a 40-hour working week. Many believe that fewer working hours will not create more jobs in the sector but instead will escalate costs, with a negative effect on growth. Industry players warn of economic stagnation in the sector. The Independent Producers Organisation has argued that, “We have to regulate and monitor. We have to protect local industry against people who don’t pay their bills, bring in their own artists and low-level staff and who disregard the environment.”⁶⁵

Work permits were used, in the past, to protect local people’s access to foreign film productions. These were done away with, as was the Consultative Committee that regulated the permits. The ex-chair of this committee explained that while they are not advocating a return to the idea of work permits, they are in favour of knowing “who is coming in, and what local resources they use”.⁶⁶

Box 4.3. Case study: Films cross-borders

Title: *High Explosive*

Location: Zimbabwe

Subject: Landmines in Angola

Co-production between Michael Games’ company Save the Animals (SA), Towers of London Limited and GFT Landmine Film Inc. (Canada)

Award winning South African DOP: Des Burmeister (SASC)

Canadian Director: Timothy Bond

Post-production editing: The Film Lab in Johannesburg, South Africa

Stars: UK actor Patrick Bergin, South African actor Ian Roberts⁶⁷

Ironically, in Mozambique producers have similar concerns, some of which are directed at South African companies. During 2001, the Hollywood production *Ali* was filmed in Mozambique. The production company chose a South African based company to facilitate their production. As a result, the cast and crew were all from South Africa and America. Four hundred people were employed on the production. Of these, 100 were

⁶³ “Bond-style movie to inject about R36m”, *BusinessDay*, 14 May 2001.

⁶⁴ *ScreenAfrica*, Nov. 1999.

⁶⁵ IPO’s Desiree Markgraaf, quoted in *ScreenAfrica*, Nov. 1999.

⁶⁶ Rod Steward, ex-chair of the Consultative Committee, *ibid*.

⁶⁷ “An explosive shoot”, *ibid*.

from Mozambique and only two were from the film and television industry. The remaining 98 were employed in positions such as drivers or other low-level support staff. The catering was also brought in from South Africa.⁶⁸ In addition one of the Mozambican producers was offered an assistant director job on the set but was only offered R3,000 for the whole five-week shoot. He considered this far too low for a Hollywood production and turned the offer down.⁶⁹

Similarly in Zimbabwe, there have been some complaints directed towards South African commercial companies who allegedly expected cast and crew to work for 48 hours without a break. This is possible because of a lack of union strength.⁷⁰

Key issue: The location industry can be an important part of the southern African film and television industry if properly regulated and if the protection of the indigenous industry is ensured. It is important to ensure that countries within southern African do not undermine each other's working conditions and rates of pay.

4.3 Circulation

Circulation refers to the process by which the production is marketed and distributed. Production companies are involved in marketing their products directly to exhibitors and broadcasters. Broadcasters have a role in distributing television products. They may buy the universal rights to television productions and then sell them to other broadcasters nationally and internationally. They may also distribute videos of the television productions. Film markets and festivals (film festivals are also delivery mechanisms as indicated below) provide an important platform for the distribution of productions. Distributors and broadcasters frequent these events looking for good productions.

The distributors are the intermediaries between producers and exhibitors, responsible for the negotiation of licences with various outlets including theatres, home video manufacturers, and TV cable services and broadcast television stations. They are also responsible for the collection of film revenues and royalty payment to the owner of the work. The promotion and marketing of the film is usually the responsibility of the distributor. Theatrical distributors (i.e. distributors that distribute full-length feature films to cinemas or exhibitors) generally have two types of distribution agreements, those with independent producers and those with major or international producers. Agreements with majors tend to be renewed annually and all productions from the production company would be automatically distributed. This is called a "globalized distribution agreement". At the end of the financial year, the distributor will calculate the cumulative profits and losses of all productions from the major production company. If there is a profit it will be split between the distributor and producers and if there is a loss it will fall to the producer. These agreements are therefore low-risk deals for the distributor.

However, when buying films from independent producers, distributors pay an upfront minimum guarantee that is non-refundable and are also liable for printing and advertising costs. If they are unable to distribute this production, they are stuck with the losses. This is, therefore, a higher risk investment for distributors, which explains the lack of enthusiasm of many distributors to take a risk on locally-produced productions. However, if the production makes a profit, distributors do well as they structure contracts with producers in such a way as to ensure a higher percentage of the profits. They also buy the rights to home video, retail, pay television and free television which can give the product a long and profitable afterlife.

Whoever has a good command over the mechanisms of distribution controls the film and television value chain. While development and production are the most glamorous aspects of the business, money is really made on distribution for cinema, television, video and DVD. The distribution part of the film and television value chain is the most

⁶⁸ Interview with Ebano multimedia.

⁶⁹ Interview with Joao Ribeiro and Sol Covalho.

⁷⁰ Interviews, Mighty Movies in Harare.

important and problematic issue in the southern African region. Many films are produced in the southern African region, which never reach any level of substantial audience. In addition, due to the problems of broadcasting and theatrical distribution in the region, many films and television programmes may be seen by a small audience in Europe and never seen by Africans. Increasingly, production companies such as the Media for Development Trust know that “only effective distribution justifies production”.⁷¹ Distribution of television and film productions into all SADC countries is also very difficult. As a result many distributors focus only on South Africa and ignore other SADC countries. “The priorities given to South Africa by most major distributors have been understandably based on financial considerations, when in fact, the administration cost of sales and distribution to the rest of Africa have always been, with limited exceptions, not financially feasible.”⁷² For most African broadcasters, lack of advertising revenues translates into reduced licence fees and smaller acquisition budgets. Few African broadcasters have commissioning budgets and piracy is rife. This makes the market outside of South Africa extremely unprofitable for any distributor. “Africa’s broadcast development is beginning to mirror that of the Middle East and South America, where a host of satellite DTH providers with pass-through services and studio output deals define the industry’s topography.”⁷³

Key issue: The problems of distribution of audio-visual products in the southern ADC countries are arguably the primary blockage in the Film and Television value chain in the region.

In Zimbabwe, the Media for Development Trust Production Company is of some significance as they have produced and distributed some of the most popular films in the country. Their most successful to date is *Yellow Card* (see Box 4.4). In all their productions, they have attempted to provide young emerging film-makers with hands-on training and all their films were directed by first time directors. They are heavily involved in the distribution of their own, as well as other, African film products.

Box 4.4. Case study: *Yellow Card*, produced by Media for Development Trust

Funding

The film *Yellow Card* was produced during 2000. Media for Development Trust received the seed capital for script development of the movies from Pathfinder International. DFID provided the resources for production.

Distribution and marketing

The film was launched in five countries during 2000: Zambia, Zimbabwe, Kenya, Tanzania and Uganda. It has just started to be flighted as part of the Kenya airlines in-flight entertainment programme. John Riber attributes his success to a good-quality product, which “looks slick”. They had a Hollywood director of photography and also did a lot of merchandising of the film. Videos and soundtracks were released into the market as the film was launched. There was also a major launching ceremony in each of the five countries. These launches included big events and the producers and cast would arrive in limousines and heads of state were invited to the first screenings. They also included television appearances and promotions. MDT is also involved in the grassroots distribution of their products. Corporations and NGOs can use the *Yellow Card* video to run 2-day workshops on the subject of teenage pregnancy and MDT has developed support material in the form of videos and facilitator guidebooks.

⁷¹ MDT Annual report, 1997/1998.

⁷² Clifford T. Tendler. “The practicalities of TV programme distribution in Africa”, *Africa Film and TV magazine*, Feb.–Apr. 2001.

⁷³ *ibid.*

Follow-up activities

MDT are also currently looking into the production of a television series based on the movie with funding from the Ford Foundation. The plan is to produce seven one-hour episodes to be broadcast in 20 countries. They are also currently negotiating with broadcasters to get the film screened first as a way of ensuring interest in the series. MDT is currently negotiating with Primedia for the launch of the film with Ster Kinekor, a major distribution agency. MDT are likely to achieve a R300,000 release in South Africa with a four print run over 36 weeks. The theatre release of the film in South Africa through Ster-Kinekor was in 2002. The plan is for *Yellow Card* to go on a four print release throughout the country with a minimum of two weeks in each complex.⁷⁴

A success story

Yellow Card was more popular in Zimbabwe than the newly released Mission Impossible 2 during 2000. Over a 14 week period, 44 167 people watched the film in cinemas in the Zimbabwean urban areas. The cinema grossed Zim\$2,044,015 of which the Media for Development Trust received Zim\$661,096.69. In Zambia, 10,263 people attended the theatre release of the film. In Uganda, 1,079 people attended, while in Kenya 2,705 people saw the film. The Media for Development Trust received a total of US\$21,908.10 for theatrical releases across southern Africa.

MDT seems to have perfected a model for producing and distributing films for African markets and acquiring funding from donor agencies. It could be argued that the advantage of this approach is that they are afforded the luxury of producing specifically for African audiences where they are not likely to retrieve the cost of production and are, therefore, focused only on ensuring that African audiences have access to their product. Thus, unlike some other producers, they can afford to get their product screened on African broadcasters for US\$400-600 per hour, which does not allow for money to be made in the case of other producers who may be attempting to recoup at least their costs.

Key issue: Donor funding for a project does not preclude producers being entrepreneurial in accessing the funding and in marketing and distributing these films.

Players in this part of the value chain are mainly distributors, who ensure that product either gets to the exhibitors, broadcasters or retailers.

The key agents in the region, which distribute African films⁷⁵ are the Film Resource Unit, the Media for Development Trust in Zimbabwe and also smaller distribution agencies such as Videovision Productions owned by Anant Singh and ICE media. SACOD is also involved in the distribution of African product by focusing on distributing development oriented audio-visual works to relevant populations.

4.3.1 Film markets

Two film markets of relevance to the southern African region are the Sithengi market, the southern African International Film & TV Market, held in southern Africa and the FESPACO market held in Burkina Faso (which also distributes southern African product). There are also a number of markets held internationally which may distribute and exhibit southern African productions. Sithengi, held in Cape Town, is profiled in section 6 as a key body working within the region. Industry players believe Sithengi needs to pay more attention to being an African market for African product.

⁷⁴ Interview with John Riber, MDT, Zimbabwe; "SA Theatrical release for Yellow Card", *Sithengi Daily News*, 15 Nov. 2001.

⁷⁵ FRU and MDT will be profiled in more detail in section 6.2 (Agencies which work across the region).

Key issue: Film markets provide important opportunities for deal-making, networking and showcasing southern African film and television productions –if properly managed with clear objectives for growing the indigenous industry.

4.4 Delivery

Film and television productions reach their audiences through television, cinema and video and generally through all three of these mechanisms. Players in this part of the value chain include exhibitors (i.e. cinema owners), broadcasters, video retail outlets, video stores, film festivals and other more informal players who ensure audiences see productions. More informal players would include people who have public screenings of videos for communities or school, for example mobile video units, as discussed in more detail below.

Exhibitors are the owners or operators of a cinema to whom the distributor grants/ cedes the right to exhibit the film in return for an agreed share (usually 30–50 per cent) of the box office receipts.

Regarding cinematic exhibition, the number of prints released by an exhibitor determines how big the audience for the production is likely to be. Many local productions are released with only one print, which means they can only be shown on one screen at a time.

There are a number of delivery mechanisms for film:

A. Cinemas/exhibition

The whole concept of multiplexing of cinemas originated in the United States as a means of helping to boost admissions to cinemas by offering more selections and starting times than single-screen cinemas. However, the global market is now seeing saturation in cinema complexes and a resulting decline in profits for exhibitors. In South Africa, theatre attendance has declined at about 2 per cent per annum over the past few years while the number of screens has been growing by 2 per cent over the same period. In addition, since 1995, average cinema ticket prices have increased by 0.53 per cent. The expansion plans of both Ster Kinekor and Nu Metro have resulted in over-capacity and the increase in the number of screens has had a compounding effect on the decrease in audience attendance. Cinema attendance in South Africa provides a complex picture of cinemas closing down and new cinema complexes being built. Currently only 10 per cent of South Africans attend movie theatres at all.

The biggest challenge for cinemas is to build the black market in the country. Cinemas have been closed down in townships and CBD areas due to lack of attendance.⁷⁶ Understanding the lack of attendance at South African cinemas by the majority of the population is a broader research question but critical to understanding the market for local product.

In Mozambique, there are currently two cinemas in Maputo, which are managed by the Portuguese Lusomundo Group. Promarte has recently bought up 11 unused cinemas in Mozambique (which used to be nationalized and have recently been privatized) with the aim of converting them into video screening venues. They are currently screening Indian movies.

In Zimbabwe, Ster Kinekor has withdrawn due to the economic situation in the country, which has resulted in a huge loss of income. There are therefore currently only

⁷⁶ “Silver screen battles to regain sparkle”, *Sunday Times Business Times*, 20 May 2001.

about 10 screens in the whole country, which are probably also struggling financially and may close down if the economic situation does not improve.

Key issue: Cinemas in southern Africa do not currently attract big audiences due to a range of factors including the location of cinemas, lack of management skills, low levels of income of potential audiences, lack of marketing and a lack of audience development. Cinema attendance is an under researched area.

B. Film festivals

Festivals are very important for showcasing African productions. Film festivals of relevance include:

International festivals

- Africa in the Picture 2001 held in August–September in Amsterdam, the Hague, Rotterdam and Eindhoven, the Netherlands. Africa in the Picture is the platform for film-makers to present their work on the past and present of the African continent, and on the dispersal of Africans throughout the Atlantic triangle, the Diaspora.⁷⁷
- Through an African Lens is (February–March 2002) a major film festival focused exclusively on the cinema of Africa. Rakumi Arts is a non-profit organization which seeks to bring African art and music to and from the region and works in conjunction with the University of Washington Program on Africa and The Seattle Art Museum.⁷⁸
- The Pan African Film Festival held its 10th Anniversary Festival in February 2002. PAFF is America's largest film festival showcasing over 75 black films from the United States, Africa, the Caribbean, South America, the South Pacific, Europe and Canada.⁷⁹
- The International Documentary Filmfestival Amsterdam (IDFA) is the world's leading documentary film festival, featuring more than 200 documentaries and attracting an audience of over 65,000.⁸⁰

Regional festivals

- The FESPACO festival, while not held in the SADC region, is a significant festival for Africa, held every two years in Ouagadougou, Burkina Faso. One of the challenges is for southern Africa to increase its representation at the festival. In 2001 only John Riber's *Yellow Card* was entered from southern Africa into the feature film competition although *Bintou* (produced by a Zimbabwean company) won the prize for the best short film and also won four special awards.
- SAFF (Southern Africa Film Festival), now disbanded, was held in Zimbabwe every two years as the official festival of FESPACO. The 2000 festival ran for two weeks, one in Harare and one in Bulawayo. The 2000 festival was attended by film-makers from Ethiopia (Solomon Bekele), Zimbabwe (John Riber), Tanzania (Martin Mhando) and South Africa (Zola Maseko).

⁷⁷ "Africa in the Picture", *Africa Film & TV*, Edition 31, Nov.– Jan. 2002.

⁷⁸ www.rakumi.org; quoted in *Africa Film & TV*, *ibid.*

⁷⁹ www.PAFF.org; quoted in *Africa Film & TV*, *ibid.*

⁸⁰ www.idfa.nl; quoted in *Africa Film & TV*, *ibid.*

- The Zimbabwean International Film Festival is held every year in September, screening foreign films not screened on the main circuit. With the demise of the SAFF they are trying to show more southern African films as well. The 2001 festival (held in September) screened 27 films from around the world to 8,000 people. The Mbira Centre gave a surprise award for Best Film in an Indigenous Local Language which they plan to repeat each year. The prize went to Short Film Project participant Tawanda Gunda for *Special Delivery*. ZIFF 2001 also featured the premiere of a number of new projects aimed at developing Zimbabwe's young film-makers. The short film project is an initiative of ZIFF with Ice Films, African Script Development Fund and the UNESCO Film and Video Training Project. The project aims to create more opportunities for aspiring film-makers to gain practical experience in writing, directing and exhibiting their own films.⁸¹
- Namibia Film Festival, only two years old, has now become an annual event. It showcases Namibian product only (see section on Namibia).
- Lesotho has a film festival in Maseru.
- FRU is involved in a Festival in Maputo run on a biennial basis.
- Ziff Festival of the Dhow Countries in Zanzibar has a very well-run festival, which takes place in July and has been established for over 4 years. It offers 100 films, 50 music and performing arts groups, exhibitions, seminars, workshops, and social programmes for women and young people at many of the 40 villages around the islands.
- Johannesburg, South Africa has a number of film festivals including the Soweto Film Festival, held annually in Soweto, which showcases local films to local audiences. The theme in 2000 was "Soweto to Soweto"; in 2001 it was "Township, AIDS, and Xenophobia".
- Cape Town, South Africa, the Apollo Independent Film Festival runs at the Apollo Theatre in Victoria West at the end of September. It showcases African and local films. In 2001 it concluded with a gala award evening presented by West African film producer Gaston Kabore.⁸²
- Durban, South Africa has a film festival and hosted a successful week-long Film Festival Against Racism in late August 2001 as part of the cultural programme of the Department of Arts, Culture, Science and Technology for the World Conference Against Racism. A total of 56 feature films and documentaries were screened for free to the public, including conference delegates. Over 11,000 people attended the film screenings and many took part in issues and themes, ranging from threats of globalization, racial representation and misrepresentation in the international film and television industry, poverty, landlessness, and reparations.⁸³
- Encounters is a festival in South Africa focusing on documentaries which travels around the country.

⁸¹ "Zimbabwe Film Festival 2001", *Africa Film & TV*, *ibid*.

⁸² See www.heritage.org.za/apollo and www.businessday.co.za/bday/content/direct/1,3523,912650-6078-0.00.html

⁸³ "Film festival against racism took Durban by storm", *Africa Film & TV*, *ibid*.

- SACOD hosts a film forum every year (held in Windhoek, Namibia in 2000 and in Maseru, Lesotho in 2001). This event brings together film and video directors and distributors from the southern African region in order to screen and debate film and video productions on social, political and developmental issues from the region.

Key issue: Film festivals provide an important opportunity for showcasing Southern African film and television production and should be more frequent, more widely distributed and better marketed

C. Mobile video units/rural video shows

Some southern African countries are using mobile video units as a means of exhibiting African productions to African audiences.

In Mozambique, there are approximately 2000 “canteens” in operation – informal businesses where individuals have set up video screening sessions in their shops, garages or the gardens of their homes. Members of the community watch films here for less than 50 cents. The production company Iris Imaginações is currently working on a project entitled Film Afrik where they intend to distribute African films to these canteens to ensure greater access to Mozambican films by their own audiences.⁸⁴

In Namibia, Carla Hoffman from the production company Mubasen was keen to establish a regular screening of films in Kalutana as part of an audience development initiative.⁸⁵ They used the youth centres. Although there is a disused cinema in Kalutana, the municipality was not keen on partnering with Mubasen and wanted them to buy the cinema. This was a disappointment as they were keen to set up a video resource unit and work with FRU (South Africa). While there are mobile video units, these are owned by the government. Local film-makers either do not know about these units, believe they have no access to them or consider the conditions attached to using them are too onerous (such as paying the drivers and following a prescribed route). Vincent Xoagub, Ministry of Broadcasting and Information official, insisted that their 11 mobile video units were available free of charge for non-commercial use and for a small fee for commercial use.

In South Africa, Ster Kinekor launched their Ster Mobile units in February 2000. These mobile units serve urban and peri-urban areas in the country. They have 10 mobile units in eight provinces, have a regular monthly route and are currently reaching 2 million people a year.⁸⁶

Key issue: Mobile video units can provide rural and out-of-reach areas with access to film screenings. Funding for screenings in mobile video units is a necessary component of funding the production of a film.

D. Television/broadcasting

Broadcasters are a key delivery agent. In most African countries the broadcast environment is still very much dominated by the public broadcaster. Broadcast systems are still evolving in southern Africa. Many remain voices of the State; others are making the transition to being a public service broadcaster rather than a national broadcaster. With television mostly servicing an urban population, many SADC broadcasters are struggling to roll out transmission infrastructure that will be affordable and accessible to

⁸⁴ Interview with Francisca Serrao, Iris Imaginações, Mozambique.

⁸⁵ Interview with Carla Hoffman, Mubasen, Namibia.

⁸⁶ “Developing a cinema audience”, question time with Sean Reed, *Sithengi Daily News*, 13 Nov. 2001.

people living in remote and undeveloped areas. As Mandla Langa, Chair of the Independent Communications Authority of South Africa said:

The overriding challenge facing all of us here is to ensure the closure of the information gap – between nations and within our countries. While we talk of the information highway we must not forget that in the countries of southern Africa there are many pedestrians and donkey carts. Let’s make sure there is an open lane for them as well.⁸⁷

4.4.1 **Broadcasting and local content**

The legislative and policy framework in southern Africa is supportive of local content. In addition, producers and broadcasters in most countries acknowledge a link between broadcasting and development and expect public service broadcasting to perform this role. A critical problem in realizing this objective is censorship, or to put it more mildly, fear of criticism of the government. This constrains broadcasters in that information that can facilitate development or programming is at times construed by the government as criticism.

The role of local content quotas in supporting the development of indigenous film and television industries in southern Africa is not uncontroversial. Lara Kantor, executive director of the National Association of Broadcasters argues that “quotas alone will not grow the cultural industries and broadcasters alone cannot be expected to carry the burden of growing these industries”.⁸⁸ It would certainly appear that local content quotas can only support the growth of a world-class indigenous industry when implemented along with other comprehensive policies to grow the industry. This strategy should include training and funding policies and incentives. In the case of Zimbabwe, for example, the imposition of a 75 per cent local content quota in the absence of any clear strategy for building the local industry seems destined to fail.

Key issue: Local content quotas can assist with the development of the indigenous industry as part of a package of government measures to promote growth

4.4.2 **Television penetration**

Broadcasting is also a relatively new industry in many African countries. While the world boasts a television penetration of seven out of ten households, Africa can only claim one in five households. Table 4.1 compares GNP per capita with televisions per 1,000 people.

Table 4.1. Comparison of GNP per capita with televisions per 1,000 people, SADC region, 1997

Country	GNP per capita	Televisions per 1000 people
Seychelles	10 530	191
Mauritius	9 400	228
Botswana	8310	27

⁸⁷ Mandla Langa. “Let a new earth rise”, speech delivered to the Commonwealth Broadcasting Association Conference, Cape Town, Oct. 2000.

⁸⁸ Lara Kantor. “Local content quotas – the great debate”, *ScreenAfrica*, May 2001.

Country	GNP per capita	Televisions per 1000 people
South Africa	6990	125
Namibia	4950	32
Swaziland	3580	107
Lesotho	2320	24
Zimbabwe	2150	29
Zambia	860	80
Mozambique	850	4
Angola	840	91
DRC	750	43
Malawi	730	2
Tanzania	490	21

Source: J Du Toit, (2000) South African Development Community: An economic profile. Absa Bank publication

Key issue: Television penetration in Southern Africa, although growing, is still very low in many areas.

4.4.3 *Broadcasting as a cultural industry*

There is a difference between entertainment and culture. Not all TV is culture, not all cultural film product is entertaining: however, broadcasting is regarded as a cultural industry. Far too little attention is being paid to content and the content providers and too much attention is paid to rolling out the information infrastructure that achieves universal access. What makes broadcasting a cultural industry is that it is a content provider – and it is here that attention should focus. The South African Minister for Communication, Dr. Ivy Matsepe-Caseburri concurs:

The tendency has been to focus on technologies, infrastructure and facilities, yet we must be aware that in bringing about a meaningful 21st century and the African Renaissance, we must pay attention to the cultural and historical context and therefore focus also on content and services to be delivered via these technologies. Broadcasting is regarded as a cultural industry. The content issues remain the most important for it, and if Africans are to be shapers of their destiny, and define for themselves their identity – broadcasting has an important role to play. We must promote cultural excellence, intellectual vibrancy, showcase the tremendous promise, exceptional talent and resourceful people and bring together the communities yearning for and primed for positive transformation of our societies, countries and our continent.⁸⁹

Table 4.2 outlines the local content and budgets in the SADC region. The quality of broadcasting in the region is considered to be poor both in terms of the programme material as well as the broadcast technology, which is often old and out of date. Many

⁸⁹ Dr. Ivy Matsepe-Casaburri, Communications Minister, South Africa. Opening speech to the Southern African Broadcasting Association Conference, Cape Town, Oct. 2000.

broadcasters lack skilled people to manage their operations. Indications of the state of broadcasting in the region are as follows:

- In Zimbabwe, they are in the process of re-launching the Zimbabwe Broadcasting Authority (ZBC) in order to find new people with the required skills.
- Tanzania's state-owned broadcaster has very outdated technology and a lack of skills and money.
- Zambia's broadcaster also has very poor technology.
- The Mauritius broadcaster has three channels and is quite sophisticated. However, they are a small country and have a very small market.
- The Namibian broadcaster has fair quality of technology at its disposal.⁹⁰
- South Africa has the most sophisticated broadcasting environment, with three television broadcasters and over 40 channels.
- In Botswana, the independent broadcaster ITV only started broadcasting very recently.

Table 4.2. Local content and budgets in the SADC region, 2002

Country	National policy on local content station policy local content	Percent- andage of local content	Hours of broadcast	Percentage of national budget for information	Percentage of national budget for PBS broadcaster	Percentage of programme budget spent on local content	Budget for programme acquisition
Angola	New Press law has national culture framework.	62.9%	17.5 hours				No info
Botswana	Vision 2016 Policy very strong on national identity.	60% planned	3 hours week days 7 hours weekends	1.1%			Not known
Lesotho	Media Policy strong on local content related to national development.	No policy. Actual 1 hour per day	Currently 1 hour per day Planned 22 hours with TV Africa feed	1.1%			M1, 100, 000 (US\$176,000)
Malawi	Draft Media Policy – not approved by government: links media and development.	2-6 hours of 24	24 hours				Not made available

⁹⁰ Interview with Jurie van der Walt, African Broadcast Network, 1 June 2001.

Country	National policy on local content and station policy local content	Percentage of local content	Hours of broadcast	Percentage of national budget for information	Percentage of national budget for PBS broadcaster	Percentage of programme budget spent on local content	Budget for programme acquisition
Mozambique	Info and policy strategy supports media link to development.	56%. Aim 60%.					Yes, but details not provided
Namibia	Information policy names media as catalyst for development. NBC has no written policy, strong commitment from current board.	Less than 30%. Aim 70%.	24 hours		0.73%		Yes, details not available
South Africa	Policy and legislation. Regulation in place. SABC regulated at 25%.	SABC 1 40%. SABC 2 55%. SABC 3 35%.	24 hours	0.2%	0.05%		Yes, R250 million
Swaziland	No media policy/ local process begun by independent media sector. STV has commitment to portrayal of Swazi culture but no policy.	Not known	24 hours	0.59%	0.19%		E1, 613,971 (US\$225,793) Under-spent by 45%
Tanzania	Broadcasting Service Act links licensing to development content 40% local content encouraged, not regulated. TVT has no policy but strong commitment. Director sees link of media to development.	75-90% being achieved.		0.47%			Station too new, no budget yet
Zanzibar	As Tanzania. ZTV has no policy but commitment exists.	70%	7 hour week 14 hours weekends				Yes, TSH 12 million (US\$15,000)

Country	National policy on local content and station policy local content	Percentage of local content	Hours of broadcast	Percentage of national budget for information	Percentage of national budget for PBS broadcaster	Percentage of programme budget spent on local content	Budget for programme acquisition
Zambia	None found. ZNBC has "a desire" more than an entrenched policy'.	Not stated	7 hours per day	0.15%	0.3 %	1.6%	Yes, K125,000,000 (US\$44,964) breakdown: K75 million foreign and K39,000,000 for BBC Tx.
Zimbabwe	Ministry of information document. Links media to development. ZIMPREST national plan calls for indigenization. ZBC has no policy.	50%	18 hours per day	0.1%	None	Not specified	Est. US\$10-15,000

Source: SACOD Advocacy Research Project.

Box 4.5. The case of Multichoice

MutiChoice is a satellite platform which delivers 45 TV channels throughout Africa including niche channels for German, Italian, Arabic, Portuguese and Indian viewers. South African based TV channels make-up a substantial part of the TV services carried by MutiChoice, including M-Net and SuperSport, Kyknet (an Afrikaans-language channel) and SABC Africa and A2A (24 news service and African culture respectively). MutiChoice Africa was formed in 1993 and became the first African company to manage and sell subscriptions to satellite television. In June 1996 MutiChoice launched one of the world's first digital multichannel TV services, DStv. By June 2000, MutiChoice Africa had 1,385 subscribers in Africa and the Middle East. DStv channels now include General Entertainment (M-Net Channel, The Series Channel, Sci0Fi, Africa2Africa, BBC Prime, Kyknet), Movies, Sport, News (including BBC World, CNN, Sky News), Infotainment (Including Discovery Channel, National Geographic Channel), Kids, Music, Radio and Free Channels.⁹¹

4.5 Audience reception and feedback

This stage of the value chain refers to how all players in the chain receive feedback on their production – from critical reviews published in magazines, television ratings, cinema attendance figures and word of mouth. This feedback in turn influences the context or cultural milieu in which new productions are conceived and the level of investment the next production is likely to attract.

As noted above, there is little understood about the audience for local content and little support for the production of local content. Film criticism is weak in the region. Some producers have recognized this and developed strategies to receive feedback on their productions. John Riber, for example, invited the media to all the premiers of his film *Yellow Card* and has included the reviews of the film on the MDT website. Film

⁹¹ "Anglophone pay TV", *Africa Film and TV*, 2001.

critics in South Africa concentrate on Hollywood productions or foreign movies. Local movies get a difficult hearing in the South African press. The NFVF task team dealing with distribution and marketing has appealed to local critics to be more positive about South African movies.

While mobile video units play a role in fostering particularly rural audiences, some commentators argue that little is known about this media's efficacy and impact.⁹²

It can be safely stated that the market for African film and television production internationally and on the continent is too small and needs to be nurtured in order to sustain a flourishing industry.

4.6 Institutional and cross-cutting issues in the SADC region

4.6.1 Employment, wages and working conditions

Full-time workers in the cultural sector in the SADC region are few in number. The formal jobs created are skilled and attract people with tertiary qualifications. Most cultural workers in this sector are hired on a contractual basis. Camera-people, directors, editors, make-up artists, lighting or rig experts move between the film and television industry and the commercial sector. This has created particular problems in South Africa, for example, where most of the cultural workers are not regarded as employees and therefore are not covered by the Basic Conditions of Employment Act and have no access to benefits or training through the skill levies paid in by employers. The South African Department of Labour is attempting to address this situation.

One such attempt to bring cultural workers in line with other regulations and legislation is the promulgation of a 45-hour week and its extension to workers in this sector. The film and television industry in South Africa has found it hard to adjust to this and is now faced with a further reduction to 40 hours per week. Currently 10 hours overtime is allowed in a 45-hour working week. This can be compared to the international norm of a 72-hour week on films, TV drama and documentaries.

Key issue: Workers in the film and television industry are often contractual workers and are therefore not protected by the same legislation as workers in other industries.

IPO research indicates that costs would rise 40 per cent if a longer working week were implemented, while costs could rise 70 per cent if more time was allocated to production. Rod Stewart, ex-chair of the Consultative Committee argues for a 60-hour working week as the norm to keep costs stable and maintain competitiveness. Government and industry organizations are currently in consultation over these issues.⁹³

⁹² SACOD's Chris Kabwato argued for a dedicated research project investigating this issue.

⁹³ "Call for regulation", *ScreenAfrica*, Nov. 1999.

Table 4.3. Comparison of rates of pay for crew, selected SADC countries, 2002

Position	Rate in South Africa in rands	Rate in South Africa in dollars*	Rate in Mozambique in US dollars	Rate in Zimbabwe in Zim\$**	Rate in US\$	Rate in Namibia dollars	Rate in Namibia dollars	In rands at parallel market rate**
Camera man lighting	4000	500	150	17000.00	68.97			680.00
Camera man operator	3000	375	100-120	11900.00	51.72	1500.00	187.50	476.00
Camera man assistant	1200	150	50	5100.00	20.69			204.00
Sound man	1200	150	80-100	8500.00	20.69	900.00	112.50	340.00
Grip	1200	150	80	5950.00	20.69	700.00	87.50	238.00
Crew assistants	650	81.25		4250.00	11.21			170.00
Make-up artists	1250	156.25		5950.00	21.55	600.00	75.00	238.00
Director	10000	1250		20000.00	172.41			800.00
Production manager	900	112.5	100	6000.00	15.52	900.00	112.50	240.00

* Conversion rate used R1 = US\$7.9
** Conversion rate used Zim\$1 = US58

Table 4.3 provides a comparison of rates of pay between Zimbabwe, Mozambique, Namibia and South Africa. The conversions have been calculated using the prevailing official exchange rate at the time of writing this report. However, this is probably inaccurate as the black market rate is frequently used for transactions, especially in Zimbabwe. It is clear that costs in South Africa are considerably higher than in other countries in the region.

While the number of full-time employees is very small, it is important for the cultural sector as a whole to be aware of the multiplier effect of the production of a film for related and supporting industries such as catering, car-hire, hospitality etc. Within the industry, the number of freelancers involved in a particular production is high. In Australia, for example, *Moulin Rouge* was shot entirely at Fox Studios in Sydney. The wardrobe department alone for this film employed 100 people and there were 500 performers on-camera at any one time, despite a relatively limited budget.⁹⁴

In South Africa, new forms of employment are being found in the much discussed genre of “reality television”. South Africa-based Videovision Entertainment won the rights to produce a local version of the *Survivor* show from its creators, Castaway Television Productions in the United Kingdom. CEO Anant Singh said that the hit reality

⁹⁴ *ScreenAfrica*, Aug. 2001.

series will give employment to between 100 and 120 people and speculated that it would have a bigger budget than a drama production.⁹⁵

4.6.2 Race and gender in the film and television industry

White men, particularly in positions of producers, dominate the southern African film and television industry. The Cultural Industries Growth Strategy Report of 1998, indicated that, in 1995, only about 34 per cent of the people working in the South African industry were women and a very low 10 per cent were black. However, it is likely that more black people are active in the industry currently. However, accusations of contracts being awarded to a handful of mostly white producers by the broadcasters persist. Approximately 90 per cent of all local programming produced for television in South Africa, for example, is produced by only 15 production companies.⁹⁶ This is understandable from the broadcasters' perspective, as they need to commission products from producers they are certain can deliver good-quality television programming. However, this practice does not assist with making the industry more racially representative as the tried and tested producers are often white males.

In Mozambique, there are two women active in the industry – a producer and a sound technician. All five production companies are headed by white men with the exception of one white woman. The industry is more representative when it comes to other casting positions (some black sound people and assistant camera people). However, given the limited training available, few career development opportunities exist. Producers in Mozambique complain that the film and television industry is not seen as an attractive career prospect for up and coming talented black people because government does not support the industry.

The Zimbabwean industry is a little more representative, in that there are some emerging black male and female producers and directors. The two co-productions which the Zimbabwean Broadcasting Corporation is involved in have been awarded to black producers. As in most southern African countries, the majority of actors are black. However, key players in the industry are white men (and some white women).

In Namibia, by contrast, while the number of women producers and directors is still small, a few dynamic women have succeeded in producing and directing exceptional films. Bridget Pickering, for example, is a single mother in the African film industry. After an intense period of writing, directing and producing her movie, *Uno's World*, she has opted to spend some time in Johannesburg with Ice Media “to keep the creative momentum and spirit high ... and be among some of the most inspiring people in the southern African film industry”. She believes that “women can stand on their own in the industry, if given the opportunity. And bringing up a child alone can be a burden but a challenge as well. Like many other Namibian single mothers, I have managed to combine parenthood with my film-making career. In this regard, one should never underestimate oneself in what one wants to achieve.”⁹⁷ Carla Hoffman, another Namibian producer and also a mother, has not only produced a number of excellent films (see profile of the Mubasen production company under Namibia), but is also the SACOD Namibian

⁹⁵ *ScreenAfrica*, *ibid.*

⁹⁶ *ScreenAfrica* editorial, Mar. 2001.

⁹⁷ Interview with Bridget Pickering, “Face to Face with Bridget”, *The Namibian Weekender*, 20 Apr. 2001.

representative and is improving her skills base by doing the AVEA producer course. A third young black woman, Jennifer Bassingthwaite is a “producer-in-training” with NIFA and is also playing a role in building organization in the film industry.

There is some tension between black and white film-makers in Namibia with an underlying assumption that white film-makers receive a greater proportion of available donor funds and receive more than their fair share of contracts. The reality, as always, is a little more complex – with factors such as networking and certain business skills (in particular proposal writing, niche marketing and deal-making) being critical in determining the success of players in the industry. Nevertheless, it cannot be said that whites dominate the industry in Namibia. Film-makers such as Vickson Hangula (*Kauna’s Way*) and Abius Akwake are role models for up and coming black film-makers through their success and international acclaim.

A recurring issue in the Sithengi market is that of African representation (from the rest of Africa) and racial representation in decision-making, in exhibitors at the market and in panels and choice of themes. A significant development at Sithengi 2001 was a discussion forum between the organizers of Sithengi and a representation of black film-makers. The meeting concluded with key action points agreed on and a general sense of progress.⁹⁸

Key issue: Throughout the region, white people and men play a dominant role in the film and television industry, resulting in some racial tension between film-makers in each SADC country.

4.6.3 *Financing projects*

Finance is the critical element of a vibrant film and TV industry. However, this is a high-risk industry with limited private sector investment. In addition, many players consider that they should be able to receive full funding for a project, from script through to final distribution and exhibition. Many argue against the broadcasters, such as SABC, holding copyright on the product; the broadcasters argue that they commission the work, they pay for it and all other expenses and that is why the broadcasters – and not the film-maker – retain copyright. There is a perceived lack of commercial and business sense among many film-makers, including their inability, collectively, to regard themselves as an industry. A few government incentives and supply-side programme measures in South Africa, for example, could be adapted for the film and TV industry but most producers do not know about them or how to access them. As local producer David Wicht said at the UK/SA Co-production Workshop at Sithengi 2001, “Although there [was] lots of money available in South Africa, the independent production sector didn’t yet know how to access it.”⁹⁹ This requires some organized interactions with the Department of Trade and Industry in order to ensure that such incentives are adapted for the industry. A huge training and development opportunity for the SADC region is to assist film-makers, producers and scriptwriters to understand business and commerce, and to develop expertise in accessing financing.

The South African Film Finance Corporation (SAFFCO) is another player in this market. This film finance organization was launched in 1997 and has now diversified into the service industry for long-term projects only. Chris Roland, executive producer at SAFFCO is loaned out to both local and international production companies in his professional capacity. In this way, he has produced 16 commercials in the past 12

⁹⁸ Discussion with key players at Sithengi 2001 in Nov.

⁹⁹ “Forging UK/SA co-production”, *Sithengi Daily News*, 14 Nov. 2001.

months. SAFFCO is also involved in three co-production agreements with Canada and Europe. The Canadian co-production agreement includes four films, which are supported by South Africa's Department of Arts, Culture, Science and Technology (DACST) and TeleFilm Canada. *Partition*, for example, is a US\$19 million project set during the breakaway of Pakistan from India and will be shot in the Cape. It stars Johnny Depp and Helena Bonham-Carter. Another film, *I am a Walrus* is written and directed by Roland with shooting and post-production in Cape Town and Johannesburg.¹⁰⁰

A key impediment to the growth of this industry is the lack of understanding of the investor market in the business aspects involved in making film and television products. These products are seen as undifferentiated and "institutional investors do not appreciate the distinction between high-risk feature films and television productions and lower-risk productions".¹⁰¹

There are other film financing models in the South African market such as Entertainment Guarantors (EG), which provides a shortfall guarantee. This gives a "top-up" to the elements of a deal's finance of up to 50 per cent of the budget. This can be guaranteed to local and foreign investors. To access this shortfall guarantee, the producer has to complete a number of steps:

1. Distributor: The producer has to acquire the interest and services of a high-level distributor with a track record in the genre of the film or TV production being undertaken. This distributor has to provide country-by-country projection as to the estimated revenue.
2. Cash: The producer has to have tied up 50 per cent of the cash required. This could involve advances from the distributor, tax or subsidy deals and pre-sales conversions.
3. Completion bond: Before the bank will discount the pre-sales, the producer has to provide a Completion Bond guaranteeing the delivery of the material without further moneys being spent by the investors. All Completion Bonds require standard Film Producer's Indemnity (FPI) insurance.

Stan Roup from Entertainment Guarantors explains that in providing all three of these services to the producer they ensure that no one party can complain of a loss against any other.¹⁰² Examples of films that used this system is *A Reasonable Man*, *Inside Out*, *Boesman and Lena* and *High Explosive* (see Box 4.3). Figure 4.1 illustrates the total package and how it comes together.

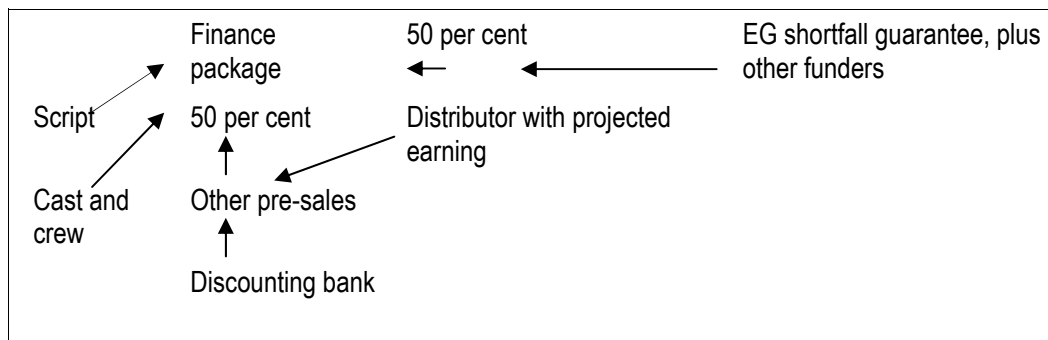
Many of these examples were joint ventures between the bigger production companies in South Africa such as AME, Primedia and Sasani.

¹⁰⁰ "Saffco signs up co-prods", *ScreenAfrica*, Nov. 1999.

¹⁰¹ Faried Manuel, special projects officer for Wesgro, a Western Cape provincial trade promotion and investment agency, reporting that "25 per cent of the R7.7bn entertainment industry comes from the Western Cape's share of activities within the film industry", *BusinessDay*, 20 Apr. 2001.

¹⁰² Stan Roup, of Entertainment Guarantors, speaking to Howard Thomas in *ScreenAfrica*.

Figure 4.1 Short-fall guarantees: A financing model used in South Africa



Key issue: It appears that the smaller independent production companies have not utilized shortfall guarantee financing models either because they cannot come up with their side of the deal or the deal is structured in a way that automatically excludes them. Further policy research would need to investigate mechanisms (such as government loans or guarantees) to ease the entry of smaller production companies into financing schemes such as the South African model.

In South Africa, investors are showing confidence in the industry. A surprising new development in the finance area is the investment by the Industrial Development Corporation of R 200million into film financing; the World Bank's decision (through its IFC arm) to invest in this sector in South Africa; and the decision by Rand Merchant Bank to invest in commercially viable film projects from US\$3 million upwards.¹⁰³ The RMB investment is similar to the IDC in that it requires other co-production investment. Requirements for film-makers are that the investment should not exceed 40 per cent of the budget, a minimum of 5-30 per cent of the budget must be spent locally although the film can be shot offshore, film-makers must submit a treatment, distribution agreements, pre-sales, a well structured budget and proposed funding sources and other equity.

South African film producer Anant Singh has developed a financing mechanism to avoid the huge losses of the past. His new structure leaves him ownership of the asset so that he can recoup costs and make money from distribution channels such as television and video (see Box 4.6).

In Zimbabwe, there is very little financial support from government for film and television production in spite of the 75 per cent local content quota in place. The broadcaster is currently prepared to spend about Zim\$40 000 for a 30 minute production. In 1999, there was some discussion of a film fund being established to which donor agencies and government would contribute. However, this does not seem to have materialized. The national film forum set up under the broadcast authority will apparently be receiving Zim\$7 million for the production of local content for the year 2001.¹⁰⁴

4.6.4 Stakeholders: Lobbying and organization

Outside of South Africa, film and television industries have fairly low levels of organization and ability to lobby government. In Zimbabwe, a union called ZIFFTAU was established to represent producers' interests but is no longer very active, nor is the Independent Producers Organisation.

¹⁰³ KPMG Media and Entertainment Division; *Sithengi Daily News*, 15 Nov. 2001.

¹⁰⁴ *Africa Film and TV Magazine*, Feb-Apr. 2001.

In Namibia, the Film-makers of Namibia (FAN) has recently been reactivated with the express purpose of interacting with the newly established Film Commission. A key problem facing small industries is that participating in organizations can detract from the day-to-day bread and butter issues of producing and creating new product. Nevertheless, the imperative to maintain FAN will ensure that people do come forward to play leadership and organizational roles.

Box 4.6. The business of movies

“Currently, if I produce a movie for Warner Brothers, the cinema keeps 50 per cent of what is taken in at the door, the distributors take 25 to 35 per cent of the balance, and Warner Brothers takes its marketing fees. I am left with zero. My new structure involves financing the films independently with lower distribution fees and leaving me the ownership of the negative, which is an asset in perpetuity because of television, pay television and video revenues. Our first experience of this set-up is *Black Mask*, which we co-produced in Hong Kong. We found a distributor, for which our co-producers put up no money, although they did pay US\$8 million to market it in the United States. The movie made about US\$13 million at the box office, from which the distributor received \$6.5 million, but the television, video, pay television and DVD revenues are worth about \$17 million. If we had struck a conventional deal, we might have got \$500,000 – or no money at all – but with this structure we’ll get about \$4 million. Such is the business of movies.”¹⁰⁵

Source: Anant Singh, South African film producer.

In Mozambique, producers are in the process of establishing an independent producers’ organization called Amocina that would seek to:

- present a united front for the purposes of lobbying government;
- deal specifically with the concerns of the industry regarding the impact of high taxes on the purchasing and hire of equipment from South Africa or elsewhere;
- find ways to deal with the issues of the pirate video market in the country;
- impose a levy on cinema tickets;
- develop a distribution and exhibition process;
- deal with the regulation of foreign crews;
- provide information on available donor funding for production; and
- provide opportunities for new-comers into the industry.

South Africa has comparatively strong representative organizations. These include:

- SASWA – The South African Scriptwriters Association which represents scriptwriters
- IPO – The Independent Producers Organisation
- PAWE – The Performing Arts Worker’s Equity which represents actors, directors, writers, singers, dancers, musicians, technicians, administrative staff and other people working in the arts field.

¹⁰⁵ Anant Singh . “The business of movies”, at a Gibs Forum. See www.gibs.co.za

- NTVA – The National Television and Video Association of South Africa, an umbrella association for the electronic media industry.
- The Cape Film and Video Foundation – This is a section 21 company which represents companies in the film industry in the Western Cape. Their main objective is to promote the Cape locally and internationally as a location for film shoots.
- WIFT – Women in Film and Television – This organization plays a role in educating and promoting the achievements of professional women, supporting equitable opportunities for women in the industry and enhancing communication within the industry.
- SASC – The South African Society of Cinematographers is a educational, cultural and professional organization. Membership is by invitation only and is extended to directors of photography with distinguished credits.
- SAGE – The South African Guild of Editors’ purpose is to promote editors in the industry, ensure high standards of editing, facilitate channels of communication with other stakeholders, provide education and training for members and lobby producers for better working conditions and contracts.¹⁰⁶
- The National Film and Video Foundation was set up by the South African government. It serves as a go-between between government and the film industry and is responsible for distributing the R12 million in government funding for the industry. The NFVF estimates that there are currently approximately 20,000 people employed in the South African film and television industry.

Key issue: the film and television industry in Southern Africa is generally weak organizationally. This undermines the ability of film-makers to lobby government, to access government support schemes and be represented at international fora, markets and festivals.

4.6.5 *Location*

In the five countries surveyed, much of the film and television industry is located in the capital cities or a key economic city, such as Johannesburg. This agglomeration of sectoral activity is typical of the industry internationally. However, internationally, cities and towns outside of the capital cities, are recognizing the importance of nurturing the industry and supporting companies and organizations in their areas.

In South Africa, for instance, while Johannesburg has the lion’s share of the cultural industries, the City of Cape Town has recognized the importance of marketing its industries whilst marketing its city and developing local incentives to build on its industry. For this reason, it has chosen to focus on the film industry and tourism as significant contributors to the economic and social development of the whole Western Cape region. The city has commissioned a study looking at investing in the film industry in partnership with the Cape Film Commission to investigate incentives, such as tax concessions for the industry. The city is also examining the feasibility of a new film studio.

The City Council believes that local production should be encouraged. As the councillor for Economic Development, Tourism and Property Management Portfolio said: “We are not only concerned with providing for tax incentives but would like to see

¹⁰⁶ Cultural Industries Growth Strategy, 1998.

more local films and content being produced... There are great stories to tell and we will encourage the development of the local film industry.” The council has recognized that as a preferred site for locations, the film industry markets the city internationally and creates jobs: “It is free marketing for Cape Town and brands the city.”¹⁰⁷

Such initiatives highlight the role local authorities can play in supporting and encouraging existing industries. Cape Town has already become a centre for the production of commercial and feature films with film crews often at work in the city’s streets. The estimated value of the industry in metropolitan Cape Town is R2bn annually.¹⁰⁸ In 2000, Cape Town city issued 1,750 permits for film and photo shoots, involving about 820 shooting days. Cape Town Film Office supervisor, Malcolm Calderwood says that this compares favourably with San Francisco’s 980 shooting days in the same year, Philadelphia’s 280 and Seattle’s 290. The rate of permits is still rising: in the first quarter of 2001, 710 permits were issued. Cape Town is also well endowed with production facilitation companies – there are 12 feature film companies and almost 60 that produce commercials. Private sector investment has taken off as local investors recognize the potential for growth. Sasani has built an 8,500m² studio complex at the V&A Waterfront, and The Refinery invested R20m to upgrade the LongKloof Studios and acquire new technology. This investment is not limited to local investors. One of Germany’s largest film and television equipment rental company, Cine Licht, invested R50m to establish a subsidiary in Cape Town.

A new initiative, to develop two new Hollywood-style film studios for Century City and the Good Hope Centre, are estimated to generate between R100 million and R500 million a year for Cape Town.¹⁰⁹ The Cape Film Commission has developed a programme to promote and train young film-makers from the disadvantaged communities in the Western Cape and also to develop a fund-raising strategy to promote job creation, market the province as a location and support training and development. As CEO Pinky Mseleku explains: “I have great hopes for this industry and believe that we can transform the economy of the Western Cape. Cape Town can be a gateway into Africa for filming”.¹¹⁰

Key issue: The film and television industry in the SADC region is located in urban areas, generally concentrated in the capital city or key economic trading centre. However, the City of Cape Town illustrates how the creative industries can be used to generate local economic development and attract tourism.

4.6.6 *New technologies*

The real opportunity for the region must surely come from the new technologies such as datacasting and satellite technologies which can distribute multimedia information, communicate live across wide terrain and offer distance-learning solutions using Internet technologies. If the industry does not find ways to utilize these technologies, the region runs the risk of falling further behind the developed world and its information-rich societies.

The South African industry, in particular, both utilizes advanced and cutting-edge technologies such as DV and HD technologies, but also develops new technology for the industry. A local South African company, Bright Spark Technologies, for example, has

¹⁰⁷ *ScreenAfrica*, Aug. 2001.

¹⁰⁸ “Local beauty wins hearts of film-makers”, *BusinessDay*, 23 May 2001.

¹⁰⁹ “Cape Town to become a mini-Hollywood”, *The Star*, 29 Aug. 2001.

¹¹⁰ “CFC forging ahead on plans”, *Sithengi Daily News*, 13 Nov. 2001.

developed a performance animation system, Mimic which has attracted merchant bank backing as well as equity from an international partner. Mimic has already been involved in two large deals: one, a Canadian co-production for international distribution and also a Heatherwood Films co-production on wildlife.¹¹¹

Film-makers, exhibitors and distributors in the southern African region have all been slow in capitalizing on the opportunities associated with digital production and delivery of filmed entertainment. While there are a number of examples of how this technology is revolutionizing the film and television industry in the developed world (for example DOGME 95 the Danish film, The Blair Witch Project and the next Star Wars movies will all be filmed on digital format), examples from the developing world are far fewer.

One noteworthy developing-country digital production is *Third World Cop*, produced by Palm Pictures, shot entirely in Jamaica with 100 per cent Jamaican cast and crew. This production cost US\$500,000 and, very unusually, went into profit in Jamaica alone. Lucinio Azevedo made the first fully digital African film in 2000 called *Disobedience*, which cost under US\$200,000. Digital production therefore provides opportunities for African film-makers to recoup money on their productions and spend less time on complicated post-production processes and more time refining the creative content of their productions. This does, however, require an understanding by film-makers that their budgets should be smaller and less ambitious from a special effects and budget perspective. The use of digital technology for digital projection and online exhibition “will certainly trickle down to Africa”.¹¹² Sue-Ann Mackenzie writes in *ScreenAfrica*:

With digital projection, there is no degradation in quality from either repeated showings or from making multiple copies from a master. The cost of making copies, which is essentially copying a computer file, is insignificant compared with the US\$2,000 per print it currently costs for film. Shipping computer files to theatres would be much less expensive than shipping reels of 35mm films and these files could also be transmitted via satellite or Internet. However, with the cost savings accruing principally to movie distributors, conversion to digital is not likely to happen in the near term unless it is financed by the studios.¹¹³

In South Africa, a new production company, called D-V-8 Films was launched at the Sithengi market in November 2000. This company is a partnership of three well-known South African producers, Jeremy Nathan, Kobus Botha and Joel Phiri, who have agreed to pool resources and produce a selection of commercially viable feature length films in digital format under the DV8 label. Their intention was to make three feature films a year with modest budgets of about US\$150,000 per film. However at the Sithengi market in November 2001 they announced that 14 projects were selected for extensive development for the DV8 project. Finance will be sourced from equity investment, pre-sales and investment finance. The films are to be pre-sold and distributed in Africa by the new joint Film Resource Unit and Ice Media. International distribution will be handled by a combination of Ice Media and foreign sales agents and distributors.

Namibian Broadcasting Corporation is substantially upgrading its facilities from the traditional analogue technology into high-quality, high-versatile digital systems. They awarded the R 8 million contract to achieve this to a South African technology company.

¹¹¹ “Mimic for real”, *ScreenAfrica*, Nov. 1999.

¹¹² Jeremy Nathan. “Digital cinema – a future for African film-making?” *ScreenAfrica*, Feb. 2001.

¹¹³ Sue-Anne MacKenzie. “Global trends in filmed entertainment”, *ScreenAfrica*, Feb. 2001.

NBC is now the second southern African broadcaster to adopt a Quantel Clipbox solution. In 2000, the Botswana Broadcasting Corporation went on air with the Quantel Inspiration system.¹¹⁴

Key issue: New technologies such as digital production allow costs to be recouped quicker, more time to be spent on creative content and less time on complicated post-production. It is a significant opportunity waiting to be taken up by film-makers in the SADC region.

4.6.7 Copyright

There is a general lack of protection for intellectual property rights related to culture. As Box 4.7 shows, the World Intellectual Property Organization (WIPO) is dedicated to promoting the use and protection of intellectual property. Even with excellent legislation, intellectual property rights infringement is typically more acute where enforcement is weak. Some examples from the SADC region include:

- copyright protection of audio-visual products is a big problem in the southern African region;
- infringement is rampant in Mozambique, Angola and Swaziland. Moreover there is a general lack of copyright enforcement in some African countries;
- copyright infringement occurs in cinema, video and TV;
- TV infringement occurs when broadcasters re-run programmes for which they have a specific viewing agreement;
- video piracy is rampant in the region; and
- exhibitors do not report accurately on box office takings.

Key issue: Film and television products are not currently adequately protected by copyright legislation. Copyright protection and enforcement are essential for the SADC region as a whole.

All SADC countries, with the exception of Angola, Mozambique and Seychelles, are party to the Berne Convention. Swaziland is the only SADC country, which according to WIPO records, does not have a copyright legislation. For more information on the Small and Medium Enterprise (SME) Division of WIPO, the website is <http://www.wipo.int/sme>. For more details, see Annexes 4 and 5.

Box 4.7. Protection of copyright in the digital media

The field of copyright and related rights has expanded enormously with the technological progress of the past several decades, which has introduced new ways of worldwide communication, such as satellite broadcasting and compact discs. Dissemination of works via the Internet is but the latest development in these advances and raises new questions concerning copyright.

The World Intellectual Property Organization (WIPO) is deeply involved in the ongoing international debate to shape new standards for copyright protection in cyberspace. The organization administers the WIPO Copyright Treaty (WCT) and the WIPO Performances and Phonogram Treaty (WPPT) (often known together as the "Internet Treaties"). These treaties respond to the new challenges posed by the digital technology in the field of copyright and related rights. They clarify how the existing norms should be applied in the digital networked environment, adapt those norms somewhat to this environment, and include provisions to ensure the

¹¹⁴ *ScreenAfrica*, Aug. 2001.

applicability of technological protection measures and electronic rights management. Without this information, it would not be possible to exercise and enforce copyright and related rights on the Internet. Therefore, it is in the interests of all countries wishing to benefit from the expanding opportunities offered by the Internet to accede to these WIPO treaties and duly apply them.

For more information, visit the following website:

<<http://www.wipo.int/treaties/ip/wct/index.html>> and <http://www.wipo.int/treaties/ip/wppt/index.html>

For more information on the Small and Medium Enterprise (SME) Division of WIPO, the SME website is <http://www.wipo.int/sme>.

5. The state of training in the region

Introduction

While there are some excellent film and television training facilities in the region, the training delivered is generally fragmented and poorly coordinated. Also, accreditation or certification is rarely provided. However, with the adoption of the Skills Development Strategy in South Africa, there are now well-resourced and coordinated initiatives to bring film and television training in line with the new qualifications framework and to develop curricula based on unit standards. The Cape Film and Video Foundation has set up a sub-committee to address the issue of accreditation systems for the industry in relation to the National Qualification Framework. More particularly, the National Film and Video Foundation is actively working with the Sector Education and Training Authority for the media sector (MAPP SETA). This initiative can potentially have far-reaching consequences for training in the region.

5.1 Training geared towards beginnings

In Zimbabwe, the African Scriptwriters Development Fund conducts training for scriptwriters, for example. While there are a number of good scriptwriting training initiatives in southern Africa, that may generate technically good-quality scripts, they do not necessarily result in good quality productions. One of the biggest problems is that training is often too compartmentalized, with a lack of partnership between scriptwriters, directors and producers. As a result, there is currently some discussion in the industry about running a more integrated programme. A new initiative, “Breaking the Walls” is being developed by the African Scriptwriters Development Fund, SACOD, AVEA and Encounters as its partners. It would include producers, directors and scriptwriters being brought together from the conceptualization stage. These people would be required to partner up immediately. They are also planning to ensure that, unlike many scriptwriting programmes, no one will be required to bring a script to the workshops. Rather, the idea would be to provide each scriptwriter, producer and director team a story to work on. It is hoped that this gives the scriptwriter more freedom to develop the story in collaboration with the producer and director.¹¹⁵

5.2 Training geared towards producers

Audio Visual Entrepreneurs of Africa (AVEA) is based on the long-standing European producer-training programme, EAVE, funded by the EU media programme in Brussels. They provide the only development programme for producers in southern Africa, with training that involves in-depth analysis of company development together with financing, distribution and marketing strategies at national and international level. Support from the UNESCO Film and Training Unit in Zimbabwe, The British Council, The French Foreign Ministry and Filmförderung Baden-Württemberg, Germany.¹¹⁶ It was initially supposed to be conducted within the UNESCO film school but instead UNESCO agreed to fund a large part of the first year of operation in the year 2000.

¹¹⁵ Interview Pedro Pimenta.

¹¹⁶ Interview with Gina Bonmariage, 18 Oct. 2001.

5.3 UNESCO Film and Video Project

The key training institution in the SADC region is the UNESCO film and video training project in Zimbabwe, established in 1992 and funded by UNESCO and DANIDA. The donor agencies have worked in collaboration with the Ministry of Information in setting up this training facility. During its first four years, a one-year programme was offered, which replicated film training in Europe. At the end of this four-year period an assessment was conducted by UNESCO, the Zimbabwean government, DANIDA and members of the industry. It was found that the training offered was not suited to the African industry and a new programme was designed. This included short-term courses, workshops and seminars mostly aimed at people with none or very little previous training or experience in the industry. The institution runs an entry-level programme for three months which includes the whole production process from the idea to the script, directing, camera, sound, and editing and production management. There is a further one-month course where students choose a technical specialization such as camera work, editing, sound, etc. In 2001, 12 trainers were working in the institution, six people were employed full-time and 12 students were enrolled.

According to the chief technical advisor of the project, “The emphasis has been on training and not on education. We need more time to develop the craft of film-making.”¹¹⁷ Since 1992, US\$5 million has been invested and the project has excellent infrastructure. They made the transition to digital technology in 1996 and have good editing facilities. At time of writing, the donor agencies had put funding on hold until after the elections in Zimbabwe in 2002.

5.4 Specific training initiatives

5.4.1 Production training on the job

Most training in the region occurs on the job. It would be important to develop mechanisms, such as in South Africa, for accrediting and providing certification for on-the-job training.

5.4.2 Training offered by broadcasters

Both in Zimbabwe and in South Africa the broadcasters do a fair amount of training. The SABC and the ZBC provide training in production.

5.4.3 Community training

The Open Window Network in South Africa offers basic training for members of the community in production, distribution and exhibition.

5.4.4 Training geared towards children

In Zimbabwe, a centre produces children’s television and video productions called Chipawo. They offer editing, dubbing and voice-over services for organizations working

¹¹⁷ Interview with Pedro Pimenta, Chief Technical Advisor, UNESCO Film and Video Training Project, Harare, 16 Aug. 2001.

with children. While this is a small initiative (three people employed), it provides an opportunity for children to experience and participate in television production, thereby contributing to a pool of young people who may be interested in working in the industry at a later stage.

5.4.5 *Training geared towards women in film*

Women in Film and Television, based in Johannesburg invites applicants to submit requests for one-on-one exposure in various aspects of film and television, such as production, distribution, directing, and writing. WIFT then matches the applicant with the appropriate business or creative executive for a period of a day or two.

5.4.6 *Technikon training*

Pretoria Technikon in South Africa offers film training programmes and the local technikon in Harare, Zimbabwe and Windhoek, Namibia offer broad media studies courses.

6. Coordinating bodies and agencies active in the region

6.1 Coordinating bodies in the SADC region

Very few coordinating bodies are active in the region. Those that do exist tend to work beyond their original mandate to fill in the gaps. They are under-resourced and plagued by different and at times competing expectations from their constituencies. However, they would be the first port-of-call in developing a strategy to grow the industry.

6.1.1 Southern African Communication for Development (SACOD)¹¹⁸

SACOD is a coalition of film-makers from the southern African region, founded in 1986. Membership now stands at 38. Their offices are currently based in Johannesburg although they were previously based in Zimbabwe and rotate the location of their offices in different southern African countries. Their overall mission is to support and promote production and distribution of southern African videos and films that contribute to democracy, peace, popular participation, race, gender equality, development and cultural activity. Their activities in support of this mission include:

- Training – SACOD hosts structured discussions with their members. This is mainly achieved through the annual SACOD forum, where film and video directors, distributors and NGOs from the southern African region get together in order to screen and debate film and video productions made by SACOD members.
- Information and networking – This is achieved through sending out a newsletter, updating and managing their website and sending out e-mails to their members.
- Advocacy and lobbying – SACOD focuses on lobbying for local content quotas, which they believe should be set at 25 per cent minimum for all southern African broadcasters, as well as lobbying for increased commissioning of independent producers by southern African broadcasters. With regard to advocacy, SACOD developed a broadcasting charter for African broadcasters, which was adopted at a UNESCO conference held in Namibia. At a policy level, SACOD engages with individual national governments as well as the southern African Development Community (SADC) structures, with regard to the development of a media protocol.
- Mobile video units – SACOD is currently raising funds to launch a mobile video unit that will travel around the region screening African films and engaging audiences in discussions about the films. With funding from SUCO, SACOD has been operating several mobile video units in the southern African region including Swaziland, Lesotho and Zimbabwe. They intend expanding to Namibia, Zambia and Mozambique.

SACOD works with a number of partners, including the audio-visual entrepreneurs of Africa, the National Film and Video Foundation, The Independent Producers

¹¹⁸ Interview with Chris Kabwato, coordinator of SACOD, and SACOD Annual Report 2000.

Organisation, the southern African Broadcasters Association and the Media Institute of Southern Africa.

6.1.2 *The Media Institute of Southern Africa (MISA)*

The Media Institute of Southern Africa was established in 1992 to realize the aims of the Windhoek Declaration¹¹⁹ and specifically to promote media diversity, pluralism, self-sufficiency and independence amongst all players in the media in southern Africa. They have head offices located in Namibia and chapter offices located in other southern African countries. The head office has nine people in the secretariat while chapter offices are typically 2-4 people. 30 per cent of MISA's staff are women. MISA has historically concentrated on the print media but recently has started doing more work in the audio-visual industries. They are currently running campaigns in southern African countries concerning the freeing of the airways and liberalization of the broadcasting environment.

MISA's other activities include publications, a library and resource centre and a legal defence fund. MISA has observer status to the SADC. MISA's representation does not stop with southern Africa. It represents WAJA, the West African Association and NDIMA the East African Association.

Because of their location in Namibia, MISA has also been involved in mediating legislation in the country. They have assisted in the negotiation of the Namibian Film Commission. The Namibian Chapter monitors local content on TV, radio and print.

In Zimbabwe the MISA launched a three-month campaign to educate the public on the new broadcasting laws and regulations; they distributed booklets and pamphlets on the history, content and implications of these regulations

In Mozambique, the MISA office was only recently established and is in the process of defining its role more clearly. They are concentrating on the print media and trying to audit the number of newspapers in the country. They are running two programmes presently. One is aimed at accessing state information in the public's interest, such as the declaration of assets held by politicians. Second, they are looking to influence the composition of the Media Council, which was established by the constitution but is currently controlled by government. The most active chapter, in terms of interaction with the local film industry is ZIMA in Zambia. They are working on a strategic alliance with SACOD for the production of audio-visual material.¹²⁰

6.1.3 *Southern African Broadcasting Association (SABA)*

SABA is based in Windhoek and works to facilitate access to programmes by broadcasters in the region. It is a membership organization of public service and other broadcasting organizations, covering the countries of the SADC region. It works not only

¹¹⁹ The Windhoek Declaration was adopted in 1991 to protect and promote freedom of expression and of the media. See Annex 2 for the Windhoek plus 10 Charter on Broadcasting which was adopted at the 10th Anniversary of the Windhoek Declaration.

¹²⁰ Interview Catherine Sasman, MISA Head Office, Namibia.

with commercial broadcasters in southern Africa and the rest of the world but also with community and private broadcasters.

6.1.4 Regional co-production forum

An initiative launched at the Sithengi Market in Cape Town in 2001 is a co-production agreement between countries of the southern African region. The launch point for the initiative is the highly successful co-production between Zimmedia and MNET on the *Mama Africa* series. Ice Media (with offices in Zimbabwe, South Africa and now Namibia) and FRU have joined forces with Zimmedia and M-Net to initiate a forum for producers and broadcasters, to encourage greater cooperation and bi-lateral agreements between member nations of SADC. While it is early days yet, the initiative has support and a process which is consultative. Its progress should be carefully monitored.

6.2 Agencies working across the SADC region

These bodies are active in more than one country of the region in specific parts of the value chain namely, circulation (FRU, MDT, Sithengi) and delivery (ABN and Sithengi) and play an important role in integrating the film and TV industry across the region.

6.2.1 The Film Resource Unit (FRU)

FRU is a distribution agency, located in South Africa, which represents mainly southern African film-makers and has the rights for distribution of these products in African territories.

6.2.2 Media Development Trust (MDT)

The Media Development Trust is a non-profit welfare organization with around 200 members seeking to promote development through communication. As noted earlier, they distribute and produce high-quality socially conscious films and video. They have a video resource centre, which was launched in 1995 and carries 900 videos in different categories. They are also involved in public screenings and in the distribution of southern African productions in the region. Their videos are sold to NGOs, educational institutions, health centres, civic education and outreach programmes as well as to individual film enthusiasts. Together with FRU, the MDT has a monopoly on distribution of African productions. In addition, they market their catalogue of productions to African broadcasters and have distributed productions to the Zimbabwe Broadcast Corporation, the Namibian Broadcasting Corporation and Malawian television. There is much collaboration between FRU and MDT. They distribute each other's products and MDT seems to focus on territory "north of the Limpopo" while FRU's main market is in the south.¹²¹

6.2.3 African Broadcast Network (ABN)

ABN or the African Broadcast Network, based in South Africa, has been established to provide quality product and content to the broadcasters in Africa in return for their

¹²¹ MDT web site.

ability to sell advertising space to the big corporations. This new television network was launched in 2001. This broadcaster includes the African Bartering Company, which pioneered the concept of syndicated bartering with African broadcasters for advertising space. The bartering concept used by ABN works as follows: they will exchange advertising time with broadcasters for one hour of peak broadcasting time (extended to two hours in June 2001 and to 3 hours a day by the end of 2002), which they fill with quality programmes. They then sell the advertising time to advertisers. Thus, broadcasters receive programmes for free and ABN gets its income directly from advertisers.

The first countries to experience ABN were Ghana (GBC), Kenya (KBC), Zimbabwe (ZBC), Tanzania (ITV), Zambia (ZNBC) and Nigeria (AIT). Since October 2001, Swazi TV is a new partner of ABN.

ABN also conducts audience research in the countries to which they broadcast. For many southern African countries, such as Zambia and Botswana, audience research has never been done before.¹²²

It may be too early at this point to gauge whether ABN will support the development of an indigenous film and television industry.

The establishment of the African Broadcast network development could assist to improve the quality of broadcasting in southern African countries. This is a positive development even if ABN does not in itself substantially increase the production of African films and television productions.

6.2.4 Sithengi

Sithengi, the southern African International Film and TV Market, is held in Cape Town. It is one of Africa's leading media and entertainment events and is now well entrenched as an integral part of the annual international Market and Festival circuit. Box 6.2 outlines its Chief Executive Officer's strategic objectives. Sithengi is a world-class showcase for South African and southern African cinema, broadcasting and related industries. Each year there is an increase in the number of stands. Compared to 50 stands in 1988, in 1999 there were 65 stands including both the British and French Pavilions and an additional 25 desks. Interest from new countries saw two Swedish stands, a Portuguese stand, a Ghanaian one and a Nigerian Pavilion representing 25 producers. Thirty African countries received invitations to attend the market. In 2000 over 1,350 delegates from more than 40 countries attended. The Sithengi Market includes three core areas and holds a number of side events:

- *The product market* for the buying and selling of finished product. Sithengi conducts a comprehensive research programme to produce a catalogue of all available product. This is available to buyers and to delegates at the event and afterwards.
- *The Pitching Forum*, previously known as the co-production forum for the buying and selling of ideas for films and television programmes which have not yet been made but that require either development or co-production partners, or a combination of investment and pre-sales.

¹²² Interview with Uri van der Walt, African Broadcast Network, 1 June 2001.

- *The Sithengi World Cinema Screenings* to create a viable niche market for World Cinema in the way that a similar market has been created for World Music.
- *International Directors Speak* runs concurrently with the Cape Town Film Festival and allows key people associated with the Festival's films to share their experiences with delegates.

Box 6.1. CEO Mike Auret's three-year business plan for Sithengi¹²³

The objective is to create a financially sustainable market and deliver value to the clients of Sithengi.

1. Change Sithengi from an event management company to one that is involved in the development of product and producers, and helps producers, writers and film-makers access other markets.
2. Add value to Sithengi's sponsors through developing a World Cinema Festival and showcasing the films of developing countries with Africa at the centre.
3. Track all projects and measure success.
4. Develop pitches in association with SASWA to prepare producers and writers for Sithengi, initially in South Africa but later in other locations on the continent.

Sithengi generates substantial business. In 2000, business worth R40 million was conducted at Sithengi. It has recently focused on projects based on African stories, with African directors and whose principal photography will take place in Africa. This new focus has been hailed by the African Script Development Fund in Zimbabwe although there is still strong criticism that Sithengi is essentially a European market in Africa. Sithengi now has a new CEO, Mike Auret from Zimbabwe; film-makers believe that representation from Africa will increase as will international interest in the market. SACOD has argued that the industry needs a market where local product is sold to buyers from elsewhere and where broadcasters buy local product.

Box 6.2. First World Music, now World Cinema

Definition: World Cinema can be defined as cinema from around the world, a style of film-making that is **not** rooted in the mainstream (i.e. Hollywood).

Programme: Includes *Ylongu Boy*, an Australian film about culture clash featuring a cast of unknown Ylongu Aborigines; Gavin Hood's *In Desert and Wilderness* (made in Polish and sub-titled in English); and Ken Kaplan's *Pure Blood* (won the Best First Film Award at Rome's Fantafest 2001). Fanta Regina Nacro's *Close Up on Bintou from Burkina Faso* is part of the programme. Akin Omotoso's *God is African* and Bart Fouche's *Scooter Riders* are both from the Cape. *Malunde* and *Hijack Stories* have been financed by international money with the latter selected for this year's Cannes Film Festival as well as films from the Mama Africa series.

Sithengi has also begun to attend international markets to promote its market, hence its presence at the MIPCOM television market in Cannes in October 1999. Here it participated at the ScreenAfrica stand – the first time that South African companies had participated as exhibitors at MIPCOM. Boxes 6.3 and 6.4 give two attendees' views of the opportunities that arose. Core areas in which people expressed an interest included African cultural, travel and wildlife programming.

¹²³ "A new Sithengi", *ScreenAfrica*, Sep. 2001.

Box 6.3. Going to the marketplace: Example 1, Pakathi Films

Mark Newman from Pakathi Films attended MIPCOM for the first time, armed with five one-hour drama series, *Saints, Sinners and Settlers* and a documentary, *Aftermath – Women under Fire*, reported: “I made a lot of contacts. It’s a massive market place and it’s been a massive learning experience.”

Box 6.4. Going to the marketplace: Example 2, line producers

Johann van den Bergh of the Line Producers was visiting MIPCOM for the third time. He was able to secure five deals.

7. Summary and needs, assets and gap matrix

7.1 Opportunities and strengths

Table 7.1 provides a summary of the strengths and weaknesses of the film and television industry in South Africa, Zimbabwe, Mozambique and Namibia.

Table 7.1. Strengths and weaknesses of the film industry in SADC countries

Criterion	South Africa	Zimbabwe	Mozambique	Namibia
Infrastructure	Highly developed film industry infrastructure	Fairly developed infrastructure, strongest outside of South Africa, but declining due to economic downturn as well as competition from South Africa	Good, if small, infrastructure for video production	Small but sophisticated film industry infrastructure
Destination	Recognition as the leading destination for outbound commercial production	Prior to 1994, the highest number of films shot in the country outside of SA. Still has good infrastructure for location shooting	Developing location industry – since end of the war and revitalization of industry. Big Hollywood production, <i>Ali</i> , was shot in Maputo	Developing location industry, gaining new attention from government through Film Commission
Pricing	Internationally competitive pricing structure	Lower pricing than South Africa. Very low when using parallel market rates	Cheaper than South Africa and, possibly, Zimbabwe (although parallel market rate in Zimbabwe makes them more cost-effective). Equipment is more expensive if brought from South Africa due to high taxes	Cheaper than South Africa but a small industry with not all skills represented.
Personnel	Experienced industry personnel	Zimbabwe has been making films for 50 years and has trained personnel	Small well-trained core of producers, directors and crew particularly for video production	Small core of film-makers with minimal training and shortage in sound management, editing and finance skills
Service and production	High levels of service and good production values	Increasingly, service and production handled by South African companies but production companies like Mighty Movies support South African companies coming into the country to shoot commercials.	One or two facilitation companies for mainly South African productions. South African company, with mainly South African staff, facilitated Hollywood productions.	Developing industry with links to South African industry. Shortage of facilitation companies and poor coordination between local players.
Equipment and editing	Specialized equipment and post-production facilities	Good editing facilities although high end feature film and commercial editing is done in South Africa.	Limited editing equipment.	Very limited editing equipment (mostly using NBC)

Criterion	South Africa	Zimbabwe	Mozambique	Namibia
Weather, climate, location	Excellent weather and sought-after film locations	Excellent weather and sought-after film locations	Excellent weather and sought-after film locations	Excellent weather, interesting terrain with unique features
Marketing	History of effective marketing	Good marketing infrastructure. The publication African Film and TV is located in Zimbabwe and has published marketing documents for the industry in the past	Institute of Cinema may take on the role of marketing the country. Limited or no marketing currently	Poor marketing but identified as a priority for new Film Commission.
Reputation	Excellent international reputation	Has had a good reputation in the past – in relation to the rest of southern Africa (excluding South Africa).	Still becoming known as a location industry	Little known but increasingly respected.

7.2 Gap matrix based on needs and assets

Based on the analysis of the southern African film and television industry contained in this report, the following gap analysis has been developed. It is divided into four sections dealing with human and cultural capital development; business and industry development; market development and regulation and legislation. The recommendations made in Section 8 seek to close some of the gaps identified in the matrix presented in Table 7.2 below.

Table 7.2. Matrix of gap analysis for the southern African film and television industry

Need	Asset	Gap
Human and cultural capital development		
Enhance training for the film and television industry in all areas	Training institutions exist in South Africa, Namibia and Zimbabwe.	Training is not well-defined, not geared to business skills, not accredited. There is a duplication of facilities. There are few mentoring opportunities.
Enhance the capacity of SMMEs in this industry to manage production.	There are some successful production companies in the SADC region.	There is no formal training on how to manage a production company.
The development of cultural entrepreneurship	There are some production companies who are successful cultural entrepreneurs.	There is not enough understanding in the industry as a whole of how to be entrepreneurial i.e. how to access financing, draw up budgets and sell ideas to possible financiers.
Enhance representation of black people and women, especially at producer level.	There are talented people in all racial groups and across gender in the industry.	Broadcasters and donor agencies tend to commission products from long-established companies whose work they already know. Gender and racial relations remain conservative in the region.
Link training in script development with producers and distributors to ensure usable product.	Scriptwriting initiatives exist in South Africa and Zimbabwe.	Training courses which integrate the different skills of script development and production requirements across the region
Independent film-makers require skills to cost productions to both recover costs and to budget appropriately. Only a few independent film-makers in the region are	A number of independent film-makers are producing films. There are distribution agencies for product and funds (although limited) for production.	Ability and opportunities for deal-making Inability to influence spending power of the domestic market. Film financial skills inadequate.

Need	Asset	Gap
able to source funds for their own productions.	A model for financing in the form of shortfall guarantee exists in the South African market (Entertainment Guarantors).	Access to finance for SMME producers in order to qualify for shortfall guarantee.
People in the industry with specific skills in distribution, exhibition and marketing.	Distribution agencies and exhibitors exist in the region.	Lack of formalized training programmes or in-house mentorship opportunities in distribution, exhibition and marketing.
<i>Product, business and industry development</i>		
Provide producers with marketing, distribution and legal advice	In SA, Namibia and Mozambique there are Independent Producers Organizations. SACOD is well represented with producers from the region.	There is currently no advisory support facility for producers
A well-defined distribution pipeline for African products within each country, between SADC countries and between SADC countries and the rest of the world	Small distribution companies exist in the region. Most broadcasters have local-content quotas.	Broadcasters lack funds to commission or buy local content. Very small cinema-going audiences in the region with low income and poor theatrical infrastructure. Mobile video units are relatively expensive to operate. There is little or no coordination between countries in the SADC region for distribution.
Cooperation between industry players and government	Independent industry players exist. The industry creates jobs and contributes towards GDP.	The industry is not well organized and is not able to articulate its needs to government. Government needs to recognize the industry as a potentially viable economic sector and establish film funds to support the industry.
Enhance the capacity of SMMEs in this industry to access financing	Finances are being acquired through donor agencies and, in South Africa, from government and the private sector.	Limited finances to produce independent productions. No clear financing model in the region. Governments and broadcasters do not have dedicated resources for film.
To expand channels for exhibition and broadcasting of local product	Broadcasters exist in the SADC region with local content quotas. Some cinemas and informal exhibition venues exist.	Strategies for funding the exhibition and broadcasting of product are lacking.
Resource coordinating bodies such as SACOD to achieve their aims and objectives	Coordinating bodies exist in the region, are well regarded and have credibility.	Programme and project funds, as well as administration costs, are insufficiently funded for these coordinating bodies.
<i>Market development</i>		
Funds for distribution of local content	There are coordinating bodies and agencies to ensure distribution	There are general funds for production but no dedicated funds for distribution and marketing, either locally or internationally. Existing distribution agencies are small and under-resourced.
Coordinate SADC countries' presence at international markets	There is product to showcase from a range of countries within SADC	Only South Africa has a coordinating body, (new) and does not coordinate with other relevant agencies such as DTI, Foreign Affairs and Tourism. The proposed Film Export Council could achieve this domestically. There is no coordinating body in the region with this explicit aim.
Developing a specific niche for southern African film, video and television product	The SADC region is developing expertise in producing educational dramas and documentaries as well as wildlife.	A coordinated approach to developing this expertise further, showcasing the product at festivals and markets and selling the product locally and internationally.

Need	Asset	Gap
To expand the domestic market for local and regional product by educating people in the art of film-making and film literacy.	Delivery mechanisms exist for product. Southern Africa has a large, if poor population. This population is receptive to product that reflects life in the region.	Film exhibition sites are not always accessible to townships, high-density areas and rural populations. Rural areas are not well covered by broadcasters. Video machines and DVDs exist primarily in the urban market and for middle-to-high income groups. Cinema appreciation is not developed in any formal manner
To exploit the local economic potential of the film and TV industry clustered in capital cities (and elsewhere)	The industry is clustered in urban areas	National and local governments need to identify and expand positive spin-offs in the form of tourism, jobs and income from the presence of a film and TV industry. This can be done through branding, marketing and the provision of incentives and infrastructure. It requires a coordinated approach and collaboration between city officials and industry players.
Regulation and Legislation		
Co-production treaties and agreements, which include clear budget provision for research, distribution and marketing, both locally and internationally.	The region has product and there is an international market looking for more diverse product. South Africa has a co-production treaty with Canada and players in the region have entered into co-production agreements with other countries. The Sithengi film market provides an opportunity for co-production agreements.	Lack of representation of all players from the SADC region at Sithengi. Lack of targeting of key international players. Governments and industry players in the region have not made co-production agreements a priority either with international partners or with other SADC countries.
Film producers need to challenge censorship	Media Institute of South Africa has local chapters in most SADC countries	MISA local chapters are not engaging with local producers
Local film industry to benefit directly from foreign film productions.	The SADC region remains a preferred location for foreign films, although decreasing	Regulation of the location industry is inadequate to protect local technical capability. Incentives are insufficient to continue to attract foreign products.
Distributors and broadcasters need to maximize the exploitation of product since they own its copyright	Unexploited product exists in the warehouses and libraries of broadcasters and distributors	No legislation to enforce this product. Current copyright legislation has no set time period.

8. Conclusion

According to Namibian producer Bridget Pickering from Onland Productions, “film-making is a challenging combination of commerce and art ... foreign money is at present controlling most film-making efforts in this country [and elsewhere in the SADC region] and it will probably continue for a long time, unless the government launches a concerted effort in a pragmatic way to turn the situation around.”¹²⁴ There is a clear role for government policy in order to provide funding and an environment that supports and encourages the film and television industry.

Film-making offers an exceptional record of a country’s history, heritage, culture and contemporary life. The film and TV industry is also a sector of the economy that can employ people, earn foreign exchange and foster small and medium enterprises. The role of government is to mainstream this sector into the national economy. Therefore, it is appropriate that statistics about the sector be collected along with those on manufacturing, mining and agriculture. Small enterprises in the film industry should be eligible for government support to the SME sector, and to benefit from supply-side measures developed for manufacturing and export assistance. More than just a question of funding for films, those working in the film and television industry should be eligible for all the existing benefits, rights and conditions of employees in other industries. The cultural industries need to be lifted out of their marginalized status in the national economy. Internationally it is precisely these industries that have grown fastest in terms of employment and contribution to GDP in the economies of North America, Canada and Europe. The SADC countries have yet to experience this growth for the film and television industry. Governments in the region need to ensure an environment conducive to this growth and support industry players in their efforts to grow.

There are hundreds of film-makers in the SADC region. A central question for this research has been how to develop more entrepreneurial skills among film-makers in order to ease their reliance on either donor or government money before tackling a project. As this report shows, those who succeed in this industry are, in many respects, classical entrepreneurs who initiate, create and take risks. “Such people don’t make films, they force them into existence.”¹²⁵

This report also presents a series of recommended actions and plans to develop the business of film-making (financing, production management, producer courses, deal-making and distribution) along with the technical expertise of the art of film-making (scriptwriting and technical skills in production). A stable platform of skills will give rise to new projects and new initiatives in the SADC region. Many film-makers spoke of their dream project, the one movie they would love to make if they had the financing. The lesson to draw from those who have succeeded in this industry is that film-makers need to be concerned with not only the art but also the business of film-making – that is, that the art and creativity necessary to develop and produce these films and programmes be bolstered with the skills to also respond to the overarching industry concern with the distribution of the product and with making a profit.

¹²⁴ Frederick Philander. “Face to face with Bridget”, interview with Bridget Pickering, *The Namibian Weekender*, 20 Apr. 2001.

¹²⁵ Helena Spring, Videovision commenting on Anant Singh’s success in the industry, 18 Oct. 2001.

This is the first time the film and television industry has been documented in the SADC region. The passion, energy and creativity of its film-makers are impressive. It is hoped that this report contributes to the development of clear plans of action supportive of the industry and its players in each of the SADC countries.

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Film SA perspectives on the Industry

Africa Film and TV Direct

ScreenAfrica

Sithengi Daily News

Annex 1

List of all interviews

Name	Organization	Status	Country	Place in Value Chain
Bongiwe Ngcobo	New Directions, <i>Mama Africa</i> (M-Net)		South Africa	Production, Delivery Mechanism
Carl Fischer	MNET	CEO Magic Works	South Africa	Production
Chris Kabwato	SACOD	Head	Africa region: Zimbabwe, now relocated to South Africa	Coordinating body
Vicky Bawcombe	SASWA	Chair	South Africa	Beginnings
Doreen Nteta	National Arts Council	CEO	South Africa	Regulatory body
Gina Bonmariage	AVEA, NFVF	Head of AVEA and now on Secretariat of NFVF	South Africa	ALL
Harriet Gavshon and Brenda Goldblatt	Curious Pictures		South Africa	Production
Howard Thomas	African Position Systems, Entertainment economists	Independent consultant to NFVF, previous Editor of ScreenAfrica	South Africa	
Jurie van der Walt	ABN		African continent	Audience Consumption
Lindi Ndebele	Department of Arts, Culture, Science and Technology, South Africa	Head of Institutions including set up and monitoring of the NFVF	South Africa	Finance, promotion, coordination, legislation and monitoring
Helena Spring	Videovision		South Africa	Beginnings, Production, Circulation
Lisa Key	SCRAWL	Founder	South Africa	Beginnings and Production
Mike Dearham	FRU	Director	South Africa	Circulation
Snakes Thoke	CAFTEP	Head of Organization	South Africa	Production, Circulation and Delivery
Sylvia Matebula	Department of Arts, Culture, Science and Technology, South Africa	Director in charge of international relations with the SADC region	SADC region	ALL
David Max Brown	Film-maker, Producer		Swaziland	Production, Beginning, Circulation
Alfredo Libombo	Media Institute of Southern Africa		Mozambique	Coordinating body
Francisca Serrao	Iris Imaginações		Mozambique	Production
Joao Ribeira	Cool Productions		Mozambique	Production
Lucinio Azevedo	Ebano Multimedia		Mozambique	Production
Sol Carvalho	Promarte		Mozambique	Production
Don Edkins	Ex SACOD, now Day Zero		Lesotho	

Name	Organization	Status	Country	Place in Value Chain
Dan Sango	Chipawo Children's Media Center		Zimbabwe	Production
Godwin Mawuru	Consultant at Chipawo	Director of film Neria	Zimbabwe	Production
John Riber	Media for Development Trust		Zimbabwe	Production, Circulation
Lavinia Mushamba	MDT	Distribution Manager	Zimbabwe	Circulation
Mike Hundu	Media Associates		Zimbabwe	Production
Nakai Matema	Ice Films		Zimbabwe	Production
Paul Hughes	Mighty Movies		Zimbabwe	Production
Pedro Pimento	Chief Technical Advisor UNESCO Film and Video Project		Zimbabwe	
Sarah Chiumbu	Media Institute of Southern Africa (MISA)		Zimbabwe	Coordinating Body
Aune Shipanga	Namibian Broadcasting Corporation	Controller TV Programmes	Namibia	Production, Circulation and Delivery
Bridget Pickering	Ice Media	Film-maker	South Africa, previously Namibia	Production and Beginnings
Carla Hoffman	Mubasen	Co-owner, and film producer	Namibia	Beginnings and production
Catherine Sassman	MISA Head Office		Namibia	Delivery
Cecil Moller	NIFA	Co-owner and film-maker	Namibia	Beginnings and production
Damien Morel	Franco-Namibian Cultural Centre	Cultural Officer	Namibia	Circulation, Delivery, Audience Development
DeeDee Yates	Ford Foundation	Grantee/ Project Liaison	Namibia	Finance
Dudley Viall	Quiet Storm, previously Afrinature	Company owner, film-maker	Namibia	Beginnings, production
Ester Haixwema	Namibian Broadcasting Corporation	Gender Desk	Namibia	Production, Delivery
Frederick Philander		Film-maker, Journalist	Namibia	Beginnings, Production and Audience Development
Jennifer Bassingthwaite	NIFA	Co-owner and film producer	Namibia	Beginning, Production
Sarry Xoagus	Namibian Broadcasting Corporation	Gender Desk	Namibia	Production, Delivery
Vickson Hangula	Homebrewed Productions	Company owner and film-maker	Namibia	Beginnings and production
Vincent Xoagub	Ministry of Broadcasting and Information	Acting as secretariat of Film Commission	Namibia	All
Zoe Titus	MISA Head Office		Namibia	Delivery

Annex 2

Intellectual property, copyright and related rights and collective management of rights

Intellectual property

Intellectual property (IP) relates to the type of property that results from the creations of the human mind, the intellect (creativity). The law which protects such creations is known as intellectual property law. This is to say once an individual or an enterprise considers that he/it has made such a creation it is important to take measures to legally protect the creation. Such measures are known as acquisition of IP rights. Once IP rights are acquired the creator would have exclusive right to legally use the creation for commercial purposes (economic gains). Others can lawfully use the creation for commercial purposes only after the owner of the IP right has granted consent, usually after an agreement of some form of remuneration (usually known as royalties). The effective use of such IP rights would not only enhance the competitiveness of the holder, be it an individual, small, medium or large enterprise, it will also create opportunities that would lead to benefits that can ultimately be translated into financial gains. IP is usually divided into two branches known as “industrial property” and “copyright.” Different types of IP rights can be used in order to maximize the benefits resulting from protected creations (product/work). For more information on the existing types of IP rights visit the following website:

http://www.wipo.int/sme/en/ip_business/acquire_protection.htm

What is copyright?

Most of the creations (works) in the cultural sector/industry are protected by copyrights and other rights related to copyright generally known as “related rights” or in some cases “neighboring rights”.

When a person creates a literary, musical, scientific or artistic work, he is the owner of that work and is free to decide on its use. That person (called the “creator” or the “author” or “owner of rights”) can control the destiny of the work. Copyright is a legal term describing rights given to that person for his literary and artistic works. Copyright protection covers literary works such as novels, poems, plays, reference works, newspapers, computer programs, databases, films, musical compositions; and artistic works such as paintings, drawings, photographs, sculpture; architecture; advertisements, maps and technical drawings.

The economic rights are the rights of reproduction, broadcasting, public performance, adaptation, translation, public recitation, public display, distribution, and so on. The moral rights include the author’s right to object to any distortion, mutilation or other modification of his work that might be prejudicial to his honor or reputation. Both sets of rights belong to the creator who can exercise them. The exercise of rights means that he can use the work himself, can give permission to someone else to use the work or can prohibit someone else from using the work. The general principle is that copyright protected works cannot be used without the authorization of the owner of rights. Limited exceptions to this rule, however, are contained in national copyright laws. In principle, the term of protection is the creator’s lifetime and a minimum of 50 years after his death.

These legal aspects are specified in international conventions to which most countries are now party. On their accession, member States should have national legislation that is in line with the international standards. At the international level, the economic and moral rights are conferred by the Berne Convention for the Protection of Literary and Artistic Works, commonly known as the “Berne Convention”. This Convention, which was adopted in 1886, has been revised several times to take into account the impact of new technology on the level of protection that it provides. It is

administered by the World Intellectual Property Organization (WIPO), one of the specialized international agencies of the United Nations system. Angola, Mozambique and Seychelles are the only SADC member states which are yet to accede to the Berne Convention, though all SADC member states have national copyright legislation.

A created work is considered protected by copyright as soon as it exists. There is no formality to be complied with, such as registration or deposit, as a condition of that protection. Mere ideas in themselves are not protected, only the way in which they are expressed. According to the Berne Convention literary and artistic works are protected without any formalities in the countries party to that Convention. However, many countries have a national copyright office and some national laws allow for registration of works for the purposes of, for example, identifying and distinguishing titles of works. In certain countries, registration can also serve as prima facie evidence in a court of law with reference to disputes relating to copyright. It is important to note that ownership of copyright of a creation does not necessarily mean physical ownership of the said creation e.g. ownership of a copy of a novel does not mean ownership of the copyright of the said novel.

The 1994 Agreement on Trade-Related Aspects of Intellectual Property Rights (or TRIPS Agreement), which is administered by the World Trade Organization (WTO), as well as the WIPO Copyright Treaty (WCT) incorporate this international protection.

For more information visit the following website:
<http://www.wipo.int/treaties/ip/berne/index.html>

What are related rights?

Whereas the rights provided by copyright apply to authors, “related rights”, also known as “neighboring rights” concern other categories of owners of rights, namely, performers, the producers of phonograms and broadcasting organizations. Related rights differ from copyright in that they belong to owners regarded as intermediaries in the production, recording or diffusion of works. The link with copyright is due to the fact that the three categories of related rights owners are auxiliaries in the intellectual creation process since they lend their assistance to authors in the communication of the latter’s works to the public. A musician performs a musical work written by a composer; an actor performs a role in a play written by a playwright; producers of phonograms – or more commonly “the record industry” – record and produce songs and music written by authors and composers, played by musicians or sung by performers; broadcasting organizations broadcast works and phonograms on their stations.

At the international level, related rights are conferred by the International Convention for the Protection of Performers, Producers of Phonograms and Broadcasting Organizations, better known as the “Rome Convention”. This Convention was adopted in 1961 and it is jointly administered by the United Nations Educational, Scientific and Cultural Organization (UNESCO), the International Labour Organization (ILO) and WIPO. As of February 15, 2002, among SADC member states only Lesotho had acceded to this convention. However several SADC member states do have national legislation on related rights.

The basic related rights granted are, in general, the following:

Performers: are provided the rights to prevent fixation (recording), broadcasting and communication to the public of their live performances without their consent, and the right to prevent reproduction of fixations of their performances under certain circumstances; the rights in respect of broadcasting and communication to the public may be in the form of equitable remuneration rather than a right to prevent. Due to personal nature of their creations, some national laws also grant performers moral rights, which may be exercised to prevent unauthorized uses of their name and image, or modifications to their performances which present them in an unfavorable light.

Producers of phonograms: are granted the rights to authorize or prohibit reproduction, importation and distribution of their phonograms and copies thereof, and the right to equitable remuneration for broadcasting and communication to the public of phonograms.

Broadcasting organizations: are provided the right to authorize or prohibit rebroadcasting, fixation and reproduction of their broadcast.

Also, the WIPO Performances and Phonograms Treaty (WPPT) grants protection to the performers in sound performances and producers of phonograms, particularly in the digital environment.

Though the duration of protection of related rights may differ from country to country the minimum period provided by the Rome Convention is twenty years. However the WTO agreement on Trade Related Aspects of Intellectual Property Rights (TRIPS) and the WPPT provide 50 years of protection to the rights of performers and producers of phonograms.

The 1994 Agreement on Trade-Related Aspects of Intellectual Property Rights (or TRIPS Agreement), which is administered by the World Trade Organization (WTO), incorporates or refers to this international protection.

For more information visit the following website:
<http://www.wipo.int/treaties/ip/rome/index.html>

Collective management of rights

The exclusive right of the author to exploit his work or authorize others to do so is the basic element of copyright, and such a right, where recognized, is also important for the beneficiaries of related rights. An exclusive right can be enjoyed to the fullest extent if it may be exercised individually by the owner of the right himself. In such a case, the owner maintains his control over the dissemination of his work, can personally take decisions on the economic conditions of its exploitation and can also closely monitor whether his rights are duly respected. As early as at the time of the establishment of the international copyright system, there were, however, certain rights that their owners were unable to exercise individually, and later, with the ever newer waves of new technologies, the field in which individual exercise of rights was impossible or, at least, impractical, became constantly wider.

The reason for which, in a number of cases, copyright and related rights cannot be exercised individually is that the works and/or the objects of related rights are used by a great number of different users. An individual author or other rights holders, in general, does not have the capacity to monitor all the uses, to negotiate with users and to collect remuneration. In such a case, collective management of rights is the appropriate solution. It is obviously a great advantage also for users since it decreases their administrative costs and facilitates lawful use. The importance of collective management societies is crucial especially where they provide “one stop shop” services, a coordinated collective management of all relevant rights, established on a global basis. These can go as far as the organization of public awareness campaigns, training and providing legal advice and assistance on issues such as the signing of contracts between the owners of copyright and related rights works and users of such works, where implications of intellectual property must be taken into account.

Given the importance of this aspect of the protection of copyright and related rights, a new WIPO guide on “Collective Administration of Copyright and Related Rights” is under preparation and will be published soon. It describes the main fields of collective management, analyzes the most important issues of this form of exercising rights, including the digital environment and offers some basic principles for the establishment and operation of collective management organizations.

All of the SADC member states except for Angola, Botswana, Lesotho, Seychelles and Swaziland have copyright societies. Namibia, South Africa, Zambia and Zimbabwe have private copyright collecting societies, while the rest have either parastatals or State-funded societies. In most cases, the “parastatal” collective management societies have dual responsibility i.e. that of administering the economic rights of their members but also that of enforcing the provisions contained in the national legislation e.g. in Malawi, Mauritius and Tanzania.

For more information visit the following website: <http://www.wipo.int/africa/en>

Current status of copyright protection in the SADC countries

WIPO has a long history of cooperation with SADC countries in the field of Copyright in which it has provided legal advisory and technical assistance aimed at modernizing and/or establishing national copyright protection regimes.

As of April 30, 2002, none of the SADC States have ratified neither the WPPT nor the WCT. However it is important to note that initiatives are underway in Mauritius, Malawi, United Republic of Tanzania and soon it is hoped Botswana and Mozambique to ratify the two treaties.

All SADC countries, with the exception of Angola, Mozambique and Seychelles, are party to the Berne Convention. Swaziland is the only SADC country, which according to WIPO records, does not have a copyright legislation. In the remaining Member States, copyright is protected as described in the list below;

Angola – Copyright Act N 4/90 of March 10, 1990

Botswana – Copyright and Neighboring Rights Act No. 8 of April 2000

Democratic Republic of Congo – Copyright and related rights are protected by Order no. 86-033 of April 5, 1986

Lesotho – Copyright Order No. 13 of 1989 which is currently being reviewed

Malawi – Copyright Act No. 9 of April 26, 1989 which is currently being amended to comply with current international norms

Mauritius – Copyright Act No. 12 of July 1997

Mozambique – Copyright Act No. 4 of February 1997

Namibia – Copyright and Neighboring Rights Act No. 6 of April 14, 1994

South Africa – Performers' Protection Act No. 11 of 1967, Copyright Act No. 98 of 1978, as amended by respective Copyright Amendments Acts No. 56 of 1980, No. 66 of 1983, No. 52 of 1984, No. 39 of 1986, No. 13 of 1988, No. 61 of 1989 and No. 1125 of 1992, Intellectual Property Laws Amendments Act of 1997

Seychelles – Copyright Act No. 25 of December 29, 1982 and the Copyright (Registration) Regulations No.12 of February 14, 1984

Tanzania – Copyright and neighboring Rights Act No. 7 of June 2, 1999

Zambia – Copyright and Performance Rights Act No. 44 of December 31, 1994

Zimbabwe – Copyright Act of 2001

Annex 3

National copyright offices in the SADC region

Angola

Ministry of Culture
National Institute for Cultural Industries (INIC)
National Directorate of Entertainment and Copyright

Address:
Rua Civilo de Conceição 72 andar
Luanda

Mailing address:
Caixa Postal 1252
Luanda

Telephone: (244 2) 33 13 71
Telefax: (244 2) 33 13 62

Last information communicated: January 2001

Botswana

Ministry of Commerce and Industry
Department of the Registrar of Companies,
Business Names, Trade Marks, Patents and Designs

Address:
P.O. Box 102
Gaborone

Telephone: (267) 580 754
Telefax: (267) 371 539; 580 987
Telex: 2674 TRADE BD
E-mail address: roc.mci@gov.bw

Last information communicated: October 2001

Democratic Republic of Congo

Ministry of Culture and the Arts
Directorate of Research, Planning and International Cultural
Relations
Secretariat General of Culture

Address:
B.P. 3090
Kinshasa I

Last information communicated: June 1997

Lesotho

Office of the Registrar General
Copyright Office

Address:
P.O. Box 52
Maseru 100

Telephone: (266) 31 30 34
Telefax: (266) 31 01 94
Telex: 4228 SADCTU LO

Last information communicated: January 2002

Malawi

Ministry of Sports and Culture
Copyright Society of Malawi (COSOMA)

Address:
P.O. Box 30784
Lilongwe 3

Telephone: (265) 751 148; cellphone: 865 211
Telefax: (265) 752 717
E-mail address: cosoma@sdpn.org.mw

Last information communicated: January 2001

Mauritius

Ministry of Arts and Culture
(Mauritius Society of Authors (MASA))

Address:
7th Floor, R. Seenevassen Building
Maillard Street
Port Louis
Mauritius

Telephone: (230) 212 5848
Telefax: (230) 212 9366
E-mail address: copyrightsoc@intnet.mu

Last information communicated: February 2002

Mozambique

Ministry of Culture and Sports
National Institute of Book and Records
Department of Copyright

Address:
Av. 24 de Julho 1921
Maputo

Mailing address:
P.O. Box 4030
Maputo

Telephone: (258 1) 42 02 57; 42 03 73
Telefax: (258 1) 42 02 09

Last information communicated: January 2001

Namibia

Ministry of Information and Broadcasting
Copyright Services

Address:
Government Offices
Provost Building
Windhoek

Mailing address:
Private Bag 13344
Windhoek, 9000

Telephone: (264 61) 22 22 46; 22 10 77
Telefax: (264 61) 22 49 37
Telex: 665

Last information communicated: December 1994

Seychelles

Ministry of Youth and Culture

Address:
Ministry of Youth and Culture
PO Box 1383
Victoria
Mahe

Telephone: (248) 321 333
Telefax: (248) 322 113
Telex: 2305 MINED SZ

Last information communicated: January 2000

South Africa

Department of Trade and Industry
Office of the Registrar of Patents, Trade Marks, Designs and Copyright

Address:
Private Bag X400
Pretoria 0001

Mailing address:
Zanza Buildings
116 Proes Street
Pretoria 0001

Telephone: (27 12) 310 8700
Telefax: (27 12) 323 4257
Telex: (9) 35-0168 TRIN
E-mail address: mcdonaldn@dti.pwv.gov.za

Last information communicated: November 2001

Swaziland

Ministry of Justice
Registrar General's Office

Address:
3rd Floor Justice Building
Mbabane

Mailing address:
P.O. Box 460
Mbabane

Telephone: (268 40) 46 010/9
Telefax: (268 40) 43 531

Last information communicated: February 2000

United Republic of Tanzania

Copyright Society of Tanzania (COSOTA)
Business Registrations and Licensing Agency (BRELA)
Ministry of Industry and Trade

Address:
Cooperative Bldg.
Lumumba Street
Dar es Salaam

Mailing address:
P.O. Box 9393
Dar es Salaam

Telephone: (255 22) 812 760839 (Mobitel)
Direct lines: (255 22) 2180048; 2180139; (255 22) 2180141
Telefax: (255 22) 2180371; 2184727
Telex: 41689 INDIS TZ
E-mail address: usajili@intafrica.com

Last information communicated: February 2001

Zambia

Ministry of Information and Broadcasting Services
Copyright Administration

Address:
P.O. Box 51025
Lusaka

Telephone: (260 1) 25 17 73; 25 17 66
Telefax: (260 1) 25 34 56; 25 34 57;
(260 1) 25 17 67
Telex: 40113 INFORM ZA

Last information communicated: February 2002

Zimbabwe

Ministry of Justice, Legal and Parliamentary Affairs
Office of the Controller of Patents, Trade Marks and Industrial Designs

Address:

Private Bag 7704

Causeway

5th Floor Forner House

Corner Leopold Takawira Street and Samora Machel Avenue

Harare

Telephone: (263 4) 775 544/6

(263 4) 773 443

(263 4) 781 835

Telefax: (263 4) 772 999; 772 993

E-mail address: zimpat@gta.gov.zw

Last information communicated: February 2002

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