The **AFRICAN FILM Industry**

Trends, Challenges and Opportunities for Growth
Africa's booming film and audiovisual industry

The production and distribution of film and audiovisual works is one of the most dynamic growth sectors in the world. Thanks to digital technologies, production has been growing rapidly in Africa in recent years. The case of "Nollywood", with about 2,500 films made each year, is emblematic in this respect. It has enabled the emergence of a local industry of production and distribution with its own economic model. Yet across most of the continent, the economic potential of the film and audiovisual sectors remains largely untapped. It is estimated that these sectors account for US$5 billion in revenues in Africa and employ 5 million people.

For the first time, a complete mapping of the film and audiovisual industry in 54 States of the African continent is available, including quantitative and qualitative data and an analysis of their strengths and weaknesses at the continental and regional levels.

The report proposes strategic recommendations for the development of the film and audiovisual sectors in Africa and invites policymakers, professional organizations, firms, filmmakers and artists to implement them in a concerted manner.
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The AFRICAN FILM Industry

Trends, Challenges and Opportunities for Growth
No development can be truly sustainable without a human-centred approach. It is with this conviction that UNESCO has engaged in advocacy and concrete actions to demonstrate the contribution of culture to sustainable development, while recalling the UNESCO’s Culture Conventions and strategic projects which constitute a unique framework for international cooperation and the implementation of public policies at the national level.

UNESCO has worked with Member States to strengthen statistical information gathering mechanisms in the cultural field by supporting the efficient and relevant collection of data on the cultural sector. These data help to inform policy developments around the world as well as to monitor the evolution of culture as a sector of activity.

All over the world, people are driven by the fundamental need to express themselves creatively. This creativity, a sign of richness and diversity, serves as a foundation for sustainable development, as recognized by the 2030 Agenda for Sustainable Development. A source of economic empowerment, creativity contributes to inclusive employment and entrepreneurial opportunities in the cultural and creative industries. However, the COVID-19 pandemic has profoundly impacted the entire cultural ecosystem, further highlighting its fragility. As shown by the recent UNESCO report on the cultural and creative industries in the face of COVID-19, job losses in this domain are conservatively estimated at 10 million worldwide, which suggests a sudden drop in employment that profoundly affects the livelihoods of creative workers. Yet, COVID-19 has also demonstrated the importance of culture and creativity as a source of resilience, community solidarity and social connection, as well as its ability to evolve and adapt.

The blossoming of cultural and creative industries, particularly in Africa, and notably the film and audiovisual industry, represents a major interest for sustainable development and the promotion of the continent’s rich cultural diversity. In a region where many aspects of the industry remain informal, the film and audiovisual industry in Africa is currently facing unprecedented challenges that further accelerate the digital transition.

This report not only provides an overview of these challenges, whether in terms of intellectual property, the role of women or training for professionals in the sector, but also puts forward a study of strategic models that have demonstrated their effectiveness, in order to propose measures for the sustainable development of this major cultural field.

It stems from the dual aspiration to map the sector and to offer support for actions on the ground. This is all the more relevant since the report is in line with the priority that UNESCO gives to Africa, the latter placing culture for sustainable and inclusive development at the core of its programmes, in keeping with the African Union’s Agenda 2063 and its “Charter of African Cultural Renaissance” adopted in 2006.

This report is the result of a long process. UNESCO has undertaken to provide technical support for inventorying existing capacities and identifying issues that contribute to the revitalization of Africa’s cultural and creative industries, as a follow-up to the 2019 UNESCO Forum of Ministers of Culture. Indeed, the urgent need to improve access to data on the cultural sector and to promote research, manifested by civil society during the ResiliArt debates held on the African continent during the COVID-19 pandemic, requires an immediate response.

Thus, with this detailed mapping of the film and audiovisual industry in 54 States of the African continent, UNESCO seeks to support national and local decision-makers in their decision-making, by fostering the sharing of information and the exchange of good regional practices. In this way, we reaffirm our commitment to playing a greater role in supporting and acting on the ground to protect, enhance and transmit the cultural heritage of the African continent to future generations in all its rich diversity.

Ernesto Ottone R.
Assistant Director-General for Culture, UNESCO
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Executive summary

Over the past 18 months, many industries have experienced unprecedented disruptions around the world, including in Africa. For the global film and audiovisual sector in particular, it has been a time of tremendous challenges, with the closure of cinemas and the postponement of most production activity, but also of unparalleled opportunity, as audiences flocked to online platforms to satisfy a deep hunger for connection, learning and entertainment.

Overall, the film and audiovisual sector in Africa remains historically and structurally underfunded, underdeveloped and undervalued, generating only US$5 billion in annual revenue out of a potential US$20 billion, according to the Pan African Federation of Filmmakers (FEPAFI).1 This report shows that today, many aspects of the industry are still informal, with only 44% of countries having an established film commission and 55% of countries having a film policy. Regulations, when they do exist, are sometimes seen as obstacles rather than enablers. Piracy remains rampant and two-thirds of countries estimate the share of women to be less than 10%. In the Central and West Africa regions, 50% of respondents estimate the share of women to be also below 10%. However, several Arabic-speaking and English-speaking countries, including Tunisia, Morocco, Nigeria, Kenya, South Africa, Rwanda and Zimbabwe, showed encouraging dynamics, with 30% or more of women in front of and behind the camera.

Regarding freedom of expression, little progress has been observed in recent years: 87% of respondents report that there are explicit or self-imposed limitations to what can be shown or addressed on screen.

From an infrastructure perspective, the distribution segment of the African film and audiovisual value chain is undergoing profound changes. Africa’s cinema network is already the least developed in the world with a total of 1,651 screens, namely one per 787,402 people. As the COVID-19 pandemic shut down cinemas across the continent for the better part of a year, it exacerbated the worry that cinema distribution may forever fail to take off in some countries. Nevertheless, the sector does present some bright spots. For example, before the pandemic, new French investments in francophone West Africa, Morocco and Tunisia were expected to triple the number of screens in the region by 2024.2 Most impressively, Nigeria emerges as a true success story, showing a 200% increase in cinema locations between 2015 and 2020, with the total number of Digital Cinema Initiative (DCI) compliant3 screens reaching 237 in 2020. Home-grown Nollywood films now rival Hollywood blockbusters at the box office.

Meanwhile, after the opening of some of the last markets such as Ethiopia, Zimbabwe and Côte d’Ivoire, the African broadcast industry is now almost fully liberalized, with over 1,000 private television channels operating across the continent – a number similar to India. Africa’s transition process from the analogue broadcasting system to digital terrestrial television (DTT) has also finally taken off, albeit with much delay. While the pay television segment of the market, dominated by South Africa’s Multichoice (20.1 million subscribers), China’s StarTimes (7.8 million subscribers) and France’s Canal+(6 million subscribers) continues to grow and shows solid revenue, free-to-air television broadcasting remains overregulated, prone to disorganization and in search of viable business models. Although the switch to DTT has not led to the expected boom in local television content as the advertising pool remains small, a major cause for optimism is the emergence of very dynamic local markets for African television series, especially in Côte d’Ivoire and Senegal, through bold investment from local broadcasters and Canal+.

However, the real game changer for the African film and audiovisual industry is the ongoing digital revolution, which started some 20 years ago and was accelerated by the COVID-19 pandemic. Today, technology, affordable digital film equipment and the new ability to distribute but also monetize content directly to consumers via online platforms (from YouTube, other social media and Netflix to local mobile video services) is giving rise to a new economy for African content creators which bypasses traditional gatekeepers. In countries like Kenya, Rwanda, Ethiopia and Senegal, for instance, new generations of filmmakers are now able to live from the online revenue generated by their work.
Africa has all the human and economic resources, and all the energies and talent to shape its own destiny. It may take time, but it does not matter—the movement has begun and a thousand creative fires are already smouldering. A torrent of images, narratives and stories that nothing can suppress is about to flow. Africa will inevitably soon get into its stride and pick up steam.

**Gaston Kaboré**
Filmmaker (Burkina Faso) • Interview by Olivier Barlet with Gaston Kaboré for Africultures, Ouagadougou 2007

In addition, the long-term efforts of various stakeholders seeking to develop African talent are finally bearing fruit. A new generation of skilled, gifted and daring African filmmakers, such as Tunisia’s Kaouther Ben Hania (*The Man Who Sold His Skin*), Côte d’Ivoire’s Philippe Lacôte (*Night of the Kings*), Democratic Republic of the Congo’s Dieudo Hamadi (*Downstream to Kinshasa*), Senegal’s Mati Diop (*Atlantics*) and Alain Gomis (*Félicité*), Kenya’s Wanuri Kahiu (*Rafiki*) and Sam Soko (*Softie*), Sudan’s Suhaib Gasmelbari (*Talking About Trees*), Nigeria’s Kenneth Gyang (*Olòturé*), Lesotho’s Lemohang Jeremiah Mosese (*This is Not a Burial, It’s a Resurrection*) and Zambia’s Rungano Nyoni (*I Am Not a Witch*) are attracting local and international attention, thereby contributing to the emergence of a new African soft power, alongside their counterparts in music, fashion and the visual arts.

Through the growth of digital platforms, African films such as those just mentioned, but also series and other formats, are available for the whole world to discover and enjoy for the first time in history. Here, technology coincides with a global movement towards more diversity on screen, opening doors for African filmmakers to find new markets both at home and abroad. As African stories become more globally appealing, African producers are attracting the interest of new, non-historical partners such as the United States and China. To date, these stakeholders have focused mainly on the large English-language markets of South Africa, Nigeria and Kenya, but their ambition to expand across the continent is indicating a shift to a future in which the African continent has the potential to generate sustainable business models, breaking with traditional subsidy-based funding models. However, it is necessary to put in place effective policies coupled with adequate resources to regulate and supervise the market.
National governments can have a major impact through policy and the development of enabling environments. There are positive signs that countries across the continent are waking up to the potential of their creative industries and more specifically of film and television. In this regard, at least seven countries, including Zambia, Zimbabwe and Sudan, are currently working on draft film policies, while a number of others are updating existing documents.

Moreover, in this tumultuous period, it is becoming increasingly urgent for African governments to establish strong national, regional and continental strategies to take control of their fast growing creative sectors. Consequently, this report identifies four potential blueprints for growth: the Nollywood model, the Auteur model, the Service model and the Festival model. Particular attention must be paid to addressing current industry trends and challenges in an informed and collective manner. Only in this way can States ensure that their past, present and future creative products are protected, preserved and developed, and that their cultural and commercial value benefits Africa and contributes to its global outreach.

Why not build a world of diversity for humankind, enabling everyone to conserve their richness? This is a position I have maintained from the outset because I believe in the universality of being, of our nature and our life. Cinema is universal and can show us the way.

Souleymane Cissé
Filmmaker (Mali) • Interview by Olivier Barlet with Souleymane Cissé for Africultures, Pontarlier 2005

The more Africa is forgotten, the more the world must be reminded of it.

Mahamat-Saleh Haroun
Filmmaker (Chad)
Interview by Olivier Barlet with Mahamat-Saleh Haroun for Africultures regarding A Screaming Man (Un homme qui crie), Cannes 2010

“Why not build a world of diversity for humankind, enabling everyone to conserve their richness? This is a position I have maintained from the outset because I believe in the universality of being, of our nature and our life. Cinema is universal and can show us the way. — Souleymane Cissé, Filmmaker (Mali) • Interview by Olivier Barlet with Souleymane Cissé for Africultures, Pontarlier 2005

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Souleymane Cissé
Filmmaker (Mali) • Interview by Olivier Barlet with Souleymane Cissé for Africultures, Pontarlier 2005

The more Africa is forgotten, the more the world must be reminded of it.
Introduction

OBJECTIVES OF THE STUDY

In November 2020, UNESCO launched an exploratory study on the film and audiovisual industry in Africa as part of its commitment to the diversity of cultural expressions and as a contribution to the development of dynamic cultural and creative industries (CCIs) on the continent. The results of this study are presented in this report. It provides a mapping of the film and audiovisual industry in the 54 States of the African continent, an analysis of their strengths and weaknesses, and also recommendations for actions at the continental, regional and national levels. The overarching goal of this report is to propose a road map for the development of this strategic sector and to assist Member States in the implementation of relevant policies.

A NEW GLOBAL AWARENESS OF THE POTENTIAL OF THE CREATIVE INDUSTRIES

This report comes at a time of new global collective interest about the strategic role that CCIs can play in the economic growth of emerging countries, with several regional and international institutions identifying CCIs as a priority area. In 2017, the African Union finalized the formal establishment of the African Audiovisual and Cinema Commission (AACC) to promote the film and audiovisual industry in Africa. The French Development Agency (AFD) added CCIs to its list of intervention areas in 2019. In January 2020, the African Export-Import Bank (Afreximbank) announced the launch of a US$500 million creative industry support fund, which includes a component focused on the film and audiovisual sector. Finally, 2021 has been declared as the International Year of Creative Economy for Sustainable Development by the United Nations General Assembly and Year of Arts, Culture and Heritage by the African Union.

Globally, CCIs are estimated to generate about US$2.25 trillion annually (3% of the global GDP) and to employ 30 million people worldwide. However, Africa and the Middle East represent only about 3% (US$58 billion) of this global trade. Considering the dynamism and global cultural influence of Africa’s creative sectors, this constitutes a major untapped opportunity for African countries seeking to diversify their economies. CCIs are also proven to be one of the most innovative and resilient sectors in times of crisis, employing a large number of young people and women in high-skilled jobs while also encouraging entrepreneurship. More specifically, the film and audiovisual industry accounts for US$5 billion in GDP in Africa, employing an estimated 5 million people. With further investment, FEPACI estimates the sector has the potential to create over 20 million jobs and generate US$20 billion in annual revenues.

This surge has also attracted cautious institutional interest with early commitments from the Creative Industry Financing Initiative (CIFI) for fashion, film, information technology and music by the Central Bank of Nigeria; Fashionomics, the fashion investment programme by the African Development Bank; the creative industry facility by Afreximbank; and the series of investment facilities for film, music, gaming and fashion by East Africa’s HEVA Fund to highlight but a few. These initiatives reflect increasing confidence in CCIs and provide information necessary for further commercial investment and positive action by governments.

DEFINITION OF THE TERM “FILM AND AUDIOVISUAL INDUSTRY”

While the distinction between the film and audiovisual sectors was quite clear when film used to be shot on celluloid and released in cinemas, and audiovisual content was intended for broadcast on linear television channels, this separation is no longer relevant. Technological advances and the rise of digital platforms have led to an increased blurring of the lines between all forms of video content, which now share similar modes of development, production and consumption.

Today, most creative industry professionals across Africa are active in several areas of film and audiovisual production, moving seamlessly between formats and genres as opportunities and funding become available. Accordingly, this report focuses on the production and distribution of all creative film and audiovisual content, such as feature or short films, documentaries, television series, new formats for online or mobile consumption and, to a lesser extent, advertising, corporate and music videos. The journalism sector and production of news-related content are excluded from the analysis.

The terms “film and audiovisual industry” and “film and audiovisual sectors” have been used interchangeably although in the pan-African context, they can refer to significantly different situations. Indeed, the continent presents a variety of creative ecosystems in which emerging film and audiovisual powerhouses such as Nigeria, South Africa, Morocco and Egypt sit side by side with countries that have only a handful of film professionals, while the majority of nations stand somewhere in the middle.
We are trying to do something structural as well as finding conjunctural solutions. We need to advance the status of the artist, the filmmaker and their rights, especially the access to decent social security coverage.

Chiraz Latiri, former Minister of Cultural Affairs (Tunisia)
Debate “Culture/cinema recovery plans facing the Covid-19 crisis, what’s next?”, Cannes 2020, africultures.com

THE IMPACT OF COVID-19

The research for this report was conducted between November 2020 and May 2021, as Africa and the world continued to grapple with the COVID-19 pandemic. Over this period, most cinemas remained closed and planned film productions continued to experience cancellations or delays. Nevertheless, successive national lockdowns led to a huge boost in the consumption of online content and the establishment of new practices and behaviours. At the time of writing, the full, lasting impact of the pandemic is still impossible to anticipate or quantify. Consequently, we decided to base the country mapping on 2019 data and to consider the COVID-19 pandemic as a major factor accelerating the pace of the global film and audiovisual sector’s ongoing digital revolution.

METHODOLOGY AND SOURCES

Another major challenge in the preparation of this report has been the lack of verified data about the film and audiovisual sectors in the majority of countries surveyed. In November 2020, UNESCO launched a consultation with African States via an online questionnaire, with the objective of gathering official quantitative data. However, 32 countries (59%) reported that they did not collect such data on this particular area of their economies.

The lack of quantifiable indicators is often a major barrier to both government intervention and private sector investment. As a result, this report relies on a number of multi-stakeholder engagement and research methods that would allow to paint the most accurate picture possible of each country’s film and audiovisual sector. The reader should note, however, that in many cases the numbers presented are estimates made by practitioners based on their direct field knowledge. These estimates have been indicated as such in the footnotes.

The methodology involved the following:

- Review of existing local and regional studies published by institutions such as UNESCO, the African Regional Intellectual Property Organization (ARIPO), Euromed Audiovisual, AFD, the South African National Film and Video Foundation (NFVF), the Department of Trade and Industry (DTI), the HEVA Fund, the British Council, the Goethe-Institut, the French Institute, etc.

- Desk research based on news, academic articles and other online resources

- Detailed online quantitative questionnaire shared with governments and stakeholders in 54 African States. Responses were received from 43 countries, including 36 official responses from governments. When official data was not available, stakeholders were encouraged to provide their best estimate

- One-to-one qualitative interviews with over 100 established local stakeholders;

- Peer review by African film and audiovisual experts.

NOTES

3. Digital Cinema Initiatives (DCI) refers to the organization representing the six major Hollywood studios.
Information and data by region

This summary has been conducted using data provided by public authorities and consultations with different stakeholders.
PROFILE
- No. 5 in terms of number of films produced annually and number of cinema screens on the continent
- Predominance of international co-productions with European countries for auteur films in particular
- No. 3 in number of private television channels on the continent
- Growing production of local film and television contents, despite lack of dynamism
- Distribution and exhibition networks (cinema, pay TV, video-on-demand) supported by international players such as Canal Olympia and Canal + Afrique, ShowMax, Multichoice, Star Times, etc.
- Treaties and co-production agreements with Western countries
- Insufficient vocational training offers

DIFFICULTIES
- Weak or non-existent government incentives in some countries
- Limited potential for co-production between countries in the same region and with countries in other regions in Africa
- More dynamic cooperation of some countries with Europe due to a strong dependence on European subsidies
- Significant loss of revenue due to piracy and intellectual property infringement
- Weakness of the cinematographic and digital infrastructures
- Persistence of the barter model for television broadcasting in some countries
- Low number of experienced producers

PERSPECTIVES
- Recent investments in cinema infrastructure and increase in number of cinema screens
- Willingness shown by some countries to consider the cultural and creative industries as a strategic sector of development
- Emergence of professional training initiatives
- Growth in video-on-demand services
**EASTERN AFRICA**

**PROFILE**

- No. 1 in number of private television channels on the continent
- No. 2 in terms of number of films produced annually on the continent, largely due to the momentum of low-budget production in Kenya (Riverwood) and Ethiopia
- Emergence of a low-budget film industry based on the Nollywood model in several countries
- 4th region in Africa in terms of number of cinema screens
- Growing local broadcast market for TV series, especially in Kenya, etc.
- Strong film infrastructure and prime locations for foreign location shooting, particularly in Kenya and Mauritius, and an increase in number of screens in Ethiopia
- Distribution and exhibition networks (cinema, television, video-on-demand) led by international players such as MultiChoice, StarTimes, Netflix, Amazon Prime, Showmax, Canal+Afrique and local players such as Viusasa
- Remarkable efforts to formalise and structure the sector in some countries
- Organized and structured professional networks
- Vocational training opportunities available, but insufficient

**DIFFICULTIES**

- Weak or non-existent governmental incentives in some countries
- Limited potential for co-production between countries in the same region and with countries in other regions in Africa
- Significant loss of revenue due to piracy and intellectual property infringement
- Weak film and digital infrastructure in some countries
- Persistence of the barter model for television broadcasting in some countries

**PERSPECTIVES**

- Access to a large pan-African and international English-speaking market
- Potential for implementing a strategic service-based development model
- Possibility of replicating the Nollywood model for some countries
- Growth in video-on-demand services with the presence of major players

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**Comoros**  
**Djibouti**  
**Eritrea**  
**Ethiopia**  
**Kenya**  
**Madagascar**  
**Mauritius**  
**Rwanda**  
**Seychelles**  
**Somalia**  
**South Sudan**  
**Sudan**  
**United Republic of Tanzania**  
**Uganda**

**Population:** 494 million  
**Average GDP per capita:** US$5,932.9  
**Median age:** 21.9 years  
**Urban population:** 36.4%  
**Mobile phone penetration rate:** 71.4%  
**Internet penetration rate:** 24.3%

**Film policy**  

<table>
<thead>
<tr>
<th>Proportion of Women in the film industry</th>
<th>Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-10%</td>
<td>50%</td>
</tr>
<tr>
<td>10-20%</td>
<td>17%</td>
</tr>
<tr>
<td>30-40%</td>
<td>8%</td>
</tr>
<tr>
<td>40-50%</td>
<td>25%</td>
</tr>
</tbody>
</table>

**1525 films** produced per year  
**249 cinema screens**

**376 private television channels**

**Public funding for film:** 14%  
**Intellectual property/ Copyright policy:** 86% yes  
**Limits to freedom of expression:** 93% yes

**Share of revenues lost to piracy:**
- 43% report above 75%
- 21.5% report from 50 to 75%
- 28.5% report from 25 to 50%
- 7% report under 25%

---

**Film policy**  

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- 28.5% report from 25 to 50%
- 7% report under 25%
**NORTHERN AFRICA**

**PROFILE**
- No. 3 in terms of number of films produced annually and number of cinema screens on the continent
- No. 5 in number of private television channels on the continent
- Dynamic production and consumption of local film and television contents
- Solid cinematographic infrastructure and location choices for foreign location shooting, particularly in Morocco, Egypt and Tunisia
- Distribution and exhibition networks (cinema, pay TV, video-on-demand) led by international players such as Mégarama, StarPlay, Netflix, ShowMax, Amazon Prime, etc. and national players such as MagMovie, Artify, Forja.tn, etc.
- Diversified professional training offers
- Organized and structured professional networks
- Treaties and co-production agreements with Western countries

**DIFFICULTIES**
- Variable government support and incentives
- Significant revenue losses due to piracy and intellectual property infringement
- Weak film and digital infrastructure in some countries
- More dynamic cooperation with Europe and the Middle East, but limited potential for co-production between countries of the same region and with those of other regions in Africa, except Morocco

**PERSPECTIVES**
- Egypt, the "Hollywood" of the Middle East
- Morocco as a global shooting location (Service model)
- Good training of directors (Auther model) and other professionals (Service model)
- Growth in video-on-demand services

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**Information and data by region**

**NORTHERN AFRICA**

**Population:** 238.5 million

**Average GDP per capita:** US$10,292.5

**Median age:** 27.4 years

**Urban population:** 63.9%

**Mobile phone penetration rate:** 110.7%

**Internet penetration rate:** 46.4%

**Film policy**

- 309 films produced per year
- 285 cinema screens
- 88 private television channels

**Proportion of Women in the film industry**
- 0-10%: 16.7% report
- 20-30%: 50% report
- 30-40%: 16.7% report
- 50% or more: 16.7% report

**Public funding for film:** 50%

**Intellectual property/Copyright policy:** 100% yes

**Limits to freedom of expression:** 100% yes

**Share of revenues lost to piracy:** 84% report above 50%
**PROFILE**

- No. 1 in number of cinema screens on the continent
- No. 4 in number of films produced annually and in number of private television channels on the continent
- Growing local broadcasting market for TV series, especially in South Africa, Angola, etc.
- Solid cinematographic infrastructure and location choices for foreign location shooting, especially in Namibia, South Africa, etc.
- Emergence of a low-budget film industry based on the Nollywood model in some countries
- Distribution and exhibition networks (cinema, pay TV, video-on-demand) driven by international players such as Ster-Kinekor, NuMetro, MultiChoice, Netflix, Amazon Prime, Showmax, etc.
- Dynamic video advertising market, especially in South Africa
- Remarkable efforts to formalize and structure the sector in some countries
- Organized and structured professional networks
- Vocational training opportunities available, though insufficient

**DIFFICULTIES**

- Weak or non-existent governmental incentives in some countries
- Limited potential for co-production between countries in the same region and with countries in other regions in Africa
- Significant loss of revenue due to piracy and intellectual property infringement
- Weak film and digital infrastructure with the exception of South Africa and Namibia
- Persistence of the barter model for television broadcasting in some countries

**PERSPECTIVES**

- Access to a large pan-African and international English-speaking market
- Potential for implementing a strategic service-based development model
- Possibility of replicating the Nollywood model for some countries
- Growth in video-on-demand services with the presence of major players
WESTERN AFRICA

PROFILE

- No. 1 in the number of films produced annually on the continent, largely due to low-budget productions from Nollywood and other countries
- Predominance of international co-productions with European countries for auteur films in particular
- No. 2 in the number of cinema screens and private television channels on the continent
- Growing local market for television series production and broadcasting, particularly in Nigeria, Côte d’Ivoire, Senegal, Burkina Faso, etc.
- Distribution and exhibition networks (cinema, pay TV, video-on-demand) supported by international players such as Silverbird Cinema, Iroko TV, Canal Olympia and Canal + Afrique, Multichoice, Star Times
- Insufficient vocational training
- Treaties and co-production agreements with Western countries

DIFFICULTIES

- Weak or non-existent governmental incentives in some countries
- Limited potential for co-production between countries in the same region and with countries in other regions in Africa
- More dynamic cooperation of some countries with Europe due to dependence on European subsidies
- Significant loss of revenue due to piracy and intellectual property infringement
- Weak film and digital infrastructure in some countries
- Persistence of the barter model for television broadcasting in some countries
- Low number of experienced producers

PERSPECTIVES

- Recent investments in cinema infrastructure and increase in the number of cinema screens
- Strengthening of national public financial support systems in certain countries (FONSIC, FOPICA) and by international institutions (OIF, ACP-EU, etc.)
- Historically, priority given to the talent development in some countries that are now rewarded (Auteur model)
- Galvanizing influence of FESPACO (Festival model)
- Emergence of new professional training institutions
- Growth of video-on-demand services

<table>
<thead>
<tr>
<th>Region</th>
<th>Population (millions)</th>
<th>Average GDP per capita (US$)</th>
<th>Median age (years)</th>
<th>Urban population (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benin</td>
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<td>Côte d'Ivoire</td>
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<td>Guinea-Bissau</td>
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<td>Sierra Leone</td>
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<td>Togo</td>
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<table>
<thead>
<tr>
<th>Film policy</th>
<th>Proportion of Women in the film industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>60%</td>
<td>50% report 0-10%</td>
</tr>
<tr>
<td></td>
<td>21.5% report 10-20%</td>
</tr>
<tr>
<td></td>
<td>21.5% report 30-40%</td>
</tr>
<tr>
<td></td>
<td>7% report 50% or more</td>
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</table>

<table>
<thead>
<tr>
<th>3,393 films produced per year</th>
<th>292 cinema screens</th>
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</thead>
<tbody>
<tr>
<td>331 private television channels</td>
<td>Share of revenues lost to piracy:</td>
</tr>
<tr>
<td>Public funding for film: 47%</td>
<td>21% report above 75%</td>
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<td>Intellectual property/ Copyright policy: 93% yes</td>
<td>14.5% report from 50 to 75%</td>
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<tr>
<td>Limits to freedom of expression: 73% yes</td>
<td>50% report from 25 to 50%</td>
</tr>
<tr>
<td></td>
<td>14.5% report under 25%</td>
</tr>
</tbody>
</table>

Information and data by region
## Acronyms

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AARC</td>
<td>Agence algérienne pour le rayonnement culturel</td>
</tr>
<tr>
<td>AACC</td>
<td>African Audiovisual and Cinema Commission</td>
</tr>
<tr>
<td>ACCT</td>
<td>Agency for Cultural and Technical Cooperation</td>
</tr>
<tr>
<td>ACG</td>
<td>Gabonese Filmmakers Association</td>
</tr>
<tr>
<td>ACP-UE</td>
<td>Africa, Caribbean, Pacific States-European Union</td>
</tr>
<tr>
<td>ADMI</td>
<td>Africa Digital Media Institute</td>
</tr>
<tr>
<td>AFCFTA</td>
<td>African Continental Free Trade Area</td>
</tr>
<tr>
<td>AfDB</td>
<td>African Development Bank</td>
</tr>
<tr>
<td>AFD</td>
<td>French Development Agency</td>
</tr>
<tr>
<td>AFDA</td>
<td>School of Motion Picture Medium and Live Performance</td>
</tr>
<tr>
<td>AFFC</td>
<td>African Federation of Film Critics</td>
</tr>
<tr>
<td>AFHP</td>
<td>African Film Heritage Project</td>
</tr>
<tr>
<td>AFRAM</td>
<td>Afro-American Films</td>
</tr>
<tr>
<td>ALN</td>
<td>National Liberation Army</td>
</tr>
<tr>
<td>AMAA</td>
<td>Africa Movie Academy Awards</td>
</tr>
<tr>
<td>ANC</td>
<td>African National Congress</td>
</tr>
<tr>
<td>APAC</td>
<td>Association des producteurs algériens du cinéma</td>
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<td>APPA</td>
<td>Association des professionnels privés de l’audiovisuel</td>
</tr>
<tr>
<td>ARAV</td>
<td>Autorité de régulation de l’audiovisuel</td>
</tr>
<tr>
<td>ARIPPO</td>
<td>African Regional Intellectual Property Organization</td>
</tr>
<tr>
<td>ARPA</td>
<td>Association of African Directors and Producers</td>
</tr>
<tr>
<td>ARTCI</td>
<td>Autorité de régulation des télécommunications/Tic de Côte d’Ivoire</td>
</tr>
<tr>
<td>ATCG</td>
<td>Africa Technology and Creative Group</td>
</tr>
<tr>
<td>ATRIA</td>
<td>Association de recherches et d’informations audiovisuelle</td>
</tr>
<tr>
<td>BAFTA</td>
<td>British Academy of Film and Television Arts</td>
</tr>
<tr>
<td>BEKE</td>
<td>Bantu Educational Kinema Experiment</td>
</tr>
<tr>
<td>BURIDA</td>
<td>Bureau ivoirien des droits d’auteurs</td>
</tr>
<tr>
<td>CAA</td>
<td>Creative Artists Agency</td>
</tr>
<tr>
<td>CAC</td>
<td>Algerian Cinematography Center</td>
</tr>
<tr>
<td>CCI</td>
<td>Cultural and creative industrie</td>
</tr>
<tr>
<td>CCM</td>
<td>Moroccan Film Centre</td>
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<tr>
<td>CENACI</td>
<td>Gabonese Cinema Center</td>
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<td>CFF</td>
<td>Carthage Film Festival</td>
</tr>
<tr>
<td>CFU</td>
<td>Colonial Film Unit</td>
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<tr>
<td>CIDC</td>
<td>Inter-African Cinema Distribution Consortium</td>
</tr>
<tr>
<td>CIFI</td>
<td>Creative Industry Financing Initiative</td>
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<tr>
<td>CINAFRIC</td>
<td>African Cinema Society</td>
</tr>
<tr>
<td>CIPROFILM</td>
<td>Inter-African Film Production Center</td>
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<tr>
<td>CMO</td>
<td>Collective Management Organization</td>
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<tr>
<td>CNA</td>
<td>Cinéma Numérique Ambulant</td>
</tr>
<tr>
<td>CNC</td>
<td>National Centre of Cinematography and the Moving Image</td>
</tr>
<tr>
<td>CNCA</td>
<td>Algerian National Film Center</td>
</tr>
<tr>
<td>CNPC</td>
<td>National Film Production Center</td>
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<tr>
<td>COMACICO</td>
<td>Compagnie africaine de cinéma commercial</td>
</tr>
<tr>
<td>COMIC CON</td>
<td>Comic Convention</td>
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<td>CTCA</td>
<td>Association nationale des techniciens du cinéma et de l’audiovisuel</td>
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<td>DCI</td>
<td>Digital Cinema Initiative</td>
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<td>DGSN</td>
<td>Direction générale de la sûreté nationale</td>
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<td>Democratic Republic of the Congo</td>
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<td>DSO</td>
<td>Digital switchover</td>
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<td>DTI</td>
<td>Department of Trade and Industry</td>
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<td>DTT</td>
<td>Digital Terrestrial Television</td>
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<td>ELCA</td>
<td>EbonyLife Creative Academy</td>
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<td>EPA-ISTC</td>
<td>École de production audiovisuelle</td>
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<td>ESAV</td>
<td>Ecole Supérieure des Arts Visuels</td>
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<td>ESCA</td>
<td>Ecole spécialisée cinéma et audiovisuel</td>
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<td>ESTCA</td>
<td>École supérieure de théâtre, de cinéma et de l’audiovisuel</td>
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<td>FEPACI</td>
<td>Pan-African Federation of Filmmakers</td>
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<td>FESPACO</td>
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<td>FAAA</td>
<td>Abidjan Animation Film Festival</td>
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<tr>
<td>FICAM</td>
<td>Festival International de Cinéma d’Animation de Meknès</td>
</tr>
<tr>
<td>FONSIC</td>
<td>Fonds de Soutien à l’Industrie Cinématographique</td>
</tr>
<tr>
<td>FOPICA</td>
<td>Fund for the Promotion of the Film and Audiovisual Industry</td>
</tr>
<tr>
<td>Acronym</td>
<td>Description</td>
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<tr>
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<tr>
<td>FPCA</td>
<td>Pan-African Film and Audiovisual Fund</td>
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<td>FRELIMO</td>
<td>Liberation Front of Mozambique</td>
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<td>FTA</td>
<td>Free-to-air</td>
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<td>GDP</td>
<td>Gross Domestic Product</td>
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<td>GFIC</td>
<td>Ghana Film Industry Corporation</td>
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<td>IATF</td>
<td>Intra-African Trade Fair</td>
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<td>IFTA</td>
<td>International Federation of Television Archives</td>
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<td>INAFEC</td>
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<td>INC</td>
<td>National Cinema Institute</td>
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<td>IPO</td>
<td>Independent Producers’ Organisation</td>
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<td>Higher Institute of Audiovisual and Film Professions</td>
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<td>Kenya Broadcasting Corporation</td>
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<td>LAFAAAC</td>
<td>L’Académie franco-anglophone des arts audiovisuels et du cinéma</td>
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<tr>
<td>LGBTQ</td>
<td>Lesbian, gay, bisexual, transgender and queer</td>
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<td>LSCII</td>
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<td>MIDEM</td>
<td>Marché international du disque et de l’édition musicale</td>
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<td>MIPCOM</td>
<td>Marché International des programmes de communication</td>
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<td>MIPTV</td>
<td>Marché International des Programmes de Télévision</td>
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<td>MOGPAAFIS</td>
<td>Pan African and Arab Film Symposium of Mogadishu</td>
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<td>MPEAA</td>
<td>Motion Picture Export Association of America</td>
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<td>MPLA</td>
<td>People’s Movement for the Liberation of Angola</td>
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<td>MultiChoice Talent Factory</td>
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<td>NAFTI</td>
<td>National Film and Television Institute</td>
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<td>National Broadcasting Commission</td>
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<td>NFVF</td>
<td>National Film and Video Foundation</td>
</tr>
<tr>
<td>NGO</td>
<td>Non-governmental organisation</td>
</tr>
<tr>
<td>NISA</td>
<td>Nuit Ivoirienne du septième art et de l’Audiovisuel</td>
</tr>
<tr>
<td>NTA</td>
<td>Nigeria Television Authority</td>
</tr>
<tr>
<td>OACPS</td>
<td>Organisation of African, Caribbean and Pacific States</td>
</tr>
<tr>
<td>OAU</td>
<td>Organization of African Unity</td>
</tr>
<tr>
<td>OCAM</td>
<td>Common African and Malagasy Organization</td>
</tr>
<tr>
<td>OCINAM</td>
<td>National Cinematographic Office of Mali</td>
</tr>
<tr>
<td>ONAC</td>
<td>National Film Office of Côte d’Ivoire</td>
</tr>
<tr>
<td>ONCIC</td>
<td>National Office for Cinema Trade and Industry</td>
</tr>
<tr>
<td>ORTF</td>
<td>Office of French Radio and Television</td>
</tr>
<tr>
<td>PAIGC</td>
<td>African Party for the Independence of Guinea and Cape Verde</td>
</tr>
<tr>
<td>PPP</td>
<td>Public-private partnerships</td>
</tr>
<tr>
<td>REDA</td>
<td>Network of African Exhibitors and Distributors</td>
</tr>
<tr>
<td>RTI</td>
<td>Radio Télévision Ivoirienne</td>
</tr>
<tr>
<td>SATPEC</td>
<td>Société anonyme tunisienne de production et d’expansion cinématographique</td>
</tr>
<tr>
<td>SCINFO MA</td>
<td>Film Service of the Ministry of Information of Mali</td>
</tr>
<tr>
<td>SECEMA</td>
<td>Société d’exploitation cinématographique africaine</td>
</tr>
<tr>
<td>SIC</td>
<td>Société Ivoirienne du Cinéma</td>
</tr>
<tr>
<td>SIDEC</td>
<td>Société d’importation, d’exploitation et de distribution cinématographique</td>
</tr>
<tr>
<td>SNC</td>
<td>Société Nationale de Cinéma</td>
</tr>
<tr>
<td>SONACIB</td>
<td>National Company of exploitation and cinematographic distribution of Burkina</td>
</tr>
<tr>
<td>SONAVOCI</td>
<td>National Voltaic Film Company</td>
</tr>
<tr>
<td>SOPACIA</td>
<td>Société de participation cinématographique africaine</td>
</tr>
<tr>
<td>SVOD</td>
<td>Subscription video-on-demand</td>
</tr>
<tr>
<td>SWIFT</td>
<td>Sisters Working in Film and Television</td>
</tr>
<tr>
<td>TIFF</td>
<td>Toronto International Film Festival</td>
</tr>
<tr>
<td>TVET</td>
<td>Technical and vocational education and training institutions</td>
</tr>
<tr>
<td>UAC</td>
<td>African Cinema Union</td>
</tr>
<tr>
<td>UNESCO</td>
<td>United Nations Educational Scientific and Cultural Organization</td>
</tr>
<tr>
<td>UNCTAD</td>
<td>United Nations Conference on Trade and Development</td>
</tr>
<tr>
<td>UNDP</td>
<td>United Nations Development Program</td>
</tr>
<tr>
<td>UGC</td>
<td>Union générale cinématographique</td>
</tr>
<tr>
<td>VOD</td>
<td>Video-on-demand</td>
</tr>
<tr>
<td>WAEMU</td>
<td>West African Economic and Monetary Union</td>
</tr>
<tr>
<td>WNTV</td>
<td>Western Nigerian Television</td>
</tr>
<tr>
<td>ZIFF</td>
<td>Zanzibar International Film Festival</td>
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</tbody>
</table>
Pan-African trends shaping the future of the continent’s film and audiovisual sector
A SLOW BUT ENCOURAGING FORMALIZATION OF THE SECTOR

The lack of enabling policies possibly constitutes the most crucial impediment to the development and growth of the continent’s film and audiovisual sector. Currently, the organizational structure for cultural policy administration appears, in most African countries, quite fragmented, which makes it difficult to design concerted short- and long-term policies and strategies. Many countries lack an empowered ministerial body devoted to culture and the creative economy. With regard to the film and audiovisual sector, 30 out of 54 African States (55%) currently have a national film policy, while only 24 (44.4%) have a film commission.

We can only develop our filmmaking if the political authorities come to grips with the problem. It should be recalled that the poor football teams do not make it to the finals.

—Mahamat-Saleh Haroun, filmmaker (Chad)

Interview by Olivier Barlet with Mahamat-Saleh Haroun for Africultures regarding A Screaming Man (Un homme qui crie), Cannes 2010.

Effective and reliable data collection is imperative for any type of assessment and policy formulation. Nevertheless, across the continent, a major challenge to government action is the lack of reliable statistics about the potential of the creative sector or the impact of existing policies, in particular with respect to job creation or GDP contribution. In the absence of hard data and in a context of economic hardship, South Africa’s sophisticated tax incentive system, which constitutes a model for the entire continent, finds itself currently under threat.

This has prompted professional filmmakers’ associations such as the Independent Producers’ Organisation (IPO) to launch their own data collection effort in a bid to prove the effectiveness of the measures already in place. Other countries, such as Kenya and Namibia, have recognized and anticipated this need and have launched studies and performance indicator reviews for their film sectors, to drive the design and monitoring of their future film policies.

There are, however, signs of increased formalization across the continent as governments grasp the potential of the creative industries to create jobs for young people and diversify their economies. Draft film policies are currently under consideration in Sudan, Zambia and Zimbabwe, for instance. In September 2020, UNESCO and the European Union partnered with the Government of Uganda to promote legislation and policy reform in support of film sector development.1 In April 2021, the Nigerian government, in collaboration with the African Development Bank, announced the upcoming launch of a US$500 million initiative to invest in the country’s technology and creative infrastructure and promote an enabling environment.2

In the meantime, government support for the industry remains low to nonexistent across the continent. Most practitioners operate as freelancers or small business owners with no or limited social protection, making them particularly vulnerable to economic shocks as evidenced during the COVID-19 crisis, which shut down productions and cinemas. Overall, co-production treaties, which currently exist in only 15 countries (27.7%), and public funding for the film and audiovisual sector are still rare across the continent. According to the research conducted in the framework of this report, only 19 countries out of 54 (35.2%) offer financial support to filmmakers, most often in the form of grants or subsidies. Other support mechanisms such as income tax relief, the cancellation of import duties on film equipment, preferential credit, financial guarantees, tax breaks for corporate sponsorship of film production, and even local content broadcast quotas, remain the exception rather than the norm.

We started from nothing, without any funding. You have to be driven by passion above all, rather than wanting to make money.

—Ladj Ly, filmmaker (Mali/FRANCE)

Masterclass by Ladj Ly in Dakar, 2019, africultures.com

THE DIGITAL REVOLUTION

In the last 15 years, the growth of digital technology, driven by the mobile revolution and by massive investments in the continent’s Internet infrastructure, has been one of the bright spots of Africa’s development. Today, there are 816 million mobile SIM connections in Sub-Saharan Africa (77% penetration rate)3 and 712 million in the Middle East and North Africa (116% penetration rate).4 In several African countries, the digital economy is becoming one of the main drivers of growth, accounting for more than 5% of GDP.5

In the film and audiovisual sector, the arrival of new, affordable and lightweight digital film equipment on the continent a couple of decades ago ushered in a new era of filmmaking. Young Africans were suddenly able to access production resources for audiovisual content. Digital film technology has progressed so much that it has now become possible to shoot a cinema-quality video on a smartphone. One example is South African director Jenna Bass’s High Fantasy (2018),6 which premiered at the Toronto International Film Festival (TIFF).
Mobile-enabled solutions have disrupted traditional value chains in other filmmaking-related sectors. E-learning platforms are closing the gap in formal training institutions to offer targeted programmes. For instance, French startup LAFAAAC has partnered with cinema school La Fémis and Nigerian television channel Wazobia to offer online scriptwriting training via a mobile application.\(^7\)

Launched as early as 2005, YouTube has become the main avenue for professional training for scores of budding filmmakers, and more specifically animators and special effects artists across Africa, many of whom are self-taught. The Google-owned video service is also a major tool for self-distribution, as illustrated by the proliferation of web series in local languages in countries such as Ethiopia, Kenya, Rwanda and Senegal. Some of these made-for-the-Internet productions, such as the pioneering *An African City* (2014) from Ghanaian-American creator Nicole Amarteifo\(^8\) and the recent Zimbabwean comedy-drama *Working Wives* (2020),\(^9\) have since found their way on more traditional television stations or video-on-demand (VOD) platforms. Other leading social media services are also setting the foundation for an upcoming explosion of local content by allowing a new generation of African creators to earn directly from their work. The #YouTubeBlack Voices Fund provides creators, including content producers from Kenya, Nigeria and South Africa, with financial and technical support; Facebook makes it possible for accounts with more than 10,000 followers to monetize their videos through ads and fan subscriptions; Instagram recently rolled out the data-light version of its application across Africa and is testing monetization on Instagram Live and IGTV; and TikTok just signed a licensing deal to allow African artists to earn residuals when their music is used on the platform.

We have gone from productions at four million naira to 60 million. Everything is changing very quickly. We have not yet found a business model, but we are on the right track. Netflix’s biggest contribution in the long-term will be to prove that films are profitable, that they offer real business opportunities.

*Adekunle « Nodash » Adejuyigbe*

The African VOD sector is also growing rapidly, with subscriptions poised to balloon from 3.9 million in 2020 to 13 million in 2025, according to Digital TV Research. The arrival of VOD leader Netflix in Africa in 2019 has marked a turning point for filmmakers on the continent, by making their content accessible to a global audience for the first time. So far, the American streaming giant has been active mostly in Nigeria and South Africa – countries in which it has acquired extensive catalogues and commissioned original series such as Queen Sono, Blood & Water or the upcoming Secret Lives of Baba Segui’s Wives, at budget levels well beyond local market rates. Films and series from Angola, Cameroon, Kenya, Mozambique, Zimbabwe and a few other countries have also been acquired, firmly establishing Netflix as the global platform with the largest catalogue of African content. Netflix now has about 2 million subscribers across the continent, while the South African Showmax has some 688,000 direct subscribers. In North Africa (and the Middle East), StarzPlay is another strong contender, with 1.8 million subscribers across the Arab States region.

In some markets, local digital platforms are also thriving. In Côte d’Ivoire, VOD services have developed spectacularly recently thanks to the deployment of more than 5,000 kilometers of optical fibre on the territory. Most local operators such as RTI and mobile operators Orange, MTN and Moov Africa have also launched their VOD services. A very large majority of the 600,000 monthly downloads currently made on Orange TV are for Ivorian content. This success justifies Orange’s growing involvement in the financing of Ivorian productions.

Although mass digitalization of the economy has been an ongoing global process for the past 20 years, its pace dramatically accelerated during the COVID-19 pandemic, which forced many to turn to their devices to learn, create and consume from home. Africa was no exception to this global trend.

<table>
<thead>
<tr>
<th>Table 1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Africa’s leading VOD operators</strong></td>
</tr>
<tr>
<td><strong>Company</strong></td>
</tr>
<tr>
<td>Netflix</td>
</tr>
<tr>
<td>ShowMax</td>
</tr>
<tr>
<td>IrokoTV</td>
</tr>
<tr>
<td>Amazon</td>
</tr>
</tbody>
</table>


However, the continent remains the world’s least connected region, with about 28.2% of Internet users. Few governments are investing strategically in developing digital infrastructure, services, skills and entrepreneurship. There is also a need to adapt and harmonize legislation on technology, including intellectual property and data privacy, to truly unleash Africa’s digital potential.

<table>
<thead>
<tr>
<th>Table 2</th>
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<tbody>
<tr>
<td><strong>Number of cinema screens</strong></td>
</tr>
<tr>
<td><strong>Zone</strong></td>
</tr>
<tr>
<td>United States (2020)</td>
</tr>
<tr>
<td>China (2020)</td>
</tr>
<tr>
<td>India (2019)</td>
</tr>
<tr>
<td>France (2019)</td>
</tr>
<tr>
<td>Africa (2019)</td>
</tr>
</tbody>
</table>

CINEMAS: ADAPT OR DIE

With a total of about 1,653 screens across the continent, representing one screen per 787,402 people, Africa is by far the most underserved continent with regard to cinema distribution. As a comparison, in 2020, the United States had a total of 44,111 screens, namely one per 7,503 people; China had 75,581 screens, amounting to one per 19,043 people (an almost 20-fold increase since 2007); India had 6,327 screens in 2019, representing one screen per 215,900 people; and France had 6,114 screens, namely one per 10,958 people.

Before the pandemic, the cinema exhibition sector in mature markets was already being challenged by the fast roll-out of international streaming platforms and changes in customer behaviour. Pandemic-related national lockdowns accelerated this trend, leading to the mass closure of major cinema chains in Europe and the United States. The situation is different in emerging markets such as China, India or Russia, where large infrastructure investments have led to massive growth in the past few years.
In fact, China is now the largest movie theatre market in the world, before the United States. Although these countries were also impacted by cinema closures in 2020, early 2021 box office numbers hint at a full recovery. February 2021 even marked China’s biggest month ever for film ticket sales. 20

The situation in Africa is more complex. First of all, the continent has few cinema chains with a regional footprint, which means that most cinemas are run independently and therefore even more vulnerable to business challenges and economic shocks. The most prominent chains operate in English-speaking Africa: Ster-Kinekor, with 55 complexes (400 screens) in South Africa and 6 in neighbouring countries; NuMetro, with 25 locations (149 screens) in South Africa and a few others in Kenya, Mozambique and Zambia; Filmhouse, with 13 locations (58 screens), Genesis Cinemas with 10 locations (43 screens) and Silverbird Cinemas with 6 locations (37 screens), all three in Nigeria. In the past five years, however, the Francophone West African cinema market has experienced dynamic growth, with French companies Les Cinémas Pathé-Gaumont and Vivendi’s CanalOlympia ramping up their investment in the sector. These two companies now own the majority of the region’s 62 screens. Before the pandemic, there were plans for this number to triple by 2024. 21 Both companies have gone even further afield: Vivendi has opened a total of 18 CanalOlympia venues in 12 countries across the continent, including in Rwanda and Nigeria, 22 while Les Cinémas Pathé-Gaumont also operates two multiplexes in Tunisia and two in Morocco. 23 It is important to note that, with the exception of the Nigerian exhibitors, these cinema chains predominantly screen Hollywood blockbusters.

“Showing films is easy, but distributing them is another matter; it is really difficult. For me, the main issue is the lack of distribution of African cinema. You can go to film festivals, get an award or receive all kinds of recognition, but you leave without a sales contract.”

Hailé Gerima, filmmaker (Ethiopia)
Interview by Hassouna Mansouri with Haile Gerima regarding Teza for Africultures, Carthage Film Festival, Tunis, 2008.

Across the continent, the staggering gap in cinema infrastructure is not the only challenge to the development of cinema distribution. Commercial cinema exhibitors have long struggled to find a viable business model due to the absence of a cinema-going culture in many countries, crippling piracy, an insufficient or unreliable supply of high quality local films, and local audiences’ limited disposable income. In parallel, throughout the continent a plethora of small, commercial and non-profit independent initiatives have taken up the mission to develop or revive local cinema cultures, build new audiences and bring local films closer to the public through the management of mobile or community cinemas. These organizations, which include the pan-African Cinema Spaces Network, 24 Sunshine Cinema in Southern Africa, 25 the Cinéma Numérique Ambulant (CNA) and MobiCiné in Francophone West Africa, 26 are tackling an enormous task with limited funding and resources.
The Nigerian industry has been able to achieve profitability at the national level, even before being exported worldwide. The rest of the continent has not achieved these kinds of figures, which means that we have to organize our industries differently. But the Nollywood model will not be suitable for every African country.

Tsitsi Dangarembga (Zimbabwe)
Debate “What economic viability for African cinema? (Quelle viabilité économique pour les cinémas d’Afrique ?),” Cannes 2020, africultures.com

Overall, this study shows that most countries reported a decline in traditional cinema attendance even before pandemic-related closures. There are, however, notable exceptions. In 2019, Les Cinémas Pathé-Gaumont and CanalOlympia reported encouraging results, even though their cinemas were not all profitable yet,27 while South Africa (663 screens, i.e. 1 screen per 88,325 people), Ethiopia (127 screens, i.e. 1 per 882,677 people) and Egypt (some 80 screens, i.e. 1 screen per 1.25 million people) have existing cinema networks that may retain potential for further growth. Ethiopia also reported strong growth in cinema attendance, driven by local film releases.

Most impressively, Nigeria emerges as a clear outlier. After an initial “golden age” in the 1960s and 1970s spurred by the Nigerian Enterprises Promotion Decree (“Indigenization Decree”) and the oil boom, the country’s cinema culture experienced a drastic decline in the 1980s, leading by the end of the next decade to the collapse of Nigeria’s entire movie theatres network. Since the early 2000s, however, and thanks to the efforts of local companies such as Silverbird Cinemas, Filmhouse and Genesis Cinemas, the Nigerian cinema market has been experiencing a true revival. In the past five years in particular, the West African nation has seen a 200% increase in cinema locations from 25 in 2015 to 77 in 2020, with the total number of DCI-compliant screens reaching 237 in 2020 – the equivalent of one screen per 843,881 people. Although the number of cinemas in Nigeria is still largely insufficient compared to the country’s size and population, the dynamic growth of the sector is an indication of the health of the local film industry. In fact, the share of Nollywood versus Hollywood films has been growing steadily at the local box office. While 80% of cinema revenue in Nigeria was generated by Hollywood titles in 2015, that number had dropped to 74% by 2019. With the cancellation or postponement of most Hollywood releases in 2020, Nollywood films stepped up to fill the void, leading to a reversal of the balance of power, with Nollywood productions generating 56% of the box office revenue that year.28

Table 3
Africa’s largest cinema markets

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of screens</th>
<th>Population coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>South Africa</td>
<td>663</td>
<td>1 screen per 88,325 people</td>
</tr>
<tr>
<td>Nigeria</td>
<td>237</td>
<td>1 screen per 843,881 people</td>
</tr>
<tr>
<td>Éthiopie</td>
<td>127</td>
<td>1 screen per 882,677 people</td>
</tr>
<tr>
<td>Egypt</td>
<td>80</td>
<td>1 screen per 1.25 million people</td>
</tr>
<tr>
<td>Morocco</td>
<td>77</td>
<td>1 screen per 473,636 people</td>
</tr>
</tbody>
</table>

In Africa and elsewhere, one way for cinemas to survive the growing competition with at-home viewing will be to lean into their appeal as a social, live entertainment experience. Nigerian cinemas owe a lot of their success to their skill at turning every new film release into an event, with celebrity-filled red carpets and themed dress codes. Vivendi seems to have chosen a similar strategy with its CanalOlympia multi-purpose concept, which combines a cinema screen with an outdoor concert space and is poised to ultimately expand to include food courts and other entertainment options such as escape games.

THE COMPLEX LIBERALIZATION OF THE AUDIOVISUAL SECTOR

Driven by economics, technology and a socio-political context of increased pluralism and democracy after the end of the Cold War, the early 1990s marked the beginning of the liberalization of the media sector across Africa. Foreign aid also played a key role, as Western governments and NGOs began to support the development of African media along Western lines.29 As a result, the African television broadcast sector experienced a major boom in the past 30 years, growing from only 10 commercial operators in 1985 to close to 1,000 private television channels today.

Table 4
Number of private television channels around the world

<table>
<thead>
<tr>
<th>Zone</th>
<th>Number of TV channels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>11,000 (2019)*</td>
</tr>
<tr>
<td>United States</td>
<td>7,890 (2017)**</td>
</tr>
<tr>
<td>China</td>
<td>3,000 (2017)***</td>
</tr>
<tr>
<td>Africa</td>
<td>1,000 (2021)</td>
</tr>
<tr>
<td>India</td>
<td>902 (2019)***</td>
</tr>
</tbody>
</table>

Sources:
*** Wikipedia, Television in China.
**** Wikipedia, Lists of television channels in India.

In 2006, the International Telecommunication Union (ITU), a United Nations agency, issued the GE06 Regional Agreement, signalling the development of “alldigital” terrestrial television services. Most countries in the world agreed to set 17 June 2015 as the mandated analogue switch-off date, at which time the transition from older analogue television broadcasting technology to digital television was to be completed in each nation. That deadline, however, proved difficult to meet in several regions including Africa, mostly due to high upgrade costs.
The current situation imposes an ever-growing duty of resistance, as the flood of satellite images makes it more important than ever to produce endogenous images that meet the African peoples’ vital need to see their own reflection, their own image.

Gaston Kaboré, filmmaker (Burkina Faso)
The UNESCO Courier - July-August 1995

To date, only 18 African countries have completed their digital switchover (DSO). Despite long delays, this digital transition process is actively ongoing. In practical terms, the move to digital broadcast technology allows for better picture quality, but also creates efficiency gains that liberate broadband spectrum, which can then be used to launch new television channels or expand Internet access. Across the continent, the digital terrestrial television (DTT) roll-out has been an area of strong interest for global pay television operators such as StarTimes, Multichoice and Canal+. The arrival of DTT in Côte d’Ivoire in 2017 also led to intense competition over the five new free-to-air (FTA) licences made available by the government. Canal+ and RTI were each awarded one, while French broadcaster M6 acquired a 12.5% share in the new general entertainment channel Life TV.

Even in countries where the DSO process has not yet been completed, Africa’s last remaining closed-off broadcast markets are being liberalized. Between 2016 and 2017, a wave of private stations entered the Ethiopian market, including Kana TV, which quickly became the country’s most popular channel by introducing foreign soap operas dubbed in Amharic for the first time. Today Ethiopia has 45 private stations. In Zimbabwe, after 60 years of broadcasting monopoly, six new players were awarded commercial television licences in November 2020. A few months later, the Broadcasting Authority of Zimbabwe announced plans to issue more television and radio licences to independent stations.

The increase in the number of private television stations across the continent was initially presented by many operators and investors as an opportunity to stimulate the local creative content industries. Indeed, the assumption was that more local content would be needed to fill the schedules of the new channels being launched. However, the reality on the ground has been very different. In fact, the initial assumption revealed to be deeply flawed, failing to take into account the fact that in most African countries the pool of television advertisers remains very small. With more channels competing over the same advertising budgets of a limited number of brands, broadcasters are struggling to stay afloat and the expected boost in local content production has not materialized. In some countries, such as Kenya, budgets for local television productions have even decreased in the past five years. Another major hurdle is the lack of modern, reliable audience measurement systems across the continent, which robs broadcasters and creators from data they could use to negotiate better rates from advertisers. The transition to DTT and the related adoption of setup boxes with tracking systems are expected to eventually address this issue.
As local FTA broadcasters continue to grapple with unsuccessful business models, many still rely on the barter system to secure local content for their channels. This means that they expect local producers to make their content available for free or even to purchase their airtime against a share of advertising revenue. The barter system is a remnant of the first wave of liberalization of the African media space, during which the emphasis was on increased access to news and information rather than the promotion of local creative content. The persistence of this model, however, including in large markets such as Nigeria, has been a major impediment to the development of the audiovisual sector in many countries. In this context, commissions from pay television operators Multichoice, Canal+ and StarTimes are often the only way for local producers to get paid for creative work. It is worth noting that of the three pan-African pay television providers, only the South African Multichoice hails from the continent. The entry of Canal+ in the original content space in Africa has brought about key progress through the French operator’s use of contractual terms that are much more favorable to local producers, who retain rights to their creations and to exploit their content in non-French-language markets. Multichoice, which dominates most English-language markets, still insists on securing exclusive, worldwide, lifelong rights to the content it commissions. Meanwhile, StarTimes has focused on a local community strategy, producing or dubbing content in several vernacular languages including Swahili, Hausa, Yoruba and Luganda. In 2019, the company announced a US$1.93 million investment into Rembo TV, a new Kenyan entertainment channel.

Finally, most broadcast ecosystems across the continent also suffer from overly complex, overzealous and often contradictory regulations. Some measures aimed at protecting domestic markets from competition with global players such as Multichoice, Canal+ and Netflix, can end up having the opposite effect through poor design. For instance, the recent amendment by the Nigerian National Broadcasting Commission (NBC) to the Nigeria Broadcasting Code, which proposes the removal of all exclusivity arrangements, is hotly contested by local practitioners.

Table 5
Africa’s leading pay television operators

<table>
<thead>
<tr>
<th>Company</th>
<th>Ownership</th>
<th>Regions of operation</th>
<th>Number of subscribers</th>
<th>Notable local content</th>
<th>Local content channels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multichoice*</td>
<td>South Africa</td>
<td>English-speaking Africa, Portuguese-speaking Africa</td>
<td>20.1 M</td>
<td>59,000 hours of local content library, including popular soap operas like <em>Isoso</em>, <em>Legacy</em>, <em>Tinsel</em>, <em>Hotel Majestic</em>, <em>Selina</em>, <em>Mpali</em>, <em>Jacob’s Cross</em>...</td>
<td>28 local channels including KykNET, Africa Magic, Mzansi Magic, Maisha Magic, Pearl Magic, Zambezi Magic...</td>
</tr>
<tr>
<td>StarTimes**</td>
<td>China</td>
<td>English-speaking Africa, Portuguese-speaking Africa, Francophone Africa</td>
<td>8.4 M</td>
<td>N/A</td>
<td>Several vernacular channels including ST Dadin Kowa, ST Adepa, ST Nollywood Plus, ST Swahili, Rembo TV</td>
</tr>
<tr>
<td>Canal+ Afrique***</td>
<td>France</td>
<td>Francophone Africa, Ethiopia</td>
<td>6 M</td>
<td>4,000 hours of local content library, including <em>Invisibles</em>, <em>Cacao</em>, <em>Sakho et Mangane</em>, <em>Hantés</em>, <em>Koiffure Kitoko</em>...</td>
<td>32 local channels including A+, A+ Ivoire, VOIR+ and 9 Amharic language channels</td>
</tr>
</tbody>
</table>


Perhaps the most encouraging trend of the last decade has been the slow but steady rise in the volume of production across the continent. Although specific numbers are, once again, difficult to obtain, practitioners in 31 countries (including 19 in English-speaking Africa) out of 54 have noted a recent increase in the number of films and television series being produced. A few factors explain this phenomenon: the digital revolution, which is making audiovisual content cheaper to produce and easier to distribute; increased investment from global players such as Multichoice, Canal+ and Netflix; the coming of age of a new, better trained generation of filmmakers; and the massive, inspirational success of Nollywood.

Many stakeholders point directly to the example of – and competition from – Nollywood as a key driver for the development of their own country’s local film and video industry.
By adopting and adapting Nollywood’s commercial, low-cost production model focused on authentic storylines, filmmakers across the continent have created a number of dynamic local, vernacular ecosystems with their own economies, distribution networks and star systems. Riverwood (Kenya), Bongo films (Tanzania), Wakaliwood (Uganda), Ghallywood (Ghana) and Lollywood (Liberia), among others, can each produce up to several hundred films per year. In this context, the term “film” refers to films lasting typically between 80 and 180 minutes, and not exclusively films intended for distribution in cinemas. Due to the overall weakness of African cinema networks and the uneven quality of many of these productions, these films were initially released on DVD or VCD and sold in the streets at a very affordable price. However, the growth of Internet usage has led to the near collapse of the DVD distribution model across the continent, although the sale of (mostly pirated) DVDs persists to some extent in rural areas. Today, these films are increasingly made directly for online distribution, especially on YouTube. The best films can also hope to sell to a television station and, in rare cases, some of them earn the privilege of being formally released in cinemas.

Even though these local offshoots do not have the potential to rival Nollywood, due to the sheer size of the Nigerian population and its appetite for local content, they do aspire to reproduce some of its success. Today the Nigerian film industry employs over a million people directly or indirectly, dwarfing other African film sectors. Nollywood produced 2,599 films in 2020 according to the National Bureau of Statistics, making it the world’s second largest film industry in terms of output after Bollywood and before Hollywood. Out of this number, only about 200 films are released in cinemas every year as the majority of films are not formatted for this medium, but also because of the lack of space in cinemas. Without denying its humble beginnings as a low-cost video- and VCD-based industry, in the past 10 years Nollywood has grown tremendously in terms of both commercial revenue and production value. A milestone was reached in 2016, when the ELFIKE Film Collective (comprising EbonyLife Films, FilmOne Entertainment, Inkblot Productions and Koga Studios) produced The Wedding Party, which became the biggest film performance in Nigerian cinemas at the time, grossing US$1.5 million.40

Graph 1

Top African producing countries in volume
Estimated number of local films produced per year

<table>
<thead>
<tr>
<th>Country</th>
<th>Films Produced</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nigeria</td>
<td>2,599*</td>
</tr>
<tr>
<td>Ghana</td>
<td>600</td>
</tr>
<tr>
<td>Kenya</td>
<td>500</td>
</tr>
<tr>
<td>Tanzania</td>
<td>500</td>
</tr>
<tr>
<td>Uganda</td>
<td>200</td>
</tr>
<tr>
<td>Tunisia</td>
<td>185</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>140</td>
</tr>
<tr>
<td>Zambia</td>
<td>105</td>
</tr>
<tr>
<td>Liberia</td>
<td>100</td>
</tr>
<tr>
<td>Egypt</td>
<td>60</td>
</tr>
</tbody>
</table>

Note: These figures were reported by practitioners and include films on DVD and in VOD.
Since then, other local films have achieved similar feats, even going head-to-head with Hollywood at the box office. In December 2020, just as cinemas finally reopened after months of lockdown due to the pandemic, Omo Ghetto: The Saga became the latest highest-grossing Nigerian film of all time (in the local Naira currency, if not in dollars), earning over US$1.3 million. Nollywood films have encountered similar success on Netflix, including Kenneth Gyang’s Òlòturé (2020), ranked among the top ten most-watched films in 25 countries upon its release on the platform. 42

However, Nigeria is not the only success story. Another highlight is the growth in television series production across the continent, spurred by new investments in local content from Multichoice, Canal+, TV5 Monde and Netflix, but also by some local FTA players such as RTI in Côte d’Ivoire. In some countries, such as Zambia, Multichoice has been responsible for the creation and survival of an entire sector, employing some 200 technicians and professionals at the same time on various productions for its regional channel Zambezi Magic. In Francophone West Africa, RTI has financed and produced – and distributed internationally – a long list of popular series starting with Ma famille (2002), followed by other titles such as Nafi, Histoire d’une vie, Class’A, Sah Sandra, Dr Boris, Teenager and Sicobois. The recent involvement of Canal+ in content production has led to the release of series with high production values such as Invisibles and Cacao from Ivorian director Alex Ogou, and Sakho & Mangane, shot in Dakar by director Jean-Luc Herbulot. Since the groundbreaking release of the highly popular soap opera Maîtresse d’un homme marié (Mistress of a Married Man) in 2019, Senegal has also been experiencing a television series boom. The first two seasons of the soap opera were initially aired on the private Senegalese channel 25TV and later accumulated between 2 million and 5 million views per episode on YouTube. While Multichoice, Canal+ and Netflix can afford to spend between a few dozen and a few hundred thousand dollars per episode (for Netflix), local broadcasters are limited to average production budgets between US$2,600 and US$3,500 per episode. 43

A Malian film does not move me any more than a Japanese film. There is something that speaks to me as a human being in different cultures. That is the beauty of cinema. That is also where the importance of local and regional cinema lies, because that is where the rare films that traverse humanity emerge, directly in touch with each person in their daily lives. As a mirror of their society, these films have a real effect.

Alain Gomis, filmmaker (Senegal)
Interview by Olivier Barlet with Alain Gomis, Tunis, Le Soleil 2 and 3 November 2019

In the past few years, African auteur cinema has also been increasingly present and recognized on the international scene. In 2014, Mauritania-born Malian director Abderrahmane Sissako’s Timbuktu was a global success, nominated for several prestigious awards including the Academy Awards (Oscars) and the British Academy of Film and Television Arts (BAFTA) Awards. Other notable prize winners include I Am Not a Witch (2017) by Zambian-Welsh director Rungano Nyoni, winner of a BAFTA Award for Outstanding Debut by a British Writer, Director or Producer; Franco-Senegalese directors Alain Gomis, with Félicité (2017) – winner at the Pan-African Film and Television Festival of Ouagadougou (FESPACO) and the Berlin International Film Festival (Berlinale) – and Mati Diop, with Atlantics (2018), winner of the Grand Prix at the Festival de Cannes; Rafiki (2018) by Kenyan director Wanuri Kahiu, which was also screened at the Festival de Cannes and for which she won a Best Actress award at FESPACO; and Night of the Kings (2020) by Franco-Ivorian filmmaker Philippe Lacôte, winner of the Amplify Voices Award at TIFF. Meanwhile, The Man Who Sold His Skin (2021) by Kaouther Ben Hania became the first Tunisian film to be nominated for an Oscar. However, it is important to note that most of these directors are not based in their country of origin but in Europe. Thus, African auteur cinema does largely overlap with cinema from the African diaspora. African documentary filmmakers are also attracting attention, such as Congolese director Dieudo Hamadi for Downstream to Kinshasa (2020 Festival de Cannes official selection), Kenyan director Sam Soko for Softie (2020 Special Jury Award at the Sundance Film Festival) and Sudanese director Suhaib Gasmelbari for Talking About Trees (2019 Berlinale Award winner). In 2021, the South African documentary My Octopus Teacher became the fifth African film ever to win an Oscar. 44

I try to look at the selection of Atlantics (Atlantique) at the Cannes competition as if it was happening to somebody else, such as the prize for Alain Gomis’s “Félicité” at Berlin: I realized how important it was for Senegal, and the dynamism it gave to the country and to young film-makers.

Mati Diop, filmmaker (Senegal)
Interview by Olivier Barlet with Mati Diop, Le Soleil, 20 May 2019.

The dynamism of Africa’s film and audiovisual output is not going unnoticed by Hollywood. Directors Philippe Lacôte, Mati Diop, Wanuri Kahiu and C.J. Obasi from Nigeria have all been signed by leading talent agency Creative Artists Agency (CAA) and are now all working on major international projects.
### Table 6

**Major African prize-winning films of the past 10 years (2011-2021)**

<table>
<thead>
<tr>
<th>Year</th>
<th>Producing country</th>
<th>Film</th>
<th>Director</th>
<th>Festival</th>
<th>Award</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>Morocco</td>
<td>Pegasus</td>
<td>Mohamed Mouftakir</td>
<td>FESPACO</td>
<td>Étalon d’Or de Yennenga</td>
</tr>
<tr>
<td>2012</td>
<td>Senegal</td>
<td>The Pirogue</td>
<td>Moussa Touré</td>
<td>Carthage Film Festival</td>
<td>Golden Tanit</td>
</tr>
<tr>
<td>2013</td>
<td>Senegal, France</td>
<td>Tey (Today)</td>
<td>Alain Gomis</td>
<td>FESPACO</td>
<td>Étalon d’Or de Yennenga</td>
</tr>
<tr>
<td>2013</td>
<td>Egypt, United Kingdom, United States</td>
<td>The Square (Al-Midan)</td>
<td>Jehane Noujaim</td>
<td>TIFF</td>
<td>People’s Choice Documentary Award</td>
</tr>
<tr>
<td>2013</td>
<td>Egypt, United Kingdom, United States</td>
<td>The Square (Al-Midan)</td>
<td>Jehane Noujaim</td>
<td>Sundance Film Festival</td>
<td>Best Feature Film, Best Director, Best Original Screenplay, Best Cinematography, Best Sound, Best Film Editing, Best Original Score</td>
</tr>
<tr>
<td>2014</td>
<td>Mauritania, France</td>
<td>Timbuktu</td>
<td>Abderrahmane Sissako</td>
<td>César</td>
<td>Étalon d’Or de Yennenga</td>
</tr>
<tr>
<td>2014</td>
<td>Ethiopia</td>
<td>Difret</td>
<td>Zeresenay Berhane Mehari</td>
<td>Sundance Film Festival</td>
<td>Audience Award: World Cinema Documentary</td>
</tr>
<tr>
<td>2015</td>
<td>Morocco, France</td>
<td>Fevers</td>
<td>Hicham Ayouch</td>
<td>FESPACO</td>
<td>Étalon d’Or de Yennenga</td>
</tr>
<tr>
<td>2015</td>
<td>Morocco, France</td>
<td>The Blind Orchestra</td>
<td>Mohamed Mouftakir</td>
<td>Carthage Film Festival</td>
<td>Golden Tanit</td>
</tr>
<tr>
<td>2016</td>
<td>Tunisia, Belgium, France</td>
<td>Inhebbek Hedi</td>
<td>Mohamed Ben Attia</td>
<td>Berlinale</td>
<td>Best First Feature Award, Silver Bear for Best Actor</td>
</tr>
<tr>
<td>2016</td>
<td>Tunisia, France</td>
<td>Zaineb Hates the Snow</td>
<td>Kaouther Ben Hania</td>
<td>Carthage Film Festival</td>
<td>Golden Tanit</td>
</tr>
<tr>
<td>2017</td>
<td>Senegal, France, Belgium, Germany, Lebanon</td>
<td>Félicité</td>
<td>Alain Gomis</td>
<td>FESPACO</td>
<td>Étalon d’Or de Yennenga</td>
</tr>
<tr>
<td>2017</td>
<td>Senegal, France, Belgium, Germany, Lebanon</td>
<td>Félicité</td>
<td>Alain Gomis</td>
<td>Berlinale</td>
<td>Silver Bear Grand Jury Prize</td>
</tr>
<tr>
<td>2017</td>
<td>Mozambique, South Africa, Brazil, France, Portugal</td>
<td>The Train of Salt and Sugar</td>
<td>Licínio Azevedo</td>
<td>Carthage Film Festival</td>
<td>Golden Tanit</td>
</tr>
<tr>
<td>2017</td>
<td>South Africa, France, Netherlands, Finland</td>
<td>Winnie</td>
<td>Pascale Lamche</td>
<td>Sundance Film Festival</td>
<td>Directing Award: World Cinema Documentary</td>
</tr>
<tr>
<td>2018</td>
<td>Tunisia</td>
<td>Fatwa</td>
<td>Mahmoud Ben Mahmoud</td>
<td>Carthage Film Festival</td>
<td>Golden Tanit</td>
</tr>
<tr>
<td>2019</td>
<td>Rwanda, Belgium, France</td>
<td>The Mercy of the Jungle</td>
<td>Joël Karekezi</td>
<td>FESPACO</td>
<td>Étalon d’Or de Yennenga</td>
</tr>
<tr>
<td>2019</td>
<td>Tunisia, Belgium France</td>
<td>Noura’s Dream</td>
<td>Hinde Boujemaa</td>
<td>Carthage Film Festival</td>
<td>Golden Tanit</td>
</tr>
<tr>
<td>2019</td>
<td>Senegal, France, Belgium</td>
<td>Atlantics</td>
<td>Mati Diop</td>
<td>Festival de Cannes</td>
<td>Grand Prix</td>
</tr>
<tr>
<td>2020</td>
<td>Algeria, France, Belgium, Qatar</td>
<td>Papicha</td>
<td>Mounia Meddour</td>
<td>César</td>
<td>Best First Feature Film, Best Female Newcomer</td>
</tr>
<tr>
<td>2020</td>
<td>Côte d’Ivoire, Senegal, France, Canada</td>
<td>Night of the Kings</td>
<td>Philippe Lacôte</td>
<td>TIFF</td>
<td>Amplify Voices Award</td>
</tr>
<tr>
<td>2020</td>
<td>Dem. Rep. of the Congo, Congo, France, Belgium</td>
<td>Downstream to Kinshasa</td>
<td>Dieudonné Hamadi</td>
<td>TIFF</td>
<td>Amplify Voices Award, Honorable Mention</td>
</tr>
<tr>
<td>2020</td>
<td>Kenya</td>
<td>Softie</td>
<td>Sam Soko</td>
<td>Sundance Film Festival</td>
<td>World Cinema Documentary Special Jury Award for Editing</td>
</tr>
<tr>
<td>2020</td>
<td>Lesotho, South Africa, Italy, United States</td>
<td>This Is Not a Burial, It’s a Resurrection</td>
<td>Lemohang Jeremiah Mosese</td>
<td>Sundance Film Festival</td>
<td>World Cinema Dramatic Special Jury Award for Visionary Filmmaking</td>
</tr>
<tr>
<td>2021</td>
<td>South Africa</td>
<td>My Octopus Teacher</td>
<td>Pippa Ehrlich and James Reed</td>
<td>Oscar</td>
<td>Best Documentary Feature</td>
</tr>
</tbody>
</table>
The success of many diaspora actors with strong links to the continent, including British-Nigerian David Oyelowo (Selma), John Boyega (Star Wars) and Chiwetel Ejiofor (Doctor Strange), Franco-Senegalese Omar Sy (Lupin), British-Ugandan Daniel Kaluuya (Get Out) and Kenyan actress Lupita Nyong’o (Star Wars) also contributes in its own way to the global influence of African cinema.

It is crucial to mention that these successes have for the most part taken place with little or no support from African governments, which remain, as mentioned above, largely unaware of the potential of their own local talent. In the absence of more domestic support, the risk is for up-and-coming African creative industry professionals to follow the example set by some African athletes and migrate to Hollywood or Europe in search of more recognition and better working conditions.

**THE EDUCATION CHALLENGE**

Despite the clearly blossoming African film and audiovisual sector, and strong interest from young people to get involved in the industry, the present study identified a major gap in educational infrastructure across the continent. Few countries have public institutions that offer post-secondary degree or diploma programmes dedicated to film. The more established institutions include the Institut Supérieur De l’Image et du Son (ISIS) in Burkina Faso, the National Film and Television Institute (NAFTI) in Ghana, the National Film Institute (NFI), located in Jos, Nigeria, and the Institut Spécialisé du Cinéma et de l’Audiovisuel (ISCA) and Higher Institute of Audiovisual and Film Professions (ISMAC) in Morocco.

Public institutions are important because they are theoretically shielded from the vagaries of the market and ensure the sustainability and continuity of education programmes.

A few countries also benefit from prestigious private institutions such as the Ecole Supérieure des Arts Visuels (ESAV) in Morocco and the South African School of Motion Picture Medium and Live Performance (AFDA).

*A film set is the best school for technicians. The more films we shoot, the more we progress. Permits are granted in record time and we facilitate filming with the various authorities.*

Hughes Diaz
Head of the film industry department of Senegal from 2010 to 2021
Interview by Olivier Barlet with Hugues Diaz, Le Soleil, 28 May 2020
However, in many countries, students interested in filmmaking have to settle for peripheral courses in drama, media or journalism. Even when film or television production programmes do exist, practitioners often report that they are obsolete and heavily focused on the theoretical aspects of filmmaking, while learning the craft requires a more practical and technical approach. In fact, practitioners from all countries except Ghana, Kenya, Morocco, South Africa and Tunisia describe the educational programmes currently available locally as inadequate.

The difficult thing in cinema is to become integrated, to make contacts, etc. The aim of the Yennenga Centre (Centre Yennenga) is therefore to support young people in this field and provide them with the additional training they need to move towards professionalization.

*Alain Gomis, filmmaker (Senegal)*

Interview by Olivier Barlet with Alain Gomis, Tunis, Le Soleil 2 and 3 November 2019

The lack of proper film training opportunities limits the ability of African professionals to develop and deliver ambitious creative projects and stifles the growth of the industry as a whole. In response, a number of prominent film and television professionals have taken the initiative over the past few decades to establish their own private training institutions across the continent. In Burkina Faso, director Gaston Kabore created the IMAGINE Institute in February 2003 to provide opportunities for initial training and development in all professions related to cinema, television and multimedia. French-Malian director Ladj Ly opened the Dakar campus of his Paris-based Kourtrajme film school. The school, which is expected to provide a major boost to the cinema industry, not only in Senegal but in the entire Francophone West African region, is partially financed by the French Development Agency (AFD). Also in Dakar, French-Senegalese director Alain Comis intends to focus on postproduction – a weak link in the film sector of most African countries – with the opening of his Yennenga Center. Starting in 2021, the institution will provide a first cohort of 24 young people with a free two-year training course covering editing, mixing and colour grading.

Launched in 2018, the MultiChoice Talent Factory (MTF) develops emerging television and film talent through an accredited 12-month programme including both theory and practical experience in cinematography, editing, audio production and storytelling. With regional academies in Kenya, Nigeria and Zambia, the programme is available to students from 13 countries across Africa. In Nigeria, leading producer Mo Abudu launched the EbonyLife Creative Academy (ELCA) in 2021, a free programme of short creative and practical filmmaking courses developed in partnership with the Lagos State Creative Industries Initiative (LACI). The Realness Institute, a film development organization based in South Africa and already running the Realness African Screenwriters Residency, has partnered with Netflix to launch an Episodic Lab programme for writers from Kenya, Nigeria and South Africa, which will expand to include development executives from across Africa and the diaspora. With regard to e-learning, platforms such as LAFAAAC and Trace Academia are leveraging mobile technology to make training modules available to the largest possible number of students.

The animation subsector distinguishes itself by its potential to create a new service industry on the continent capable of generating a large number of jobs, but most African animators and digital artists are currently selftaught due to the lack of educational opportunities. However, a few solid initiatives have emerged, the largest one being the Tunisian digital arts school NET-INFO, which has trained 15,000 young people from North and Francophone Africa in the fields of animation, 3D imaging and gaming since its establishment in 1999. In Kenya, the Africa Digital Media Institute (ADMI) partnered with leading French school RUBIKA in 2019 to launch a 2D animation course with the support of AFD. Finally, Africa’s largest and most awarded animation studio, the South African Triggerfish, has created Triggerfish Academy, a free digital learning platform for animation in partnership with the Goethe-Institut and the German Federal Ministry of Economic Cooperation and Development.

When I was making Yaaba and Tilai, I was free, I wrote the film in a month; ever since I have started to write with script doctors, I have completely lost my way because I have more knowledge than the people who help me write; in that sense I have been colonized.

*Idrissa Ouedraogo, filmmaker (Burkina Faso)*


All these new initiatives enrich a complex ecosystem that also offers a plethora of labs, masterclasses and workshops such as the Ouaga Film Lab in Burkina Faso, Sud Ecriture in Tunisia and the One Fine Day Films workshops in Kenya, which are organized semi-regularly by film festivals or film development groups across the continent. But even when considered together, they are far from sufficient to meet current needs and do not offer a truly scalable solution. A further challenge is the lack of programme standardization across the board.
The situation in Africa is particularly complicated because there is no production training. Learning always takes place on the job. I sometimes call other women producers to ask for advice, and the network works quite well.

Marie-Clémence Andriamonta-Paes, filmmaker and producer (Madagascar)
Debate "Making known the voice of women in African cinema loud and clear (Porter haut et fort la voix des femmes dans les cinémas d’Afrique)”, Cannes 2020, africultures.com

Overall, the film and audiovisual education sector remains ripe for large-scale intervention, which could take the shape of public-private partnerships (PPP) bringing together governments and private sector experts. One possible model is Kenya, which recently rolled out a standardized film curriculum across the country’s entire network of technical and vocational education and training (TVET) institutions. This initiative, coupled with the various public and private film programmes existing across the country, has led some 1,000 Kenyan students to graduate with certificates, diplomas and degrees in film and broadcast every year.

INTELLECTUAL PROPERTY AND THE PIRACY CURSE

A key challenge to the growth of the film and audiovisual sector in Africa is rooted in the fact that so much of the sector’s revenue is lost to the illegal exploitation of intellectual property, impacting the entire industry, from foreign distributors to local creators. While the illegal reproduction and sale of films and television series on DVDs or more recently on digital files is one major aspect of piracy, it can also take the form of the unlicensed television or Internet broadcast of content, as well as piracy of the broadcast signal itself. Although precise data on this topic does not exist, two-thirds of countries estimated that more than 50% of total revenue is lost due to piracy, with one-third of countries estimating that these losses amount to more than 75%. This number of course reflects a perception rather than a fact, but is still indicative of the prevalence of the problem. The inability to capture the true value of film and audiovisual products on the continent is a deterrent for many investors. Local commercial banks, for example, have thus far refused to accept a project’s intellectual property rights as collateral for loans, while the practice is common in developed markets.

In this regard, national legal frameworks on intellectual property and copyright, although often outdated and in need of improvement, do not seem to be the main culprits. Most nations have at least a law or regulation regarding the protection of intellectual property, and a substantial number of countries – 35 out of 54 according to the research conducted for this report – have established at least one Collective Management Organization (CMO). CMOs act as a link between creative artists and users of works by managing and licensing copyright and related rights, as well as collecting and distributing royalties to their members. However, while in developed markets specialized CMOs exist for each creative industry sector (film and audiovisual, music, live performance, fashion, books, etc.), across the continent only a few are dedicated to the film and audiovisual sector. CMOs face challenges in structure and management, but also, and more importantly, suffer from a lack of participation of rights holders, who are yet to see any benefit from the system. Consequently, most of these organizations are little more than empty shells without legitimacy or accountability, unable to efficiently perform their functions.

The actual enforcement of the regulations already in place appears to be an even greater challenge, especially in countries with scarce law enforcement resources and weak judicial systems. At the height of the DVD/VCD parallel market in the early to mid-2010s in Nigeria, film producers estimated that for every DVD copy sold, nine were fake, robbing them of more than half of their potential profits. Valid efforts by the Nigerian government to seize hundreds of thousands of bootleg DVDs barely made a dent in the pirates’ sophisticated parallel distribution networks. Today, with the black market increasingly moving online, pirates have become even more elusive. Efforts by Nigerian cinema exhibitors and film producers to enhance security around the release of their films have managed to preserve a semi-secure cinema window. Nevertheless, legitimate film distributors are wary of selling films to Netflix too fast, as films get pirated as soon as they are released on the platform.

At the core of the problem is also a deep lack of understanding of intellectual property issues, which concerns all stakeholders from consumers to regulators, law enforcement agencies and filmmakers themselves. In general, consumer attitudes across Africa show a widespread tolerance of piracy, with pirate practices completely normalized and integrated into daily life. Although local content creators lament the revenue lost through the theft of their work, they themselves have no qualms about downloading a film on a peer-to-peer website, for example. These attitudes are by no means specific to Africa, but concern every market where highly desirable content may not be easily or immediately available through legal means and where prices still appear expensive compared to the average person’s disposable income.

On the issue of piracy, technology is a double-edged sword. Although it has played a major role in facilitating the illegal distribution of creative content, it can also help to curb it. Indeed, digital distribution offers an unparalleled opportunity to expand avenues for legitimate consumption of film and audiovisual works through the proliferation of affordable Internet and mobile platforms which abide by copyright regulations.
Gender inequality persists in the film and audiovisual industry across the continent. The largest gap was observed in Central Africa, where 98% of practitioners estimate that the percentage of women in the sector is less than 10%. In Eastern and Western Africa, 50% of practitioners estimate that the percentage of women in the sector falls below 10%.

When I make a film, I do not attempt to apply a theoretical vision. I put a system in place in order to enable certain realities and truths to naturally impose themselves. I think this is also the case for the women in “Bamako”, in the role they play in the court, in the trial and in the hearing. In fact, they suffer the consequences of the economic phenomena that are discussed even more than men.

Abderrahmane Sissako, filmmaker (Mauritania)  
Interview by Olivier Barlet with Abderrahmane Sissako for Africultures regarding Bamako, Cannes 2006

These estimates naturally hide a wide range of situations. Through a number of prominent filmmakers tackling feminist issues, North African countries like Morocco (with Saâd Chraïbi, Naoufel Berraoui, Narjiss Nejar, Leïla Kilani) and Tunisia (Salma Baccar, Néjia Ben Mabrouk, Kalthoum Bornaz, Moufida Tlatli, Raja Amari, Nadia el Fani, Sonia Chaouki, Hinde Boujemaa, Kaouther Ben Hania, Leyla Bouzid) lead the way with regard to female representation on screen and behind the camera. Elsewhere on the continent, Nigeria is the exception, as its sector is dominated by female producers (Mo Abudu, Jade Osiberu and Omoni Oboli), directors (Kemi Adetiba, Funke Akindele and Tope Oshin) and actresses (Funke Akindele, Genevieve Nnaji, Toyin Abraham, Omoni Oboli and Adesua Etomi). There are also a number of prominent female filmmakers in Kenya (with directors Wanuri Kahiu, Judy Kibinge, Hawa Essuman, and producers Tony Kamau and Dorothy Ghettuba – now at Netflix) and Senegal (with directors Angèle Diabang Brener, Katy Léna Ndiaye, Rama Thiaw and Mati Diop, among others). Furthermore, other countries such as the Gambia, Rwanda, South Africa, South Sudan, Sudan, Zambia and Zimbabwe all estimate women’s representation in their film and audiovisual industry to be at least 30%. In general, however, the large majority of technical roles are occupied by men.

Women’s perspectives and expressions in all artistic fields, as well as in other areas, are now remaking history.

Anissa Daoud  
Filmmaker (Tunisia) • Debate “What do they have to say to us, what do you have to say to us, women filmmakers of Africa? (Que nous disent-elles, que nous dites-vous, femmes cinéastes d’Afrique ?)”, Apt African Film Festival (Festival des cinémas d’Afrique d’Apt) 2021, africultures.com
Initiatives to support the growth and inclusion of female writers, directors and producers exist across the continent, but they lack resources and have not yet had a major impact. In Zimbabwe, director Tsitsi Dangarembga has been a leading gender equality activist for decades through Women Filmmakers of Zimbabwe, while Sisters Working in Film and Television (SWIFT), an NGO led by South African director Sara Blecher, works to unite, engage and advocate for women in film and television across the continent.54

I come from a culture in which women’s freedom is like a bicycle: if you don’t pedal, the bicycle falls over! It is a daily struggle.

Marie-Clémence Andriamonta-Paes, filmmaker and producer (Madagascar)
Debate “Making known the voice of women in African cinema loud and clear (Porter haut et fort la voix des femmes dans les cinémas d’Afrique)”, Cannes 2020, africultures.com

In 2017, the #MeToo movement against sexual assault and discrimination in the workplace shook up the American film and television industry following the exposure of widespread sexual abuse allegations against producer Harvey Weinstein.

The movement sparked a major debate about the treatment and representation of women in Hollywood and led to radical changes in the way studios, networks and production companies do business. Although the movement kept a lower profile in Europe and did not reach as far as Africa, it is most likely a sign of things to come.

Another area in which little progress has taken place recently is the issue of freedom of expression. Practitioners from at least 47 countries (87%) report some type of limitation to the topics they are allowed to address in their work.

Sensitive issues such as lesbian, gay, bisexual, transgender and queer (LGBTQ) rights, sex (blatant pornography is widely outlawed), religion, politics, conflict or ethnicity are often better avoided when not completely banned. Local broadcasters have been known to edit scenes in films and series, both local and international, that may offend local audiences or directly clash with local broadcasting codes.

While these red lines are often implicit, at least 37 countries (68.5%) have an official censorship board or a classification board charged with vetting projects before they can be released to the public. In many countries, filmmakers have to apply for a film permit which requires their scenario to be approved before production. Filmmakers attempting to break local taboos place themselves at risk of being refused permission to film or of being censored.

Contrary to the Western perspective of the term “censorship”, which has a negative connotation – referring to the active curtailing of freedom of expression – this concept is considered in terms of its utilitarian function by African regulators. Indeed, it is considered a necessary measure to protect populations against threats to African values and indigenous cultures, which are posed by ideas that are considered immoral and foreign, and the threat to national security caused by topics that can divide communities.

These rules, whether justified or not, explicit or self-imposed, act as powerful psychological constraints curbing the creativity of many filmmakers.

I do not let producers make decisions, even about a single image. Otherwise, it would no longer be my film. The agreement with the people I worked with in Europe was that they would accept that I control my intellectual property rights. I have 40 percent ownership. They only have co-ownership and have no say in the aesthetic choices of my film.

Haïlé Gerima, filmmaker (Ethiopia)
Interview by Hassouna Mansouri with Haïlé Gerima regarding Teza for Africultures, Carthage Film Festival, Tunis, 2009

Safeguarding Africa’s Film and Audiovisual Archives

Africa’s film and audiovisual archives constitute an invaluable repository of the continent’s history and culture. However, due to diverse turmoil and extreme climate conditions, many early documents never enjoyed proper storage in their home countries. The audiovisual archives stored locally have been slowly deteriorating due to inadequate preservation methods and resources, and the first documents from the 1950s have already been lost.

In April 2021, a wildfire that started on the slopes of South Africa’s Table Mountain destroyed the University of Cape Town campus and historic library, which housed a priceless African Studies collection including 3,000 African films and 20,000 other audiovisual items.55 Experts are currently inspecting the site to determine how much of it can be saved.

With no legal obligation for a deposit system on the continent, the first and often only stakeholders in the field of preservation are the national film archives.
Only eight African countries have such an institution: Algeria, with the Centre Algérien de la Cinématographie in Algiers; Egypt, with the National Film Archive in Cairo; Morocco, with the Centre Cinématographique Marocain in Rabat and the Cinémathèque de Tanger; Tunisia, with the Centre National du Cinéma et de l’Image in Tunis; South Africa, with the National Film, Video and Sound Archives in Pretoria; Nigeria, with the National Film, Video and Sound Archive in Jos; Mozambique, with the Instituto Nacional das Industrias Culturais e Criativas in Maputo; and Burkina Faso, with the Cinémathèque Africaine de Ouagadougou - FESPACO.56

Regarding celluloid archives, the best surviving elements for historic African films are almost never found in Africa but in the national film archives of France, the United Kingdom and other European countries, and at various Western universities with African film departments. This means that these pioneering films are not available in educational institutions across Africa. As a result, very few people, and especially African audiences, know about the continent’s cinematographic heritage.

Nevertheless, safeguarding the collective memory of African countries is currently the concern of many stakeholders. In November 2004, West African Francophone nations signed the International Appeal for the Preservation of the World Audiovisual Heritage, recognizing the need to safeguard and enhance their audiovisual heritage. Since then, the International Federation of Television Archives (IFTA), the International Organization of la Francophonie (IOF), the French National Audiovisual Institute (INA) and the West African Economic and Monetary Union (WAEMU) have collaborated to develop a common cultural development policy, which was adopted in 2013.
Beyond the simple desire to protect audiovisual heritage, this reflection is also part of a commercial logic to exploit the economic potential of audiovisual archives. The “Digital Capital” project, implemented by IOF over the period 2014-2016 and co-financed by the Secretariat of the Organisation of African, Caribbean and Pacific States (OACPS) and INA, connected the archives of 19 sub-Saharan African countries and Haiti to the “Archibald” website, a centralized archive platform offering local storage, digitization and indexing support.

We cannot overlook the essential long-term work of awareness-raising and lobbying, and only the FEPACI has the moral and technical legitimacy to undertake it.

Gaston Kaboré, filmmaker (Burkina Faso)
Interview by Olivier Barlet with Gaston Kaboré for Africultures, Ouagadougou 2005

Several preservation initiatives seem to have faced implementation challenges. As part of the “Digital Capital” project, hundreds of films and television series financed by the Fonds Image de la Francophonie (formerly Fonds Francophone de Production Audiovisuelle du Sud) over the past 25 years and digitized by the Bibliothèque Nationale de France (French National Library), were also to be made available for rebroadcast by distribution company Côte Ouest Audiovisuel. This was apparently never achieved. Another possibly abandoned initiative is M-Net’s African Film Library which, in 2012, promised to offer the largest ever collection of award-winning African films available on demand online. M-Net had negotiated the rights to around 700 works and embarked on the digitization and restoration of the work of some of the continent’s finest filmmakers, including Ousmane Sembène, Djibril Diop Mambéty, Moussa Sene Absa and Ababacar Samb-Makharam. However, today the African Film Library website no longer exists. Finally, the African Film Heritage Project (AFHP), a partnership signed in 2017 between FEPACI, American filmmaker Martin Scorsese’s Film Foundation, the Cineteca di Bologna and UNESCO aimed to restore and preserve 50 African films of historical, cultural and artistic significance. Four years later, the results are unclear. Since then, four major films by some of the most important filmmakers in the history of African cinema have been restored, including Oh, Sun (1970) by Mauritanian director Med Hondo, Chronicle of the Years of Embers (1975) by Algerian director Mohammed Lakhdar-Hamina, The Woman with the Knife (1969) by Ivorian pioneer Timité Bassori and Muna Moto (1975) by Cameroonian director Jean-Pierre Dikongue-Pipa.

The mass digitization of African film and media provides hope for the ongoing efforts to recover and preserve fragile content previously stored on analogue formats. It will also make the archiving of audiovisual material much simpler in the future. However, the continent still lacks professional archivists trained in identification, cataloguing and preservation, as well as technical equipment and basic infrastructure such as air-conditioned vaults.
THE AFRICAN CONTINENTAL FREE TRADE AREA AND HOPE FOR MORE PAN-AFRICAN COLLABORATION

In March 2018, the historic Agreement Establishing the African Continental Free Trade Area was signed by 52 African countries, establishing the African Continental Free Trade Area (AfCFTA) – the largest free trade area in the world in terms of participating countries since the establishment of the World Trade Organization over two decades ago. On 1 January 2021, AfCFTA became reality, bringing together some 1.3 billion Africans into the same market, for a combined GDP of more than US$3 trillion. The core goal of AfCFTA is to encourage the free movement of “Made in Africa” goods and foster intra-African trade. According to United Nations Conference on Trade and Development (UNCTAD), between 2015 and 2017, intra-African trade averaged 2%, compared to intra-continental trade figures of 47% for the Americas, 61% for Asia, 67% for Europe and 7% for Oceania. In fact, most African countries trade more with some European countries than with their direct neighbours.

The AfCFTA agreement is to be implemented in stages. The first will focus on the removal of tariffs on 90% of goods, and of other trade barriers between African countries, within the next 10 years. The impact of the AfCFTA implementation process on the creative industries is being monitored by the Africa Technology and Creative Group (ATCG), a grassroots effort uniting a coalition of technology and creative professionals from 30 African countries, working in start-ups, innovation hubs, media, film and music. Although the removal of trade tariffs is expected to have a positive impact on some creative industries such as fashion and textile, this is unlikely to impact the film and audiovisual sector as video products are already fully digitalized and film equipment will continue to be imported from outside the continent.

Some film and audiovisual practitioners hope that AfCFTA may lead to more co-productions between African countries. However, this perception is largely based on a misunderstanding of the AfCFTA Agreement and of the mechanics of international co-productions.

While non-official co-productions can always – and do regularly – take place between countries based on privately-funded and commercially viable partnerships, official co-productions are based on co-production treaties between specific countries. The key attraction of a treaty co-production is that it qualifies as a national production in each of the partner nations and can therefore access the multiple benefits available to the local film industry in each country. It is only beneficial if the two signatory countries offer such benefits, which can include tax breaks, access to local financial resources or inclusion in domestic television broadcast quotas. As mentioned above, very few African countries currently offer this type of support.

The second stage of AfCFTA implementation is more relevant as it will focus on intellectual property rights, including the ability of rights holders to register ownership of intellectual property through a single process that would cover the entire continent. The objective will be to create a single, unified jurisdiction for the administration of intellectual property rights in Africa, theoretically making laws in this area more enforceable and thus raising the value of intellectual property generated in Africa. The expectation is that added certainty, stability and confidence in intellectual property rights would encourage creativity and innovation across the continent.

Finally, an indirect but potentially powerful impact of the AfCFTA framework on the film and audiovisual sector is that the Free Trade Area is likely to facilitate the financing and implementation of continent-wide communications infrastructure projects such as the One Africa broadband network, initiated in 2018 by Liquid Telecom and Telecom Egypt. The 60,000km terrestrial network will extend from Cairo to Cape Town, providing an inland alternative to the multiple undersea cables connecting Africa’s coastal countries to the global Internet. Improving Internet connectivity and thus cloud computing, data storage and eventually consumer video streaming is a key driver of growth for the content industry.

Although it may be too early to fully grasp the concrete impact that the AfCFTA may have on the pan-African film and audiovisual sector in years to come, its existence is a strong positive indicator of the desire of African nations to foster new modes of collaboration and to spread best practices across the continent.

NEW PARTNERS: THE UNITED STATES AND CHINA

Traditionally, foreign support has been provided to the African film and audiovisual ecosystem in the shape of subsidies from intergovernmental institutions such as: IOF; the Africa, Caribbean and Pacific States - European Union (ACP-EU) Culture Programme; or selective mechanisms such as: the French National Centre of Cinematography and the Moving Image (CNC), through the World Cinema Support Fund; and the Berlinale, through the World Cinema Fund. France in particular has been a major funder of African films for decades, through co-production treaties signed with countries such as Algeria, Burkina Faso, Cameroon, Côte d’Ivoire, Egypt, Guinea, Morocco, Senegal, South Africa and Tunisia.
These support mechanisms relying on public funds follow a vision whose primary goal is to promote the diversity of cultures, without any expectation of profit. Today, France, the United Kingdom, Belgium, Germany, Portugal and the European Union in general remain important stakeholders of African auteur cinema. Through the funding of many development initiatives such as film labs, workshops and festivals, European countries continue to play a key role in the emergence of the African world-class talent that is now in high demand by financiers, buyers and co-production partners both locally and globally.

However, the past couple of years have seen a marked increase in interest from other stakeholders. These new stakeholders, mostly from the United States and China, are private companies with a decidedly commercial approach. The most visible American player so far has been Netflix, which has produced a number of high-profile moves since its launch on the continent in 2019. The streaming service accounted for 57% of Africa's subscription video-on-demand (SVOD) subscriptions in 2020 with almost two million subscribers, a number that is expected to grow to 6.3 million by 2026. In November 2020, the company even appointed Zimbabwean Econet founder Strive Masiyiwa to its board of directors. Netflix, however, is only the first American platform to launch on the continent and, eventually, others will follow. For instance, despite not launching in Africa until 2022, Disney+ is already predicted to sign up 3.1 million subscribers by 2026.

Spurred by a new focus on Black content born out of the 2020 Black Lives Matter movement and inspired by the global success of the blockbuster Black Panther, Hollywood companies have also been busy partnering with African creators on a variety of projects. In 2020, Walt Disney Studios signed a deal with Kugali, a company co-founded in 2017 by two Nigerians and a Ugandan, to make Iwójú (The Future), a science fiction series steeped in Yoruba culture. Walt Disney Studios are also financing Greek Freak - a feature film by Nigerian director Akin Omotoso about NBA star Giannis Antetokounmpo, born in Greece to Nigerian parents, and picked up the rights to Kiya, a series developed by South Africa's Triggerfish about a group of seven-year-old African girls whose magical headbands turn them into superheroes. In Nigeria, EbonyLife Studios signed a deal with Will Smith and Jada Pinkett Smith’s Westbrook Studios to co-develop and co-produce a range of Afrocentric films and television shows, and also has projects underway with Netflix, Sony Pictures Television and AMC. These few examples are just the tip of the iceberg as Hollywood players have been quietly ramping up their behind-the-scenes involvement with African film and television talent.

Meanwhile, China, now officially the largest box office market in the world in terms of revenue, has also been making inroads into the continent. In 2019, Chinese media giant Huahua Media signed a deal with Nigerian studio FilmOne Entertainment to co-produce the first major China-Nigeria film, and invested in Nigeria’s first million-dollar film fund, also run by FilmOne Entertainment. Chinese-owned music streaming service Boomplay, currently one of the leading music platforms on the continent with over 75 million users, made its first move into video production by investing in AfroBeats: The Backstory, a 9-episode documentary series about the origins of the popular Nigerian music genre. Other major investments in the media space by StarTimes (local pay television channels), CCTV Africa (Nairobi-based media hub), and Huawei (optical cables and 5G technology) point to a solid and growing Chinese interest in African creative content.

When making films today, our business plans can include distribution on a platform like Netflix, and the profits can then be calculated in accordance with the greater number of viewers.

Lala Akindoju, actress (Nigeria)
Debate “What economic viability for African cinema?, (Quelle viabilité économique pour les cinémas d’Afrique ?)” Cannes 2020, africultures.com

Although mostly focused on Africa’s English-speaking regions for the moment, these new players have also expressed an interest in expanding to Francophone and Portuguese-speaking Africa. Both the United States and China are strong proponents of a market-focused, commercial approach to African film and television, which will lead to the disruption of previous financing models. A future in which the African continent carries solid potential for commercial returns is in sight, attracting a new category of investors, such as Impact X Studios, a new fund that seeks to develop and package diverse projects globally, including in Africa. Impact X’s first investment in Africa, announced in 2020, was with the Nigerian comics and animation company YouNeek Studios.

This new global demand is unlocking new funding opportunities, even from the continent itself. Development bank Afreximbank, which in 2020 had announced the launch of a US$500 million facility to support the African creative industries, is now working on the first pan-African film funding mechanism. The project, once completed, would provide African-sourced and managed funding, through a variety of financing products, to commercially viable projects from across the continent.
Part 1 • Pan-African trends shaping the future of the continent's film and audiovisual sector
Part 2

Strategic development and growth models
The analysis of the film and audiovisual landscape in 54 African States reveals a number of successful characteristics shared by countries that present similar profiles. These particular approaches and best practices constitute the basis for the four strategic development and growth models described below:

- the Nollywood model
- the Auteur model
- the Service model
- the Festival model

Each of these strategic models proposes recommendations that aim to support the development of the national film and audiovisual sector. Countries presenting specific "hard" characteristics (such as existing infrastructure or population size) and "soft" characteristics (such as language or culture) will find themselves naturally better suited to one of the four models and our hope is that that particular model, which may help them to define priorities for action.

However, it is also important to note that no two models are mutually exclusive: in theory, two or even several models could be pursued in parallel by the same country. For instance, Rwanda is one example of a country which is on track to leverage each of these four strategic areas. As illustrated in its cartography, Rwanda is currently experiencing a market-driven boom in low-cost, Kinyarwanda-language, "made-for-the-web" productions (Nollywood model). It also boasts a group of talented and recognized directors, well-connected to the international cinema scene (Auteur model). A film policy and incentive package are being developed to turn the country into a leading film location for foreign productions (Service model), while the Kigali Audiovisual Forum is poised to act as an anchor for Rwanda’s soft power ambitions (Festival model).

Rwanda’s example demonstrates that political will and active leadership – not financial resources – are the key ingredients to unlocking growth in the film and audiovisual sector. Indeed, the recent successes of other forward-thinking countries such as Kenya, Mauritius, Namibia and Senegal illustrate that much can be achieved even where funds are limited.

### THE NOLLYWOOD MODEL: COMMERCIAL, HOME-GROWN, THRIVING

#### CHARACTERISTICS OF THE MODEL

Although the history of Nigerian cinema is much older, the term Nollywood commonly refers to the period starting with the direct-to-video boom of the early 1990s. The Nollywood model is characterized by its low-cost, speedy production mode, which enables producers to complete a film for as low as US$15,000 in a matter of weeks. Even in Nigeria, producing a film for such a restricted budget is a stretch: it requires ingenuity, resourcefulness and stamina from both cast and crew, all working around the clock in conditions that would be unacceptable elsewhere.

As in other commercial markets, such as the China, India and the United States, Nigerian production budgets are also privately-funded. Producers may reinject the proceeds from a successful project into a new one or raise money from individual private investors, such as friends, family or high income acquaintances. Brand sponsorships and product placement are possible for some of the larger productions.

In a context of rampant piracy, volume is key to achieving maximum profit in minimum time. According to the Filmmakers Cooperative of Nigeria, in 2014, every film in Nigeria had a potential domestic audience of 15 million people and an international audience of some 5 million outside the country. That number is likely to be much higher today. To leverage this potential audience, effective distribution is essential. Nollywood films – initially sold directly to consumers on DVDs and VCDs through powerful countrywide street vendor networks – are now widely distributed online and on television across Nigeria, in Africa and amongst the diaspora. Since the mid-2000s and the emergence of higher-quality, more ambitious, higher-budget productions (between US$150,000 and US$750,000 on average), sometimes referred to as “New Nollywood”, the best films are also released in cinemas. If successful, a Nigerian film can expect to recoup its entire budget through ticket sales, with subsequent ancillary sales (television, airlines, VOD) bringing in pure profit.

However, the Nollywood model cannot be limited to its pragmatic, market-based, unabashedly commercial approach. Another major component of its success has been its ability to largely ignore the external cinema world and American and European tastes to develop a home-grown style of storytelling that resonates deeply with Nigerian and African audiences, in part through its blunt portrayal of popular themes such as religion, witchcraft, morality and revenge. Liberated from Western expectations of what cinema should look like, Nollywood (just like Bollywood) has proven that another path is possible. Today, the global cultural influence of Nigerian films and their glamorous stars is such that non-Nigerian audiences in Africa and elsewhere have adopted Nigerian mannerisms, slang, jokes and ways of dressing.

#### FAVOURABLE CONTEXT

The Nollywood model of development can help other African countries to build fully home-grown, self-sustaining commercial industries.
Because a key prerequisite for this model is a substantial volume of sales, it is better suited to countries with large local markets, such as the Democratic Republic of the Congo, Ethiopia or Tanzania. However, the recent success of Rwandese web series proves that even countries with smaller markets can adopt this approach if they are able to tap into their larger diaspora communities and are realistic about matching production budgets to revenue potential.

**RECOMMENDATIONS**

On the production side, countries choosing to pursue this model could focus on removing administrative and tax barriers to allow private initiatives to thrive. This means facilitating equipment purchases and access to filming locations, as well as simplifying the process to register a production company or to apply for a film licence.

Developing the distribution segment of the value chain is also crucial. Governments can play a role by: further investing in Internet infrastructure with the content industry in mind; facilitating country-wide Internet access at affordable rates; implementing local content broadcast quotas; encouraging content sponsorship by local investors through tax rebates; and working with strategic partners such as global social media companies (YouTube, Facebook, Instagram, TikTok), mobile operators and independent local platforms to create conditions that would allow content producers to monetize their work.

Finally, the emergence of a pool of popular local actors and actresses is an important part of this model, as their star power is a major driver of sales. Governments can be involved by supporting promotional events such as award ceremonies, festivals and film premieres, and by engaging local talent as masters of ceremony or ambassadors for social initiatives, in order to boost their profile.
THE AUTEUR MODEL: RICH CULTURES, DIVERSE VOICES

CHARACTERISTICS OF THE MODEL

In direct opposition to the Nollywood model, the Auteur model is driven by a vision of cinema as an art form which should not necessarily be subject to the vagaries of the market. While the Nollywood model can be compared to the Hollywood system, the African Auteur model is similar to the European – and more specifically the French – approach. From the French perspective, cinema and other creative works are public goods which must be supported by the state with a view to promoting a diversity of cultures, voices and viewpoints. This vision highly values the person considered to be the “auteur” of the work, namely the director, while the American and Nigerian models see films more as a collective and collaborative endeavour.

Consequently, the Auteur model exists mostly in Francophone African countries that have benefited over the past decades from access to French public funding, such as Burkina Faso, Côte d’Ivoire and Senegal. However, it can also be found in other places where groups of filmmakers have managed to navigate the complex world of European film subsidies, such as Kenya, Rwanda and the Portuguese-speaking countries connected to Portuguese support schemes.

A key component of this model is the premium placed on education, training and talent development, especially for writer-directors. Initiatives funded by European countries, such as the Ouaga Film Lab in Burkina Faso, Sud Écriture in Tunisia, the One Fine Day Films workshops and Docubox in Kenya, La Fabrique du Cinéma in Cannes, the Less is More script workshops, the Realness African Screenwriters Residency, the Berlinale Talents programme and the Atlas Workshops in Marrakech have been instrumental in unearthing and nurturing a new generation of African filmmakers who are now being noticed on the international scene. The films developed through these labs and workshops are typically financed through co-productions, often involving multiple countries and multiple public funding streams, for budgets of up to US$1-1.5 million – an amount completely disconnected from the realities of local markets.

The types of films that emerge from these development schemes are creatively ambitious and often socially conscious, but are not always successful with local audiences.
Their typical journey involves an extensive festival run, where they can hope to collect awards and secure an international distributor who will handle foreign sales. A few of these films may also be released in art house cinemas in Europe. Some may generate actual revenue through television or VOD sales, but there is no expectation of profit from the European public funders.

Indeed, the main objective of the Auteur model is to promote artists who can shine globally and whose work can spark debate and achieve critical success. A variety of economic benefits can be derived from the prestige accorded to the countries of origin of award-winning directors such as Abderrahmane Sissako (Mauritania), Nabil Ayouch (Morocco), Lemoçang Jeremiah Mosese (Lesotho), Mati Diop and Alain Gomis (Senegal), Sibon Shongwe-La Mer (South Africa), Rungano Nyoni (Zambia), Joël Karekezi (Rwanda), Wanuri Kahiu (Kenya), Philippe Lacôte (Côte d’Ivoire) and Kaouther Ben Hania (Tunisia). The soft power of cinema is such that one single successful film can make an entire country more attractive to tourism and foreign investment.

FAVOURABLE CONTEXT

The Auteur model is particularly relevant for countries lacking the local market to support a full-fledged film and audiovisual sector. A key criterion is the ability to access funding from institutions such as the CNC (through the Aide aux Cinémas du Monde), IOF, ACP-EU and the Berlinale World Cinema Fund, and through co-productions with European countries with strong film support mechanisms such as Belgium, France, Germany, and the Nordic countries. Although most African countries are automatically eligible for these types of funds, the grant proposal process is so complex that it requires experienced producers to unlock it.

RECOMMENDATIONS:

Countries interested in pursuing the Auteur model could focus on building relationships with funding partners, ideally through the signature of co-production treaties, but also by engaging with foreign cultural centres and hosting cross-cultural events such as foreign film festivals. Governments could also consider sending official delegations and supporting local filmmakers’ travels to the main international film markets (such as the Marché du Film in Cannes and the European Film Market in Berlin) where key partnerships are born.

Artistic education is essential for the Auteur model and a strong school arts curriculum can provide fertile ground for a country’s future film talent. Governments could also invest in advanced skills development programmes for writers, directors and producers, and financially support talent to attend such programmes elsewhere if they are not available locally.

Finally, the Auteur model thrives in environments where creative industry professionals have the freedom to tackle difficult topics. Governments can be supportive by ensuring that filmmakers do not feel threatened when expressing opinions that may challenge social norms.

THE SERVICE MODEL: SERVICING THE GLOBAL MARKET

CHARACTERISTICS OF THE MODEL:

The global content market is booming. “Thanks to streaming, we may never reach the peak of ‘peak TV,’” wrote Quartz in January 2020. As studios and producers around the world scramble to meet global streamers’ insatiable hunger for content, several African countries are well-positioned to take advantage of the demand for advantageous filming locations through the Service model.

As its name implies, this model is based on the development of a local film industry that is purposely structured to provide production and postproduction services to international projects. Morocco, South Africa and, more recently, Mauritius have established themselves as continental leaders in this area. In Morocco, the Centre Cinématographique Marocain has been strategically positioning the Kingdom as a filming destination since the late 1980s, with the construction of modern film studios in the south, a 20% tax rebate on eligible expenses and various other support measures. Foreign films and television series filmed in Morocco generated nearly US$90 million for the country in 2019. South Africa’s film industry is among the oldest in the world and its technical talent, including its visual effects specialists and post-production professionals, are recognized among the best in the world. In addition to the country’s appeal for foreign productions is a host of co-production treaties giving partner countries access to a 20-25% tax rebate and top-of-the-range film studios in Cape Town. Meanwhile, having arrived a bit later on the scene, Mauritius has adopted a particularly aggressive Film Rebate Scheme offering up to 40% on qualifying expenses. This scheme – the largest in Africa and one of the most generous in the world – instantly makes Mauritius very competitive as a global film location.

As these examples illustrate, a few elements are key to the Service model: solid transport and film infrastructures, co-production treaties and tax rebates, and a large pool of well-trained technical professionals. In addition to Mauritius, Morocco and South Africa, other countries that already boast a variety of natural and urban landscapes and good infrastructure, such as Kenya, Namibia and Rwanda are in the process of filling the gaps in film policy and human capital in order to pursue this strategy.
For countries with the adequate profile, the Service model is one of the most lucrative models. In addition to the revenue generated directly by foreign productions (through visas, film licences, accommodation and transport costs; location, studio and equipment rentals; cast and crew salaries; and catering etc.), these films and television series often turn out to be great showcases for the host country’s best landscapes, becoming a major asset for the tourism sector. For example, the film *The Breakup Guru* (2014),7 shot entirely in Mauritius, was seen by an audience of over 40 million in China and as a result Chinese tourism increased by over 500%, according to the Mauritius Film Development Corporation.

Finally, one sub-sector of the African film and audiovisual industry which could also greatly benefit from the Service model is animation. The emerging leader in this area is Tunisia. Established in 1999, Tunisian-based digital arts school NET-INFO8 has trained 15,000 young people in the fields of animation, 3D imaging and gaming, most of whom are now employed by local companies collaborating with global European and American players.

South Africa also distinguishes itself in this respect, with leading studio Triggerfish providing animation services for major international television shows produced by Magic Light Pictures (United Kingdom).

**FAVOURABLE CONTEXT**

Ideal candidates for the Service model are countries with stable political environments, good infrastructure and diverse scenery.

**RECOMMENDATIONS**

Countries seeking to pursue this strategy could invest time and resources to develop attractive tax rebate schemes and negotiate co-production treaties, as financial incentives are often the first item on an international producer’s list of prerequisites when selecting a foreign filming location.

Investment in film infrastructure and equipment such as modern film studios and sound stages, and post-production facilities, is another key component of the business model. Indeed, the ability to offer this type of facility and services maximizes the number of days (and budget) spent on-site by foreign productions.

Perhaps the greatest challenge is the development and retention of highly trained film professionals able to perform according to international standards. This requires investment into solid, practical film training programmes with the capacity to produce a sufficient number of graduates in each discipline to ensure that the pool of local technicians is large enough to service multiple productions simultaneously.

**THE FESTIVAL MODEL: SOFT POWER AND THE LAW OF ATTRACTION**

**CHARACTERISTICS OF THE MODEL**

The last growth strategy that has been identified is the Festival model which, in a way, presents a counter-intuitive approach because it focuses on the promotion segment of the value chain rather than on production, talent development or infrastructure, which are the focus areas of the previous three models.

The Festival model allows a country to boost a sluggish or non-existent local film sector by establishing itself as a major supporter of cinema or television through the organization of a notable international event such as a festival or audiovisual marketplace. The main proponent of this model is Burkina Faso, whose status as “the capital of African cinema” stems from the country’s establishment of the historic film festival FESPACO, held biennially in Ouagadougou since 1969. Recognized formally as an institution by governmental decree in 1972, FESPACO’s budget is partially covered by the state, which explains its longevity. The aura of this iconic festival has enabled Burkina Faso to greatly transcend its resource limitations and exert cultural influence on the global stage.

A key aspect of the Festival model is the choice of a clear niche in which the country can take decisive leadership. Several nations have been following this strategy and have established specific areas of influence. For example, Tunisia has positioned itself as a champion for African and Arab cinema and a promoter of South-South cooperation through the Carthage Film Festival. Launched in 1966, the Carthage Film Festival is the oldest in Africa. It is also where FEPACI was created in 1970. Meanwhile, as the host of DISCOP Africa (Abidjan), the largest audiovisual market in Francophone Africa, Côte d’Ivoire has established itself as Francophone Africa’s audiovisual hub, which provides an opportunity for the country to create jobs for young people and businesses for independent Ivorian producers. The next edition of DISCOP Africa, however, will take place in December 2021 in Kigali, Rwanda, alongside the Intra-African Trade Fair (IATF) organized by Afreximbank.

Other countries that have experimented with the Festival model, with varying degrees of success, include: Morocco, with its star-studded Marrakech International Film Festival bringing Hollywood to Africa; Tanzania, which positioned itself as the hub for Swahili-language content with its Zanzibar International Film Festival (ZIFF);
Nigeria, which has attempted to establish an Oscars-inspired ceremony with its Africa Movie Academy Awards (AMAA); Kenya, vying for regional leadership with its Kalasha International Film and TV Market; and South Africa, whose Durban International Film Festival is home to the continent’s best film market, the Durban FilmMart.

The Festival model uses the allure of cinema to shine the spotlight on a specific country or region, in the same way that it has made the city of Cannes the world’s most prominent focal point for the global film and audiovisual industry through its hosting of the Festival de Cannes and Marché du Film, MIPTV, MIPCOM and MIDEM. By welcoming leading regional and global players on its soil, the host country builds its own soft power. But more importantly, the prestige of the event itself often ignites other desires and opens further doors: because the platform exists, filmmakers are driven to create, the government is encouraged to provide support, competition with other countries raises the need to improve local capacity, and more resources are channelled into education programmes – a virtuous cycle that can lead to some sustainable results.

FAVOURABLE CONTEXT

The Festival model can technically be adopted by any country, as long as its chosen niche is clear and that the event does not compete directly with another regional event in terms of theme or calendar. However, certain criteria such as the availability of movie theatres that meet international standards, modern conference centres, good quality accommodation and ease of travel to the location are important to attract foreign participants.

“The Festival model uses the allure of cinema to shine the spotlight on a specific country or region, in the same way that it has made the city of Cannes the world’s most prominent focal point for the global film and audiovisual industry through its hosting of the Festival de Cannes and Marché du Film, MIPTV, MIPCOM and MIDEM. By welcoming leading regional and global players on its soil, the host country builds its own soft power. But more importantly, the prestige of the event itself often ignites other desires and opens further doors: because the platform exists, filmmakers are driven to create, the government is encouraged to provide support, competition with other countries raises the need to improve local capacity, and more resources are channelled into education programmes – a virtuous cycle that can lead to some sustainable results.”

Festivals have always been political. We see recruiters, as in football, moving from one festival to another, within the framework of truly international careers. However, the programming of international festivals are tending to become more diverse. This makes the Carthage Film Festival (Journées cinématographiques de Carthage) and the FESPACO even more important, since they select films within an African context. They are therefore free of the “what’s happening over there” approach.

Alain Gomis
Filmmaker (Senegal) • Interview by Olivier Barlet with Alain Gomis, Tunis, Le Soleil 2 and 3 Nov.
RECOMMENDATIONS

Countries interested in pursuing this model are strongly encouraged to provide public funding to support the organization of the event in the long-term, ensuring that it becomes a permanent feature of the annual film and audiovisual industry’s calendar.

In addition to the lack of financial resources, poor handling of the event’s logistics is one of the main issues plaguing several of the events mentioned above, including FESPACO. Special efforts should be devoted to making sure that local and international participants have a positive, professional experience at the event, if necessary by hiring an experienced event management company.

With regard to themes, some have not been claimed yet and remain available to countries wishing to adopt the Festival model. For example, despite growing interest, there is no continental festival or market dedicated to television series apart from Séries Series Africa – the offshoot of the French event Séries Series – which has taken place so far in Ouagadougou and Abidjan.

Also missing is a prominent continental showcase for African animation, gaming and digital arts, although highly-regarded festivals do exist in Meknes (Festival International de Cinéma d’Animation de Meknès – FICAM), Abidjan (Abidjan Animation Film Festival – FFAA) and Lagos (Lagos Comic Convention).

Finally, the boom in African documentary filmmaking suggests that the continent is ready for a premium documentary event, despite the achievements made for many years by the Encounters South African International Documentary Festival and the iREP International Documentary Film Festival (iREP) in Nigeria.
Finally, our research has shown that all countries, irrespective of their strategic development model of choice, would benefit from implementing at least a basic “starter-pack” toolbox of measures, which would provide fertile ground for any further action. These measures could include:

### INSTITUTIONAL AND REGULATORY FRAMEWORK

- A national film and audiovisual policy or, at the very least, a strategic orientation document defining development objectives and listing priority actions.
- A dedicated government or parapublic body such as a film commission, film board or film association whose leadership has proven experience in the film and audiovisual sector, to act as a coordination and regulatory body for all industry stakeholders.
- An updated intellectual property law or regulation taking into account digital distribution and an implementation framework that includes a film and audiovisual CMO.

### FUNDING SOURCES AND MECHANISMS

- Basic production incentives in accordance with each country’s economic situation. These could include “no money out” measures such as tax holidays for local production companies, tax rebates on production expenses, lower import tariffs on film equipment, tax rebates for local content sponsorship from private sector companies and local content broadcast quotas.
- Additional production incentives could include the creation of a fund financed by the revenue collected from foreign crews’ visas, film licences or other expenses; broadcasters’ licence fees; and a share of existing taxes on cinema tickets, Internet access or the sale of viewing devices such as televisions, computers and mobile phones.
- Tax rebates on earnings for creative industry professionals (directors, actors, etc.), which could have a positive impact on the production segment of the value chain by lowering production budgets.

### EDUCATION AND TRAINING

- At least one practical training programme or facilitated access to online training tools.
- Professional exchanges and internships.
- Sponsoring.

### NOTES

5. [Imdb. Fen Shou Da Shi](https://www.imdb.com/title/tt3667798/)
8. [https://www.3dnetinfo.com/](https://www.3dnetinfo.com/)
Part 3

National mappings
National mapping

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The cinematography sector in Algeria is regulated by the Ministry of Culture and Arts through its different institutions and commissions. The Minister of Culture is responsible for encouraging and promoting the production and broadcast of cinematographic and audiovisual art. The Ministry of Culture and Arts carries out this mission through several public entities, including the National Center for Cinema and Audiovisual (Centre national de la cinématographie et de l’audiovisuel, CNCA), responsible for regulating cinematographic activity, to propose measures or norms to regulate the sector, to digitalize the cultural film heritage and to issue certificates related to the sale, rental and distribution of video recordings, further to an opinion from the video recording commission.

The Algerian Agency for Cultural Outreach (Agence algérienne pour le rayonnement culturel, AARC) has, for its part, the mission of promoting Algerian culture and performing arts throughout the world, as well as welcoming foreign artistic expressions into Algeria.

As well as these three structures, there is the Algerian Centre for Cinema Development (Centre Algérien de Développement du Cinéma, CADC), which is responsible for commercial, industrial, and artistic film development, and the Algerian Centre for Cinematography (Centre Algérien de la Cinématographie, CAC), tasked with researching, collecting and preserving cinematographic films and documents, managing repertory cinemas and developing film clubs.

As for the audiovisual sector, it is governed by the Algerian Audiovisual Regulatory Authority (Autorité de Régulation de l’Audiovisuel, ARAV), which regulates all audiovisual activity in Algeria, regardless of the method of broadcast, whether by terrestrial Hertzian waves, through a cable network or satellite or by any other electronic communication network.

The sector is also run by associations, such as the Algerian Association of Screenwriters (Association algérienne des scénaristes), the Collective of Technicians of Algerian Cinema (Association nationale des techniciens du cinéma et de l’audiovisuel, CTCA), the Association for Algerian Film Producers (Association des producteurs algériens du cinéma, APAC), and the artistic cinema association “Lumières”.

**COPYRIGHT PROTECTION AND PIRACY**

The establishment responsible for the protection of copyright is the National Office of Copyright and Related Rights (Office national des droits d’auteur et des droits voisins, ONDA), under the authority of the Ministry of Culture. It is a public industrial and commercial establishment. It is regulated by Order No.11-03 of 17 February 2011 on copyright and related rights as well as by executive decree 05/356 of 21/09/2005. Copyright protection is regulated by Order No. 03-05 of 19 July 2003 on copyright and related rights.

The ONDA is tasked with protecting the moral and material interests of authors and their beneficiaries, protecting traditional cultural heritage works and national works found in the public domain as well as the social protection of artists.
The ONDA works with the Algerian Directorate General for National Security (Direction Générale de la Sûreté Nationale, DGSN) and the customs services to deploy the necessary means to fight against piracy and illegal use of cultural works.14

Awareness-raising operations on the consequences of piracy and the damage it does to artistic creation and authors’ interests are regularly directed at consumers.

Producers and filmmakers estimate that the approximate percentage of income lost due to piracy is very high. This is due to several factors, such as the lack of organisation of the national cinema and audiovisual market, the insufficient regulation of the profession and the absence of a regulating body in the market, which would be responsible for monitoring cinemas, their income, and calculating statistics linked to the sector.

PRODUCTION

Algeria has a total of 1,234 production and distribution companies for audiovisual products of which are 411 film distribution companies.15 Around 40 of these companies, in particular those founded by directors, filmmakers, and producers, work specifically in the production of films,16 while the others specialize in the fields of publicity and events.

FILM

Algerian cinema was born long before the country’s independence, the National Liberation Army (Armée de libération nationale, ALN) having established a cinematographic unit in 1957. After achieving independence in the 1960s, authorities have principally tackled the structure of the sector. The 1970s were prosperous in film production before a first crisis in the 1980s, in particular due to the economic crisis linked to the fall in petrol prices. The 1990s, viewed as the dark decade, accelerated the decline in film industry.17

The decade after this was particularly marked by circumstantial activity, linked to cultural events, such as national and international festivals taking place in Algeria.

Several famous films have been filmed in Algeria, such as Tarzan the Ape Man (1932) by W.S. Van Dyke, Samson and Delilah (1949) by Cecil B. DeMille, The Battle of Algiers (La Bataille D’Alger, 1966) by Gillo Pontecorvo, Z (1969) by Costa Carvas, What the Day Owes the Night (Ce que le jour doit à la nuit, 2012) by Alexandre Arcady, Isabelle Eberhardt (1991), A View of Love (Un balcon sur la mer, 2010) and also The Assault (L’Assaut, 2011). But over the decades, Algeria has become a less and less popular film destination for foreign filmmakers due to the lack of suitable technical equipment.

However, several Algerian films, filmed in Algeria, have been globally acclaimed, from Mohammed Lakhdar-Hamina’s Chronicle of the Years of Fire (Chronique des années de braise, 1975), which won the Palme d’Or at the Cannes Film Festival in 1975, to Merzak Allouache’s Omar Gatlatour (1977) which won, among others, a prize at the Karlovy Vary International Film Festival in 1978.18
More recently, L’Oranaïs (2014) by Lyes Salem won prizes at the Angoulême Francophone Film Festival (Festival du film francophone d’Angoulême), the International Festival of Young Filmmakers of Saint Jean de Luz (Festival international des jeunes réalisateurs de Saint-Jean-de-Luz), and the Francophone Cinema Trophies (Trophées francophones du cinéma). The Blessed (Les Bienheureux, 2017) by Sofia Djama won several prizes at the Venice International Film Festival, as well as other distinctions. Papicha (2019) by Mounia Meddour won Best Arab Film at the El Gouna Film Festival and Best Debut Film and Most Promising Actress for Lyna Khoudri at the César Awards in 2020. After being released in 2019, the film Abou Leila by Amin Sidi Bourneidiène also received many awards, one of which was best European Fantasy Film at Neuchâtel International Fantastic Film Festival (Festival international du film fantastique de Neuchâtel).

In total, more than 170 films (feature-length, documentary, and short films), the majority financed by the FDATIC and the AARC, were produced between 2007 and 2013. 75% of these Algerian films have been co-produced with European countries, 11% with African countries, and 9% with Asian countries.

TELEVISION AND VIDEO

Television production is largely based on the bartering model. When a production, a show concept or a sitcom is chosen by a television channel, it then gives it a broadcast certificate or a purchase order, which is needed to request a filming permit and begin production. A contract is drawn up between the production company and the television channel and the sponsor. The latter pays the production company and profits, in exchange of advertisements or product placement on the television channel that broadcasts the programme. The broadcaster, for its part, is recompensed by the increase in its audience when the programme is broadcast. Sometimes, the sponsor pays the broadcaster who in turn pays the production company.

The production of television content increases during the month of Ramadan. It is traditional for Algerian families, after iftar (breaking the fast once the sun has set), to gather in front of the television to eat traditional dishes and watch sitcoms or serials, with some having seen resounding success and becoming part of popular culture, like Nass Mlha City (2002) and Djimagi Family (2008) from director Djaafer Gacem, or more recently Bibiche & Bibicha (2014) by Samy Faou, Sultan Achour 10 (2015) by Djaafer Gacem, Dakyous & Makyous (2018) by Nabil Asli and Nassim Haddouche, and Wled Lahlal (2019) by Nasredinne Shili.

DISTRIBUTION, EXHIBITION AND BROADCAST

DISTRIBUTION COMPANIES

There are 411 film distribution companies in Algeria. In order to work in this field, they must obtain authorization from the Ministry of Culture and the Arts.

CINEMA EXHIBITION

At the time of independence, Algeria had 450 cinemas throughout the country. The majority of its cinemas are under the authority of the Ministry of the Interior, and belong to the Assemblées Populaires Communales (communes), due to their local nature. The Ministry of Culture and Arts has 81 screens under its supervision, among which only 25 screens show films. The communes have more than 251 other cinemas under their supervision, the majority of which are unused or dilapidated.

Amongst the cinemas owned by the Ministry of Culture and the Arts, there are 13 active theatres in the Algerian Cinemathèque (Cinémathèque Algérienne), managed by the Algerian Centre for Cinematography (Centre Algérien de la Cinématographie). These cinemas give priority to screening local films.

There are also private cinemas. Three businesses operate film theatres.

La Fourmi, Gold Vision, and the Murdjafo cinema in Oran, and the Cosmos and Zinet in Algiers. A multiplex in Oran will soon open, while an identical project has been launched in Algiers. These private cinemas above all show foreign films, either European or American.

BROADCAST

The Algerian televisual market is characterised by a strong market penetration of television sets in homes, a figure which has exceeded 96% for more than 20 years. Pay television offers struggle to emerge in a market affected by the rise in piracy and marked by the dominance of free-to-air (FTA) satellite television, an access used by 90% of households. The coverage rate of DTT (digital terrestrial television) reached 77.16% at the end of 2020, according to TéléDiffusion d’Algérie (TDA), which operates seven satellites: Alcomsat-1, E7WA, Hotbird, SES4, SES Astra, Intelsat Galexy 19 and Arabsat Badr6.

There are eight public television channels: Programme national, A3, Canal Algérie (Francophone), TV 4 (Tamazight), TV 5 (Quran), TV 6 (general, family), TV7 (Maarifa - education) & TV8 (history). The Algerian audiovisual scene also has private channels, the most watched of which are Ennahar TV (general), Echorouk TV (general), El Bilad (general), El Hayat (general), Berbère Télévision (general, tamazight), El Djazairia One (general), Beur TV (general), and Lina TV (general). El Adjwaa, Numidia TV and El Fadjir, and specialized channels like El Haddaf (sport) and Samira TV (cookery), have smaller audiences.

Pan-Arab players account for the bulk of free and paying markets, as broadcast signals continue to be distributed in the region by satellite. The leaders of pay television in 2019 were premium players beIN and OSN.

DIGITAL PLATFORMS

The number of internet subscriptions stood at 42.55 million at the end of 2020, 3.7 million of which are on a fixed internet network.
The streaming platforms Netflix and Amazon Prime are available in Algeria. If Netflix is gaining popularity in Algeria, the figures concerning the number of Algerian subscriptions are not available as many Algerians subscribe through relatives or offshore bank accounts.

Local on-demand video services have emerged, like the application MagMovie that offers films and series without a subscription; YARA, founded by the startup YA Technologies; and CHACHA, launched in partnership with the Algerian Centre for Cinema Development (Centre Algérien de Développement du Cinéma, CADC).

Other on-demand video services are available from mobile phone operators, like STARZPLAY from the operator Ooredoo or Djezzy App, the official application of the operator Djezzy, which includes video content. The third operator, Mobilis, launched its own service V-View in 2017.

FUNDING SOURCES AND MECHANISMS

The FDATIC provides several types of financial assistance, including, for production, distribution and equipment. The FDATIC has set up a reading commission whose mission is to read and validate script projects that have been submitted.

Moreover, establishments like the CADC and the ONDA also fund productions in various ways (co-productions, bursaries, and workshops).

Foreign cultural institutes also propose funding programmes through calls for film projects launched by the French Institute of Algeria (Institut Français d’Algérie), the Embassy of the United States through its Alumni programme, or the German Embassy through the Goethe Institute, amongst others.

Finally, some films, short films, serials and sitcoms are sometimes financed by brands and private industrial companies through sponsoring or product placement.

PROMOTION

There are numerous local, national and international festivals and cultural events organised regularly in Algeria to promote Algerian and international productions, like the Oran International Arabic Film Festival (Festival international du cinéma d’Oran), the Algiers International Film Festival (Festival international du cinéma d’Alger, FICA), the Annaba Mediterranean Film Festival (Festival d’Annaba du Film Méditerranéen), the Annaba Short-Film Festival (Festival d’Annaba du Court-Métrage), the Rencontres Cinématographiques de Béjaia (RCB), the National Cultural Festival for Women in Literature and Cinema (Festival national de la littérature et du cinéma féminins) and the Festival du Film Engagé d’Alger.

EDUCATION AND TRAINING

Some public and private establishments provide short training programmes and diploma-based courses.

The Higher Institute of Performing Arts and Audio Visual (Institut Supérieur des Métiers des Arts du Spectacle, ISMAS) teaches several specialities (direction, sound, camerawork, script editing) to several year groups from 12 to 15 students. The National Higher Institute of Vocational Training in Audiovisual (Institut National Supérieur de la Formation Professionnelle en Audiovisuel) teaches photography, sound, image, screening techniques and audiovisual equipment maintenance and web development. The Film Institute (Institut Cinéma) is a school specialized in professions in the audiovisual industry, cinema and administration, which offers training linked to direction, design, sound engineering, production, scriptwriting and performance.

As for university programmes, Mostaganem University (Université de Mostaganem) runs a Masters degree in documentary cinema, and Algiers University (Université d’Alger) offers a Masters course in audiovisual training. Various private schools also offer short training courses, like Oxygène Académie, which teaches direction, video editing, make-up, TV animation, animation, and infographics.

There are also workshops, residencies, and training programmes run by associations, NGOs, cultural centres, and the authorities.
NOTE


18. Ministry of Culture, Historique, Récipients:


25. Sidjilicom, Centre national de registre de commerce (CNRC), sidjilicom.cnrc.dz


28. Sidjilicom, National Centre of the Trade Register Portal, sidjilicom.cnrc.dz


32. TÉ Diffusion d’Algérie (TDA), Diffusion Satellitaire, https://www.tda.dz/fr/DiffusionSat

33. ARPE, Market Indicators, Observatoire Internet, https://www.arpe.dz/fr/page/statadsl

34. MagMovie, https://magmovie.net/fr/welcome

35. Yara, https://www.m-culture.gov.dz


ANGOLA

Population: **44.8 million**
GDP per capita: **US$ 6,654**
Median age: **16.7 years**
Urban population: **66.2%**
Rural population with access to electricity: not available
Mobile phone subscription: **43.1%**
Internet users: **14.3%**
Female upper secondary education completion rate: not available


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The Angolan Film Institute (IAC) and the National Film Laboratory (LNC), created in 1977, are responsible for regulating the film industry and producing content for the government, in addition to archiving the collection of films produced after independence. In 2003, these institutions became part of the Angolan Institute of Cinema, Audiovisual and Multimedia (IACAM), under the supervision of the Ministry of Culture, which manages and represents the film industry in Angola.

In 2016, the Secretary of State for Cultural and Creative Industries was set up with the mission of creating a favourable framework for the creation, promotion and dissemination of the arts.

The television sector is under the supervision of the Ministry of Communication. The Angolan Regulatory Body for Social Communication (ERCA) is an independent administrative entity, responsible for regulation and supervision of the media in accordance with the provisions of the Constitution and the law.

FILM AND AUDIOVISUAL POLICY

The Law on Cinema and Audiovisual, adopted in 2012, regulates the promotion, development and protection of the film and audiovisual industry.

The law (Chapter II-Section 1 - Article 8.1) provides, inter alia, for the adoption by the State of measures to encourage investment aimed at the development, production, co-production, promotion and national and international dissemination of film and audiovisual works. Article 8.2 also states that the State shall create conditions for the promotion and development of national entrepreneurship and encourage foreign investment in the film and audiovisual sector.

COPYRIGHT PROTECTION AND PIRACY

The Angolan Institute of Cinema, Audiovisual and Multimedia (IACAM) estimates that losses of earnings due to piracy amount to between 50 and 75%. The stakeholders contacted confirmed this estimate for the music industry, but were unable to provide figures for the film and audiovisual industry. On the one hand considering piracy to be above all a problem concerning Hollywood content, but, on the other hand, expressing concern about the inability to supervise the very dynamic activity in the informal sector of the economy.

The creation of the National Service for Copyright and Related Rights (SENADIAC) in 2019 enabled to initiate the process of regulating copyright registration. The foundations have been laid for a national copyright system with the creation of two collecting organisations, both members of the International Confederation of Societies of Authors and Composers (CISAC).

The Angolan Copyright Society (SADIA) is a company governed by the law of associations, responsible for the management of copyright in accordance with the terms of national and international law. The National Union of Artists and Composers (UNAC), which already provided protection for the Union’s member associates, is above all dedicated to the music industry, while extending the possibilities of collecting royalties to all fields of artistic creation.

PRODUCTION

The IACAM indicates the existence of about thirty registered and economically active production companies, with an estimated 150 direct jobs and around 900 indirect jobs.

FILM

Film production in Angola has passed through several stages, reflecting the political and social changes of the country. The film *O Caminho de ferro de Benguela* (1913) by Arthur Pereira was the first Angolan film. At the end of the 1940s, many documentaries were produced, very much focused on the “exoticism” of the landscapes, customs and cultures of the peoples, as well as on the track record of growth and development of the Portuguese colonial empire in Africa.

The first feature film was *O Feitiço do Império* (1940), by António Lopes Ribeiro. In the course of the 1950s and 1960s, documentaries were produced under the supervision of the Army Cartographic Service, the Angola Information and Tourism Centre (CITA), Telecine-Moro and Cinangola Filmes.

In the 1980s, a period that corresponds to the worsening of the civil war and the disengagement of the State, deterioration of the infrastructure and the absence of an incentive policy led to a cessation of Angolan cinema. However, some films were made, such as *Caravana* (1990) by the Cuban directors Rogelio París and Julio César Rodríguez, and *O Miradouro da Lua* (1992) by Portuguese-Angolan director Jorge António.


More recently, there has been a revival of Angolan cinema, which is now breaking the relationship between filmmaking and political power and exploring the tragedies of the suburbs and Angolans’ lives. Certain Angolan films are beginning to gain international recognition, such as *Independência* (2016) by Fradique, *O Outro Lado do Mundo* (2016) by Sergio Afonso, *Beyond my Steps* (2019, *Para Lá dos Meus Passos*) by Kammy Lara and, above all, *Air Conditioner* (2020, *Ar Condicionado*) by Fradique and Jorge Cohen, which was selected for the Rotterdam Film Festival. The private sector company Semba Comunicação also produced *Moments of Glória* (2008) and *Bambaraology* (2016) by Coreón Dú, *Festa do quintal* (2012) and *Ganhos da Paz* (2014) by Jorge Pelicano, *Jinga, Rainha de Angola* (2013) by Sérgio Graciano and *I Love Kuduro* (2014) by Mário Patrocínio. The music video director Hochi Fu of the Power House company has also directed two feature films: *Sexta-Feira Mwangolé* (2018) and *2 Mundos* (2020). Moreover, the advent of digital equipment has enabled a new generation to develop their films at reduced cost and without a complex production organisation. This prolific production is strongly influenced by American action films and Nollywood. The films are screened in improvised venues and encounter great success with audiences. Among the most popular of these films are *Assaltos in Luanda 1 and 2* (2006/2009) by Henrique Narciso Dito, *A Zunquêira* by Dorivaldo Fernandes (2007), *A Última Squad* (2008) by Higino dos Santos, and *A Única Filha* by Biju Garzin (2013). This new industry has enabled the creation of a body of independent producers and directors capable of making commercial works that fuel more accomplished projects for cinema and television.

The Angolan Institute of Cinema and Audiovisual (IACA) registered 167 fictional and documentary films produced between 1971 and 2018.

**TELEVISION AND VIDEO**

The market for institutional, corporate, event and music videos is currently growing. Suppliers of these services are demonstrating very innovative marketing techniques. Entertainment and fictional programmes have expanded in a very dynamic manner since 2018, with notable export results in certain cases.
Conversas de Quintal has been a very popular comedy series on Public Televisión of Angola (Televisão Pública de Angola, TPA) for over ten years. The majority of the actors and actresses belong to theatre groups of social importance in Angola. The Bounce de Semba Comunicação dance competition was held over four seasons and allowed the dance to spread throughout the country.

Semba Comunicação has established itself as a leading production company in the telenovela sector, producing, in particular, Voo Directo, the first telenovela co-produced by Semba Comunicação and the Portuguese channel RTP, Abre o Olho, and above all Windeck, which has been broadcast in Angola since 2012 and in Portugal on RTP1 in 2013. Since then, Windeck has also been broadcast in France, Mozambique, Nigeria, Ghana, Côte d'Ivoire, Brazil, Canada, Cabo Verde and the United Kingdom, and continues to be sold in a number of territories in Africa and around the world. Windeck has received extraordinary recognition from audiences and critics, and was nominated for Best Telenovela at the 2013 International Emmy Award for Best Telenovela.

Its experience in telenovela production led Semba Comunicação to provide its services for the production of Brazilian telenovelas such as Terra Prometida shot in the Namibian desert in 2016 for the Brazilian Record group, as well as Mister Brau, starring the Brazilian celebrities Lazaro Ramos and Tais Araujo, for Globo in 2018.

DISTRIBUTION, EXHIBITION AND BROADCAST

DISTRIBUTION COMPANIES

Film distribution in Angola is organised by the Portuguese and Brazilian telecommunications companies NOS/ZAP Cinemax, Cinemax and Cineplace, which provide the Portuguese versions of locally-distributed films.

CINEMA EXHIBITION

The cinema projection sector has undergone remarkable expansion in recent years, after many years of stagnation and conversion of cinemas for other uses. Today there are 44 commercially-active screens in the country as a whole, the vast majority of which show Hollywood films. These screens are located in Luanda, but also in the cities of Benguela, Huambo and Lubango. A study conducted in 2019 by Marketest indicates that 20% of the population of Luanda said that it had visited a cinema at least once in the past year.

BROADCAST

Television viewing has gradually increased ANGOLA, reaching 54% of households in 2019. A survey conducted in 2019 indicates that 98% of Luanda’s inhabitants watch television on a regular basis. Free-to-air television (FTA) is still broadcast using analogue signals, and only a minority of FTA households are connected to satellite reception.

The Angolan public broadcaster Televisão Pública de Angola operates three channels (TPA1, TPA 2 and TPA International). Until very recently, there were five private channels in the country. There has been a state monopoly in the sector for 33 years. The first private broadcaster authorised to operate, TV Zimbo, started broadcasting in 2008. The channel belongs to the MediaNova group, which also owns Rádio Mais and the weekly newspaper O País. The Zimbo TV channel and Palanca TV have recently passed under the provisional supervision of the State, within the framework of the process of recovery of private assets financed by public funds.

Pay television services have grown steadily over the past ten years and represented more than 50% of television households in 2019. The dominant telecommunications company ZAP, 30% of which is owned by the Portuguese telecommunications company NOS, reported 1.82 million subscribers in 2020. The pay television market is marked by the predominance of direct-to-home (DTH) satellite reception and the leadership of local actor ZAP. The South African DStv is also active in Angola.

DIGITAL PLATFORMS

The Angolan Institute of Telecommunications (INACOM), which oversees the telecommunications sector, reports ten million users for the Unitel network as compared with 3.7 million for the competing Movitel network. The principal internet service providers are TVCabo, Zap Fibra, UNITEL, Angola Telecom and NetOne. Internet users are estimated at 6 million, 3.5 million of whom access internet via smartphones.

The Angolan VOD market remains small in volume and value terms. The biggest local VOD platforms are Plataforma de filmes Tellas, NOS Lusomundo audiovisuais and the VOD Group. The SVOD market is dominated by Showmax, whose services are available to subscribers of the pay television telecommunications company DStv.

The SVOD market is dominated by Showmax, whose services are available to subscribers of the pay television telecommunications company DStv. Netflix and Trace Play (Trace TV) constitute the challengers.

FUNDING SOURCES AND MECHANISMS

The Law on Cinema and Audiovisual adopted in 2012 provides for the State to finance incentive measures and support for the development of the film and audiovisual sectors. The law also states that financing of the film and audiovisual sector shall be provided by television companies, distributors of film and audiovisual productions, providers of on-demand audiovisual services and electronic communications companies, and by investments by cinema operators.

One of the principal sources of funding provided for the development of the film and audiovisual sector is the Film and Audiovisual Development Fund (FDCA), which is funded by the state budget, through taxes levied on exhibition and distribution, video rental and sales, and taxes on the broadcasting of advertising products by television stations.
As elsewhere in Africa, Angolan filmmakers are exploring the various financial support systems available, for which their eligibility is not a problem, particularly in Portugal, France and the EU.

PROMOTION

The Luanda International Film Festival (FIC Luanda), created and managed since 2006 by the IACAM is the most outstanding initiative in this field. Unfortunately, everything seems to indicate that this festival has not been held for several years. Note should also be taken of the more recent creation of the Kianda International Short Film Festival "FESC KIANDA". 25

In addition, other venues regularly organise film-related events. The Cultural Centres of Portugal and Brazil, for example, provide a varied programme in which cinema is a regular feature. The Palácio de Ferro, a historical building, has a projection room. The Goethe-Institut has carried out promotional activities for a university audience through the organisation of the Cinema no Telhado programme. 26 In 2019, the Geração 80 collective, on the occasion of the launch of the film Para Lá Dos Meus Passos by Kammy Lara, took over of online debates with filmmakers from Angola and other lusophone countries 28 , as well as film screenings known as Cinema Yetu. 29

EDUCATION AND TRAINING

The Independent University of Angola (UNIA) has provided a four-year higher educational course in Communication Studies since 2012, with an audiovisual and film component in the final year. 30 The International Higher Polytectnic Institute of Angola (ISIA) also provides a higher educational course in Corporate Communication and Image, which is more focused on advertising and marketing. 31

Other institutions such as the Center of Audiovisual and Multimedia Training (FILSAMÁ) 32 , the Angolan Association of Cinema and Audiovisual Professionals (APROCIMA) 33 , the Goethe-Institut Angola 34 and the school Procinema 35 run short courses in production, scriptwriting, directing and editing. The television channels TPA and Zimbo also offer various in-house training courses to their staff, which contribute to increasing the skills of many industry professionals.

Angolans also take part in the Multichoice Talent Factory in Lusaka, Zambia, which provides a 12-month multi-sectoral training course. Lastly, a few filmmakers have taken part in training initiatives provided by the DocTV - CPLP programme. 36

The industry professionals contacted consider that available training is insufficient for the country’s needs and that there is a prevalence of theoretical aspects over the practical aspects of professional occupations.

NOTES

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Part 3 • National mappings
**MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS**

The film sector is under the supervision of the Ministry of Culture, which oversees the industry via the National Cinema and Moving Picture Centre (Centre national du cinéma et de l’image animée, CNCIA). The audiovisual sector is linked to the High Authority for Audiovisual and Communications (Haute Autorité de l’Audiovisuel et de la Communication, HAAC) and the Support Fund to Audiovisual Production (Fonds d’Aide à la Production Artistique, FAPA), linked to the Ministry of Communication. The first is the regulatory body for the audiovisual and communications sector in Benin, and the second a support fund for production.

The exact number of trade associations registered with the CNCIA. However, we can note the National Federation of Cinema and Audiovisual Associations of Benin (Fédération Nationale des Associations du Cinéma et de l’Audiovisuel du Bénin, FENACAB), the Beninese Federation of Theatre and Film Actors (Fédération Béninoise des Acteurs du Théâtre et du Cinéma, FEBATCI) and the National Federation of Yoruba Cinema and Dramatic Arts of Benin (Fédération Nationale des Praticiens du Cinéma et l’Art Dramatique Yorouba du Bénin, FENAPCADY).

**PRODUCTION**

**FILM**

The first film recognised in Benin was *Under the Sign of Voodoo* produced by Pascal Abikanlou in 1974. Several quality films and series were produced during this period, and were met with popular success such as *Le Nouveau venu* (1976) by Richard De Medeiros and *Ironu* (1985) by François Sourou Okioh. A new generation of filmmakers emerged in the 90s including Jean Odoutan, Sylvestre Amoussu and Idrissou Mora Kpai. Among the films directed by Jean Odoutan in Benin, we can cite *Barbecue Pojo* (1999) and *Pim-Pim Tché* (Toast de vie) (2009). Sylvestre Amoussou is the author of three successful feature films, including *l’Orange africain*, awarded with the Silver Yennenga at FESPACO 2017. The short fiction films of Ange-Régis Hounkpatin and the documentaries of Idrissou Mora Kpai and Faissol Gnonlonfin have also been selected for international festivals.

In 2006, the creation of the Higher Institute of Audiovisual Training (Institut Supérieur des Métiers de l’Audiovisuel, ISMA), a private institution, gave Beninese cinema a new push. A large number of young people are being trained, resulting in the production of around thirty short films per year. This new wave of filmmakers are gathering attention and winning prizes in Benin and internationally. For example, Jaurès Koukemberdji won best fiction film in the schools category at FESPACO 2019 and Kismath Baguiri won the Prix du Public at the 2020 edition of the Vue d’Afrique festival in Montreal.

In recent year, Benin has also attracted international productions. In 2011, for example, the Argentinian Pablo César chose Benin for his feature film *Shores*. In 2019, actress Lupita Nyong’o shot the documentary *Meets Real Warrior Women* followed in 2020 by the Spanish director Salvador Calvo who filmed *Adú* with a six-year old Beninese boy as the lead actor, and in 2021, the Nigerian C. J. Obasi shot his feature film *Mami Wata* in the country.

**COPYRIGHT PROTECTION AND PIRACY**

Copyright is handled by the Beninese Copyright Office (Bureau Béninois du Droit d’Auteur et des Droits Voisins, BUBEDRA). Very few filmmakers are, however, registered with this office.

The effective protection of copyright and the fight against piracy in the context of the digital environment remains a challenge. Legislation does, however, offer the possibility of obtaining orders of the president of the commercial court for the suspension of sites that pirate cinematographic works.

**INSTITUTIONAL FRAMEWORK**

**REGULATORY INSTITUTIONS**

- **Regional Cinema Committee**
- **High Authority for Audiovisual and Communications (HAAC)**
- **Support Fund to Audiovisual Production (Fonds d’Aide à la Production Artistique, FAPA)**
- **Support Fund for Documentary Research (Fonds d’Aide à la Recherche Documentaire, FGAR)**
- **Support Fund for Television and Radio (Fonds d’Aide à la Télévision et à la Radio, FAETR)**

**INDUSTRIAL FRAMEWORK**

- **Cinéma et de l’image animée, CNCIA)**
- **National Cinema and Audiovisual Associations of Benin (Fédération Nationale des Associations du Cinéma et de l’Audiovisuel du Bénin, FENACAB)**
- **National Federation of Yoruba Cinema and Dramatic Arts of Benin (Fédération Nationale des Praticiens du Cinéma et l’Art Dramatique Yorouba du Bénin, FENAPCADY)**

**Source:** UNDP Global Human Development Indicators 2019 and UNESCO Education Global Monitoring Report 2020.

This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.
TELEVISION AND VIDEO

Up until 2018, the National Television Channel of Benin (ORTB) had mainly operated on a bartering system with the national producers. Filmmakers handed over the broadcasting rights of their productions to the ORTB for airtime that they could then sell to advertisers. In 2019, following the advocacy activities of young filmmakers, the national television channel set aside a budget to buy the pay for the broadcasting rights of Beninese films. Nowadays, it buys some twenty films per year at around US$10 per minute. The country’s private television channels (Canal3, Eden TV, Golf TV, TVC) do not have an allocated budget to co-produce and/or to buy local productions.

DISTRIBUTION, EXHIBITION AND BROADCAST

CINEMA EXHIBITION

The first cinema theatres were built in 1960, following independence, then declined in the 90s with the emergence of video rental shops. These outlets primarily acted as relays for Nollywood and Bollywood productions. Benin now only has one working cinema theatre: the Canal Olympia, owned by the Bolloré group. This cinema, located in Cotonou, the economic capital, mainly shows American and French blockbusters and a few African films. There are also some small cinemas like at the Institut Français and those at some cultural centres that host screenings.

BROADCAST

Television viewing has gradually increased in Benin, reaching 40% of households in 2019. Most households still receive free-to-air (FTA) channels, with the most common access being terrestrial television. Conversion to digital terrestrial television (DTT) began a few years ago and should be completed in 2021. A recent acceleration has been seen in terms of the deployment and adoption of infrastructures, but also with the creation of the company Bénin Diffusion, a structure responsible for broadcasting digital terrestrial television programmes. The pay TV sector is dominated by the operator Canal +.

DIGITAL PLATFORMS

The video on demand market in Benin remains extremely small in volume and in value. Very few Beninese have access to Netflix. There is a local streaming platform called Claxic Media but it is struggling to take off due to the size of the market and the insufficient internet connection quality.

FUNDING SOURCES AND MECHANISMS

There is no operational public funding programme that specifically targets the film and audiovisual industry. The Support Fund for Culture (Fond d'Aide à la Culture, FAC) is intended for all cultural sectors. According to industry professionals consulted, this funding is largely insufficient, which causes many filmmakers not to consider the FAC in their funding plans. The Support Fund to Audiovisual Production (Fonds d’Aide à la Production Audiovisuelle, FAPA) is in place since 2007. It is also possible, in some cases, to obtain loans from private investors, sponsorship from brands and commissions from broadcasters. Other funding for audiovisual projects can sometimes come from embassies, NGOs and international organisations. This funding is generally directed towards institutional films for various awareness-raising programmes.

EDUCATION AND TRAINING

The National Institute of Art, Archaeology and Culture at the University of Abomey Calavi (Institut National des Métiers d’Art, d’Archéologie et de la Culture, INMAC) and the National School of Technology, Information and Communication Sciences offer bachelor and master level degrees in cinema production and techniques (sound and image).

Private schools like the Higher Institute of Audiovisual Training (Institut Supérieur des Métiers de l’Audiovisuel, ISMA), the Higher Institute of Fine Arts and Communication (Institut Supérieur des Beaux-Arts et de la Communication, ISBAC) and the Vocational Training Centre for National Television run also programmes in cinema techniques, screenplay and production.

NOTES

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5. https://www.gouv.bj/actualite/509/films Hispano-beninois d’une production cinématographique qui revèle le splendeur et le talent beninois
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THE AFRICAN FILM INDUSTRY • Trends, Challenges and Opportunities for Growth

**BOTSWANA**

| **Population:** | 2.8 million |
| **GDP per capita:** | US$ 17,766 |
| **Median age:** | 24 years |
| **Urban population:** | 70.2% |
| **Rural population with access to electricity:** | 27.9% |
| **Mobile phone subscription:** | 150% |
| **Internet users:** | 150% |
| **Female upper secondary education completion rate:** | not available |


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

**INSTITUTIONAL FRAMEWORK**

**MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS**

The Botswana Film Office is currently housed within the Botswana Ministry of Presidential Affairs and Public Administration under the Department of Broadcasting Services. The Ministry of Youth Empowerment, Sport and Culture Development (MYSC) is also a major player where in 2018, is spearheaded the national consultations for the review and update of the Cinematograph Act as well as the establishment of a Film Commission. Established in 1970, the Cinematograph Act regulates the making and exhibition of films and the licensing of cinemas in Botswana. In May 2020, the Ministry of Youth Empowerment, Sport and Culture Development conducted an industry consultation on the development of the National Arts Council of Botswana Bill, which was successfully presented to the parliament.

The Botswana Communications Regulatory Authority (BOCRA) regulates the broadcast sector with 3 main broadcasting houses, Botswana National Television (BTV), e-Botswana TV and Now TV.

**FILM AND AUDIOVISUAL POLICY**

In the absence of a Film Commission, Botswana lacks a dedicated department and specific mechanisms to promote Botswana as a potential film location or to facilitate foreign shoots. Besides local content quotas regulations for broadcast, Botswana does not provide incentives for the private sector to invest in local content.

However, the Levy on Technical Devices Fund (LTDF) launched by the Companies and Intellectual Property Authority (CIPA) can provide one model for the financing of the film and audiovisual sector on which the industry as a whole could expand. LTDF LEVY is collected by the Botswana Unified Revenue Service (BURS) and deposited in the Levy on Technical Devices Fund, which was established by the Ministry of Finance and Development Planning through Statutory Instrument No. 94 of 2008.

The Fund is administered by the Levy on Technical Devices Fund Committee appointed by the Permanent Secretary in the Ministry of Trade and Industry who is the Accounting Office for the Fund. It assists with the development of capacity building, equality and diversity of the creative industries.

**COPYRIGHT PROTECTION AND PIRACY**

Copyright protection is ruled by the Copyright and Neighbouring Rights Act, of 2000 (amended in 2005), and overseen by CIPA. Practitioners estimate that 60% of revenue, is lost from the illegal sharing and sale of creative content. In November 2011, the Copyright Society of Botswana (COSBOTS) was commissioned and became operational as a collective management organization to monitor usage of works – License Users – Collect royalties from Users and – Pay royalties to Rights holders.

COSBOTS also administers the rights of all protected works to include literary, audiovisual and other artistic works exploited for commercial purposes.

Section 36A of the Copyright and Neighbouring Rights Act established the Copyright Society of Botswana (COSBOTS) as a non-profit collective management organization. It represents various categories of works protected under the Copyright and Neighbouring Rights Act CAP, negotiates and grants licenses for use of works in all scopes be it musical, literary, etc., sets rates of royalties in accordance with international standards and collects royalties on behalf of right-holders.

**PRODUCTION**

The estimated number of active production companies in Botswana is about 266. Experts also estimate that revenue generated from film sales totals around US$5,5 millions annually. The industry created about 2,000 directed and 1,800 indirect jobs.

**FILM**

Botswana distinguishes itself as a prime wildlife documentary destination, mostly around the regions of Maun and Chobe in the north. Well known wildlife film locations include the Okavango Delta, the Kalahari Desert, as well as the country’s various cultural villages, national parks and game reserves.

Today, major wildlife documentaries continue to be shot in Botswana, such as Okavango: River of Dreams, by South Africa-born and Botswana-based Dereck and Beverly Joubert, which was the first film from Botswana to screen at the Sundance Film festival in 2020.
Botswana has also served as a film location for a few high-profile international productions, such as the major international hit comedy *The Gods Must Be Crazy* (1981), Disney's *Whispers: An Elephant's Tale* (2000), and Anthony Minghella’s HBO TV series *The No. 1 Ladies' Detective Agency* (2007). This last project had the benefit of providing temporary but valuable experience to a large number of local film technicians and assistants. Botswana also contributed US$5 million,² to the production’s US$40 million budget. More recently in 2016, the British film *A United Kingdom* was also shot in the country.

These Hollywood experiences, as well as the growing influence of Nollywood in the country, has ignited young Batwanas’ desire to create movies that reflect their own local culture.³ In the mid to late 2000s, low-budget locally-produced movies such as *Rra Dijo*, *Chobolo*, *Ramo's Flash* and Moabi Mogorisi's *Hot Chilies* were released on DVD and their popularity highlighted the strong demand for local content. However, the once-promising local DVD market has all but collapsed with the advent of streaming, and a sustainable business model for local films remains elusive. In consequence, the Batswana film sector has stayed very small.

**TELEVISION AND VIDEO**

In the absence of a structured financing, distribution, and monetization system for film, a handful of these production companies compete over a limited number of high budget commercial or corporate projects, while the others survive by producing small corporate or wedding videos and by responding to tenders from the public television channel BTV.

Through an average of 8 calls for proposals per year, BTV is responsible for the production of an estimated 100 hours of local creative content annually, but its financing is constrained by the size of the Botswana economy. The three private TV stations that also operate in Botswana - Access TV, Kudura TV and YTV (former e-Botswana) - do not have sufficient resources to commission content but are able to enter into co-production partnerships with filmmakers by providing equipment and studio facilities and agreeing on an advertising revenue share. Outside of these particular agreements, the Batswana TV sector still operates on the barter model, which means that filmmakers who want to show their content on air are forced to purchase airtime from broadcasters, which they then have to sell to advertisers to cover their costs and hopefully make a small profit.

**DISTRIBUTION, EXHIBITION AND BROADCAST**

**CINEMA EXHIBITION**

Botswana’s capital Gaborone counts 5 cinemas, including New Capitol cinemas and Gaborone Cine Centre, for a total of 23 screens.⁵ New Capitol Cinemas have made some efforts to support and develop local filmmaking talent,⁶ by organizing workshops with regional filmmakers, such as the cast and crew of the award-winning film, *Thina Sobaili*,¹¹ providing screening opportunities for local movies under their Home Grown banner, and supporting The 48 Hour Film Project,¹² a global short film competition.

However, practitioners estimate that the average market share of local films released in cinemas in the country is at less than 10% due to lack of production opportunities and expertise.

**BROADCAST**

TV penetration reached 64% of households in 2019.¹³ Most people still only receive free-to-air (FTA) channels through satellite or terrestrial reception. The digital migration that started in 2016 and is still ongoing.

Botswana TV, or BTV, is the country’s national broadcaster. BTV aims to carry at least 60% local content but has been limited due to insufficient small budget. In 2018, the country launched a second state television channel called Now TV, to complement BTV and focus on youth issues, with an initial local content budget of US$923,577.¹⁴ Botswana also counts three private channels: Access TV, Kudura TV, and YTV. When it comes to Pay-TV, MultiChoice’s direct-to-home (DTH) satellite service DStv is the only player in the country.
DIGITAL PLATFORMS

The Botswana video and OTT market remains exceedingly small in volume and value. The SVOD market is dominated by Showmax (MultiChoice) whose offer is available free of charge to Dtsv pay TV subscribers and for a fee to non-pay TV subscribers. Netflix and Apple TV+ are also available in the country. Recently, local telecommunications providers BoFiNet and Mascom have both launched VOD services, respectively called UPICtv and MyPlay. However, creating a viable business model for local streaming platforms in Botswana remains challenging due to the size of the market. It was estimated that there are 200,000 Pay TV and VOD subscribers in Botswana.

FUNDING SOURCES AND MECHANISMS

Botswana does not have a public funding scheme that specifically targets the film and audiovisual industry. However, CIPA (the Companies and Intellectual Property Authority) does offer grants of US$928 to US$92,837 funded through the Levy on Technical Devices Fund (LTDF) for creative and performing arts projects, for which filmmakers can apply.

Other funding for audiovisual projects can sporadically come from NGOs or development organizations such as the National Aids Coordinating Agency (NACA), which financed a 13 episodes series on HIV-AIDS for example.

It can also come from tenders from public television channel BTV; calls for proposals from sponsors such as First National Bank Botswana; or internet operators such as BoFiNet or Mascom, which has been acquiring content for its new VOD service MyPlay. However, according to practitioners, funding is largely insufficient, unpredictable, and takes too long for producers to chase and unlock, preventing filmmakers from consistently practicing their craft and stalling the growth of the sector.

PROMOTION

The Botswana Film Festival is the sole film festival in the country, but is interrupted owing to the Covid-19 restrictions.

EDUCATION AND TRAINING

In Botswana, institutions such as the University of Botswana’s Media Studies department, the Gaborone branch of the private Malaysian institution Limkokwing University College of Creative Technology, and the Arts Without Limits (AWIL) College, offer film-related undergraduate programmes. However, industry practitioners report that these programmes lack a strong practical component.

NOTES

2. Bocra: https://www.bocra.org.bw/
3. Companies and Intellectual Property Authority: https://www.cipa.co.bw/levyontechnicaldevicesfund
5. Cosbots: https://cosbots.com/
15. UPICtv: https://upictv.co.bw/
BURKINA FASO

Population: 27.4 million
GDP per capita: US$ 2,190
Median age: 17.6 years
Urban population: 30%
Rural population with access to electricity: not available
Mobile phone subscription: 97.9%
Internet users: 16%
Female upper secondary education completion rate: 2%


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The film sector is regulated by the Directorate-General for the Film and Audiovisual Industry (Direction Générale du Cinéma et de l’Audiovisuel, DGCA), the Ministry of Culture, Arts and Tourism (Ministère de la Culture, des Arts et du tourisme), and the High Council for Communication (Conseil supérieur de la Communication). The DGCA, created in 2019, is an organization created to bring together ten member organizations. The Burkinabé Union of Private Television Service Publishers (Union Burkinabè des éditeurs privés de services de télévision, UBESTV) groups together private television channels.

FILM AND AUDIOVISUAL POLICY

Burkina Faso’s film policy is compiled in a compendium entitled *Regulatory Texts on the Film and Audiovisual Industry* (Textes réglementaires sur le cinéma et l’audiovisuel), published in 2013 by the Ministry of Culture, Arts, and Tourism (Ministère de la Culture, des Arts et du Tourisme). These texts assert the State’s commitment to development of the film and audiovisual industry, indicate the support mechanisms for the sector and regulate various operational aspects.

Since 1969, the State provides extensive support for the Pan-African Film and Television Festival of Ouagadougou (Festival panafricain de l’audiovisuel et du cinéma de Ouagadougou, FESPACO). It provides around two-thirds of the budget and maintains a team of around fifty people in order to organize the event as well as the International African Film Market (Marché international du cinéma africain, MICA).

COPYRIGHT PROTECTION AND PIRACY

The purpose of the Burkinabé Copyright Office (Bureau Burkinabè du Droit d’Auteur, BBDA) is the collective management of copyright and related rights, and the protection of expressions of cultural heritage pertaining to national heritage. It manages the interests of foreign professional collective management bodies in the country within the framework of established agreements. The DGCA estimates that between 25 and 50% of earnings are lost due to piracy.

PRODUCTION

The DGCA estimates that the sector generates earnings up to the amount of US$2 million, 2,000 direct jobs and 6,000 indirect jobs. Around 30 active production companies are listed.

FILM


The 2000s saw the development of a new low-budget production economy intended to be profitable on the national market. Dozens of films are produced each year on this model. A total of 40 local films and 28 foreign films (including all genres and formats) are produced on average per year in Burkina Faso according to the DGCA.

TELEVISION AND VIDEO

The increasing access to low-cost technologies in recent years has contributed to the development of small organizations providing film and editing services for a market with a high demand for corporate and event content, music videos and commercials. This market segment is not quantifiable, but greatly contributes to job creation for young people.

For years, Radio Télévision du Burkina (RTB), the main public broadcasting organization, produced *Identité culturelle*, a series of 26-minute documentaries on Burkinabé cultures.
It also produces the cult series *Affaires publiques*, which is in its 4th season.

The practice of bartering or “exchange of goods” with television channels is common. It usually consists of filmmakers and producers giving up the rights to films to a broadcaster in exchange for airtime to be cashed out to advertisers as compensation. TV channels mention the absence of financial resources for the purchase of local content.

Despite this difficult context, the production of television series remains quite dynamic, thanks in particular to the support of organizations such as the International Organization of La Francophonie and the acquisitions of channels such as TVS Monde. This is how cult series such as *Bobodioufs* by Patrick Martinet, *Kadi Joli* by Idrissa Ouédraogo and *Commissariat de Tampy* by Hébié Missa have been widely distributed in Africa.

**DISTRIBUTION, EXHIBITION AND BROADCAST**

**CINEMA EXHIBITION**

According to the DGCA, the country has a total of 46 cinemas, 7 of which work on a regular basis, 9 irregularly, and 30 which are not working. The working cinemas programme between 50 and 60% local films. The two cinemas belonging to the Canal Olympia group, which provide 300 seats each and have been working since 2017, programme an average of 80% foreign films (American blockbusters in particular), 15% African films and 5% Burkinabe films.

Apart from large cities such as Ouagadougou and Bobo-Dioulasso, other localities are not taken into account in the screening plans of films. Infrastructures, which are often in poor condition, exist in the provinces, but are not operational.

The theatres are expected to expand in 2021 with the Ciné Guimbi rehabilitation project in Bobo-Dioulasso, the country’s second largest city.

Despite the limited number of cinemas, the majority of Burkinabe remain cinephiles and clearly indicate their interest in local films, followed by African films.

**BROADCAST**

The market penetration of television sets in households is gradually increasing, reaching 30% in 2019. The majority of households still principally receive free-to-air channels, with terrestrial television remaining the most common means of access. The country officially completed its transition to digital terrestrial television (DTT) in 2019, much earlier than many neighbouring countries.

The Société Burkinabè de Télédiffusion (STB), in charge of managing DTT, broadcasts 17 channels with national coverage and 4 channels with regional coverage.

The pay television market is dominated by the operator Canal+.

**DIGITAL PLATFORMS**

Mobile market penetration reached 97% of the population in 2019. The market is shared between three operators: Onatel (Etisalat), Orange and Telecel Faso. 32% of mobile subscribers had access to the Internet via their mobiles in 2019.

There are not many online or smartphone film streaming platforms in Burkina Faso. The recent ONATEL Ciné provides all genres of films with a daily subscription option.

Netflix’s video-on-demand services are also available, but the number of subscribers remains modest due to poor Internet connectivity in households.

**FUNDING SOURCES AND MECHANISMS**

In the early 1970’s, Burkina Faso set up the Fund for the Promotion and Expansion of the Film Industry (Fonds de promotion et d’extension de l’activité cinématographique), funded by a tax levied on the sale of cinema admission tickets. This device did not survive the operating crisis and the closure of many cinemas that occurred at the end of the 90s.

In 2016, The Development Fund for Culture and Tourism (Fonds de Développement Culturel et Touristique, FDCT) was created with the principal mission to provide the cultural and tourism sectors with financial and technical support, in order to ensure their development.
Another funding mechanism is the Support Programme for the Creative Industries and Governance of Culture (Programme d’Appui aux Industries Créatives et à la Gouvernance de la Culture, PAIC-GC).\(^{13}\) The programme is co-funded by the Burkina Faso government and the European Union for a period of 5 years (2018-2023), and concerns three sectors: arts, crafts and design, the film and audiovisual industry, and the performing arts.

Burkinabe producers also have access to grants from international institutions such as the International Organisation of La Francophonie (OIF) and the ACP-EU Culture programme. A significant source of funding in Burkina Faso comes from international NGOs and other local development and cooperation systems on the ground and the cultural services of embassies.

Finally, as mentioned above, some producers succeed in financing their low budget productions by raising private funds from institutional and commercial partners.

**PROMOTION**

The Pan-African Film and Television Festival of Ouagadougou (Fespaco)\(^ {14}\) is the most important event on the African film and audiovisual scene. It has been in existence since 1969 and has held all of its editions on a regular and continuous basis.

At its last edition in 2019, 165 films from 16 African countries competed for the various prizes over the eight days of the festival.\(^ {15}\) In total, more than 4,000 industry professionals from Africa and the African diaspora came to the festival and more than 100 professional meetings were organized in the biennial festival’s secondary events.\(^ {16}\)

The International African Film Market (Marché International du Cinéma Africain, MICA)\(^ {17}\) takes place during FESPACO. Since its inception, the MICA has struggled to establish itself as a market platform, although certain signs appear to indicate that efforts are under way for more effective professionalization of the platform.

Koudougou Doc\(^ {18}\), founded by the filmmaker Michel K. Zongo, is a festival specializing in documentary films by authors from Burkina Faso, the continent and the world. Lastly, the Sotigui Awards\(^ {19}\) are a celebration of the multiple talents of professionals in the African film and audiovisual industry.

**EDUCATION AND TRAINING**

The country’s first film school, the African Institute for Film Studies (Institut africain d’éducation cinématographique, INAFEC), opened in 1977 with the help of UNESCO. The INAFEC was open to nationals of all African states. It closed in 1987, and was replaced in 2006 by the Higher Institute for the Video and Sound Recording Industry/Studio-School (Institut Supérieur de l’Image et du Son/Studio-École, ISIS-SE).\(^ {20}\) Students at the Institute are trained by professionals, teachers and experts in their field. The ISIS is a member of the International Association of Film and Television Schools (Centre International de Liaison des Écoles de Cinéma et de Télévision, CILECT).\(^ {21}\)

The Imagine Institute (Institut Imagine), created in 2003 by the filmmaker Gaston Kaboré, provides initial and advanced training opportunities as well as teacher training in all professional occupations connected with the film, television and multimedia industries.\(^ {22}\)

The Ouaga Film Lab\(^ {23}\), launched in 2016, centers on the development of film projects. It provides filmmakers with a chance to develop their projects, acquire presentation techniques, and the opportunity for supervised stages of development. In parallel to the Ouaga Film Lab, the Producer Lab launched by Génération Films\(^ {24}\) invites 5 young producers from francophone African countries to strengthen their production skills.

Finally, the Koudougou Doc festival is also dedicated to training for occupations in the film and audiovisual industry at all stages of the production of documentaries. Since 2019, Koudougou Doc has been organizing a writing residency for experienced writers and film-makers with DocA\(^ {25}\).

### NOTES

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BURUNDI

This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The Ministry of Youth, Sports, and Culture (Ministère de la Jeunesse, des Sports et de la Culture) and the Ministry of Communication, Information Technology and Media (Ministère de la Communication, des Technologies de l’Information et des Médias) share responsibility for Burundi’s film and audiovisual sectors.

The Burundian Collective of Producers for Audiovisual and Cinema Development (Collectif des Producteurs pour le Développement de l’Audiovisuel et du Cinéma, COPRODAC) is a non-profit association approved by ministerial decree in 2011 that is very active in the various fields of reflection aimed at developing the sector.

In 2009, the Burundian Association of Image and Sound Creators (Association Burundaise des Créateurs d’Images et du Son, ABCIS) was created by professionals in the sector with the view of promoting the Burundian film industry.

FILM AND AUDIOVISUAL POLICY

The provisions, primarily administrative in nature, set out in Law No. 1/15 of 9 May 2015, apply for all means of communication, be it audiovisual, cinematographic, written, online, and all media in both the public and private domain. When it comes to cinema specifically, Article 43 of the law states that the production of a film on Burundian territory is subject to prior authorization.

COPYRIGHT PROTECTION AND PIRACY

The legislation regarding copyright is set out in Law No. 1/021 of 30 December 2005 on the protection of copyright and related rights in Burundi. The body responsible for copyright management is the Burundian Copyright and Neighboring Office (Office Burundais du Droit d'Auteur et des Droits Voisins, OBDA) under the authority of the Ministry of Youth, Sports and Culture.

PRODUCTION

FILM

The film Gito l’Ingrat, directed by Léonce Ngabo is recognized for being the first film in the country’s history. The film was rewarded at the Carthage Film Festival (Journées Cinématographiques de Carthage), the Namur Film Festival (Festival de Namur) and at FESPACO.

Nowadays, regular local productions have established themselves thanks to a new generation of film-makers. However, it remains rare for Burundian films to achieve international recognition.


Finally, Burundi has served as the landscape for some foreign films, in particular documentaries. The most well-known film shot in Burundi is King Solomon’s Mines (1950) by Compton Bennett and Andrew Marton.

TELEVISION AND VIDEO

The majority of professionals in the audiovisual industry in Burundi work mostly in the production of video clips, wedding videos, and institutional content for companies and non-governmental organizations (NGOs).

DISTRIBUTION, EXHIBITION AND BROADCAST

CINEMA EXHIBITION

The only cinema listed is that of the Institut Français of Burundi in Bujumbura. Cinema exhibition in the country principally consists of projection spaces in working-class districts, which show films without copyright approval.
BROADCAST
The market penetration rate of television sets remains extremely low in Burundi, at 5% in 2019. Channel reception essentially consists of analogue terrestrial television as the transition to digital terrestrial television (DTT) has not yet been finalized.10

The National Radio Television of Burundi (Radio Télévision Nationale du Burundi, RTNB) is a public service audiovisual group which brings together two radio channels and one television channel. Best Entertainment Television (BeTV) is a local private television channel established in Bujumbura since 2017. As for the pay television sector, the French telecommunications company Canal+ dominates the market, followed by the Chinese company StarTimes and DStv (MultiChoice).

DIGITAL PLATFORMS
Burundi had 1.61 million Internet subscribers in January 2021, indicating a 39% growth between 2020 and 2021 and a market penetration rate of 13.3%.

The country also has 7.47 million mobile phone subscribers, representing a 14% increase between 2020 and 2021 and a market penetration rate of 61.9%.11

FUNDING SOURCES AND MECHANISMS
Stakeholders indicate that there are no sources of funding for cinema or audiovisual production in Burundi. Debates on this issue regularly take place during the International Festival of Cinema and Audiovisual in Burundi (Festival de Cinéma et audiovisuel du Burundi, FESTICAB).12

PROMOTION
The FESTICAB13 is an initiative promoted by the Burundian Association of Image and Sound Creators (Association Burundaise des Créateurs d’ Images et du Son, ABCIS), which has become a major annual event in the region14, its 11th edition having taken place in 2021.Screenings take place in schools and outdoors in villages during a tour of the many provinces of the country.

EDUCATION AND TRAINING
The Sectoral Support for Cultural and Creative Players Project in Burundi (Projet d’Appui Sectoriel aux Acteurs Culturels et Créatifs, PASSAC Burundi),15 supported by the European Union, is run by a consortium of Burundian and Belgian groups such as Africalia, Adisco and Menya Media.16 It provides artistic and technical training for the film/audiovisual sector, performing arts, visual arts, and artistic crafts. The skills in need of strengthening were determined by a skills assessment carried out at the beginning of the programme. Workshops are run online and in person by local and international professionals.

Furthermore, FESTICAB organizes various short training programmes at every edition of the festival in the form of workshops with the support of African and international filmmakers.

NOTES
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The Cabo Verde Film and Audiovisual Association (ACACV) is an association representing industry professionals created in 2012.

**FILM AND AUDIOVISUAL POLICY**

The initiatives of the Ministry of Culture and Creative Industries are built around the Cross-Sectoral Strategic Plan, and the Plan Cabo Verde Creativo - selo de certificação. The Cabo Verde Law on the Film and Audiovisual Industry, put forward by the Ministry of Culture and Creative Industries and approved by the Parliament in June 2020, establishes “the principles and criteria of State action to promote, protect and encourage the production, distribution, exhibition and dissemination of cinematic art”. It is Cabo Verde’s first legislation on the film industry and is intended as a catalyst for the development of the film and audiovisual sector. The law includes a set of financial incentives and promotes internationalization, the development of new talents, and writing for cinema. The law also provides for the granting of tax incentives in order to promote the country as a destination for the shooting of films and to organize of international film and audiovisual events.

Obligations are established for producers receiving state funding, including the requirement to report on the funded projects and the inclusion of the work into the National Archives of Cabo Verde. Support is also planned for professional training in the sector as well as incentives for promoting filmmaking and audiovisual education, in particular through the introduction of film programmes in schools and the dissemination of cinematic works of historical importance.

**COPYRIGHT PROTECTION AND PIRACY**

The Cabo Verdean Publishing Rights Society (SOCA) as well as the Institute for Quality Management and Intellectual Property are responsible for registering trademarks and patents and protecting royalties and copyright in Cabo Verde.

The professionals in the film and audiovisual industry consulted for this study states that piracy in Cabo Verde can be considered rather marginal.

**PRODUCTION**

**FILM**

The first known films produced in Cabo Verde were *O Guarda Vingador* (1954), *O Cavaleiro Mascarado* (1954) and *Segredo de Um Coração Culpado* (1955) all of which were directed by Henrique Pereira, as well as *Força de Cobra* and *Chang Terror* by Mindelo de Chiquinho de Nhô Djunga.


The audiovisual market in Cabo Verde has recently shown considerable dynamic progress. Several producers and authors are making names for themselves thanks to the quality of their projects, the most dynamic among them being the Krioscope Company run by Samira Vera Cruz, and Parallax run by Pedro Soulé, Korikaxoru de Yuri and Natasha Ceuchnik. The presence of these young producers and authors has attracted attention at several festivals, thus highlighting the country’s creative potential despite a national level of production that is still limited and estimated at 5-8 titles per year all genres included.

TELEVISION AND VIDEO

Television channels in Cabo Verde produce very little off-stream local content. The Cabo Verdean Images Agency (ACI) produces content such as Quintal di Belinha and Nha Terra Nha Cretcheu for the Portuguese channels RTP Internacional and RTP Africa, as well as educational content for the Ministry of Education. Economic activity can also be identified in video production, which generates employment and provides video coverage of family (baptisms, weddings, etc.) and institutional events. This sector cannot be quantified to date.

DISTRIBUTION, EXHIBITION AND BROADCAST

CINEMA EXHIBITION

The first theatre screening of a film took place in Cabo Verde in 1909, but the first cinema in the archipelago was inaugurated in 1919. In 1922, the Eden Park cinema was opened, which played a primordial role in the social and cultural development of the city of Mindelo. This cinema is currently being transformed into a hotel complex. Today, the only two working cinemas, Ciné Praia Shopping and Shopping Palmarejo, are located in the capital, Praia.

BROADCAST

Television penetration reached 83% of households in 2019. Most households still receive free-to-air (FTA) channels, principally distributed via terrestrial analogue networks. The TDT distribution network plans to make 11 channels available, and the ongoing digital transition has established a switch-off schedule for completion in April 2021.

Cabo Verde has 3 free television channels: Televisão de Cabo Verde (TVC), a public channel whose programming principally consists of talk shows, news and entertainment programmes; TV Record, a subsidiary of the Brazilian Record channel, which mainly broadcasts telenovelas; and the general interest channel TIVER.

Pay television services are provided by the operators Cabo Verde Telecom and Boom TV.

DIGITAL PLATFORMS

The 2018 report of the Cabo Verde National Institute of Statistics indicates 642,014 mobile subscribers, representing a penetration rate of 119.0% per 100 people, and 396,868 people having Internet access with a penetration rate of 73.8%.

Mobile Internet access is the most common form of access and the free-access KONECTA network is available in the country’s public spaces and airports, as an integral part of the Cabo Verde Digital Strategy. A fixed Internet network, CVMultimedia, and two mobile Internet networks, CVMóvel and Unitel T+, enable access to OTT platforms.

FUNDING SOURCES AND MECHANISMS

Since 2018, the Government has placed funding at the disposal of the Cabo Verde Film and Audiovisual Association (ACACV), thus allowing it to publish calls for applications for the financing of national production projects. These calls for applications are aimed at promoting the development of the national audiovisual and film sector, in order to enable the emergence of a greater number of works.
Five projects are selected by a national panel of film industry professionals. There have been two calls for projects since the launch of this funding source.

Another public funding mechanism put in place in February 2021 is the Cabo Verde Autonomous Fund for the Support of Culture and the Creative Industries (FAACICCV) which, via the passing of a Decree-Law, determines that 10% of the dividends from social games go to the Fund. 16

The Ministry of Culture has also put in place a protocol with the ECOWAS Bank for Investment and Development (EBID) 17, which creates a guarantee fund with the Banco da Cultura-Fundo Autonomo de Apoio a Cultura, enabling the latter to negotiate reimbursable financing for cultural projects with commercial banks, but also with companies within the framework of the law on sponsorship. This Autonomous Fund is responsible for supporting projects. The music sector is the biggest beneficiary of this source of funding, but apart from the reimbursement conditions, there is nothing to prevent the film and audiovisual sector from applying for funding. 18

Since 2015, the DOCTV-CPLP Programme, which supports the production and dissemination of audiovisual content from the Community of Portuguese Language Countries (CPLP), has also supported the production of 3 Cabo Verdean documentaries, to the amount of U.S.$59,000 per project. A version for fiction (FICTV-CPLP) has taken place on one occasion. 19

Finally, Cabo Verdean producers are gradually and successfully approaching international sources of funding, especially European, within the framework of jointly-produced projects.

### PROMOTION

Several small film festivals attracting a limited number of filmgoers are held in Cabo Verde every year, including the Plateau-Festival Internacional de Cinema da Praia, organized by the Ministry of Culture and the Cabo Verde Film and Audiovisual Association, the Cabo Verde International Film Festival, held on the island of Sal since 2010, the Fáxi Fáxi Festival, inspired by the Fast Forward Festival, and the Gia National Film Festival, in the city of Mindelo.

### EDUCATION AND TRAINING

Several public and private universities and art schools such as the University of Santiago, the University of Cabo Verde, and the Jean Piaget Institute provide training courses of various lengths and levels in the multimedia and audiovisual field. Agreements have recently been signed for the implementation of the RTC Academy, a training centre in the field of audiovisual communication 20.

The Mindelo Escola Internacional de Arte (M_EIA) of the Instituto de Arte, Tecnologia e Cultura, a private non-profit initiative, runs various short courses and workshops. The Mindelo Escola Internacional de Arte (M_EIA) provides a Specialized sensu lato Cinema and Audiovisual Course (3rd year undergraduate), with the support of the Ministry of Higher Education, Science and Culture of Cabo Verde, in partnership with the Brazilian State Secretariat for Culture, which is open to participants from Portuguese-speaking countries of Africa. 21

The Cabo Verde Film and Audiovisual Association (ACACV) regularly runs short courses in various technical and artistic fields, in particular in the field of advertising content, in partnership with other organizations, principally Portuguese and Brazilian.

The consensus view of industry professionals is that training opportunities are sporadic, fragmented, and of a quality that does not correspond to any overall skills development strategy for the sector.
CAMEROON

**Population:** 33.8 million

**GDP per capita:** US$ 3,653

**Median age:** 18.7 years

**Urban population:** 57%

**Rural population with access to electricity:** 23%

**Mobile phone subscription:** 69.1%

**Internet users:** 23.2%

**Female upper secondary education completion rate:** 19%


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

**INSTITUTIONAL FRAMEWORK**

**MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS**

The Ministry of Arts and Culture is the institution responsible for overseeing the film sector. Within the Ministry, the Directorate of Filmmaking and Audiovisual Production (Direction de la cinématographie et des productions audiovisuelles) is in charge of film standards and controls, the cinémathèque, screenings, statistics, among others.

The media and the audiovisual sector fall under the mandate of the Ministry of Communication, which notably oversees the development and dissemination of audiovisual creation and encourages the development of educational and cultural programmes. The National Communication Council is the regulatory body for the audiovisual landscape.

There are numerous trade associations organized on a corporate basis. Among the most visible of these are the Association of Independent Producers of Cameroon (Association des Producteurs Indépendants du Cameroun, APIC) created in 2006 and the Cameroon Film Industry (FIC) created in 2013.

**FILM AND AUDIOVISUAL POLICY**

Law No. 88/017 of December 16, 1988 sets the direction of the film sector. It provides in its Article I that "cinematographic activity is exercised in the field of audiovisual communication and is subject to special laws relating to the arts, intellectual property, commerce and industry".

The Ministry of Arts and Culture has ensured the classification of films in Cameroon and the issuance of permits for the distribution, exploitation and commercialization of video material. It should be noted that a Film Industry Development Fund (FODIC) was established in 1973 to support film production. The Fund was backed by a law that imposed a tax on cinema admission tickets. The fund's activities came to an end in 1990.

Steps have been taken providing for fiscal measures in the field of Arts and Culture. However, stakeholders report that application thereof is non-existent and that the provisions have therefore not had any impact on economic activity, primarily due to the administrative complexities surrounding them.

Concerning the audiovisual sector, the Law 2015/007 of 20 April 2015 governs audiovisual activities in Cameroon.

**COPYRIGHT PROTECTION AND PIRACY**

In Cameroon, stakeholders estimate losses due to piracy at between 75 and 100% of earnings. Cameroon joined the World Intellectual Property Organization in 1973. The legislative framework with regard to copyright protection and piracy consists of Law no. 2000/11 of 19 December 2000 on copyright and related rights, Decree no. 2001/956/PM of 1 November 2001 laying down the mode of enforcement of the law, and Decision no. 00014/MINCULT/CAB of the Minister of Culture creating the National Committee for fighting against Piracy (Comité national de lutte contre la contrefaçon).

Three organizations for the collective management of copyright and neighboring rights exist in Cameroon, of which the Civil Society of Audiovisual and Photographic Arts (Société Civile des Arts Audiovisuels et Photographiques, Scapa) whose field of competence covers the cinema and audiovisual sectors.

**PRODUCTION**

The Ministry of Arts and Culture lists around one hundred production companies active within the country. Although no official figures are available, stakeholders estimate that the production of film and audiovisual content is one of the sectors providing the most jobs to young people in Cameroon.

**FILM**

Cameroonian cinema had its hour of glory in the 1970s and 1980s, in particular with films such as Muna Moto (1975) by Jean-Pierre Dikoungu Pipa, which was awarded the Étalon d’or de Yennenga at the FESPACO PanAfrican Film Festival. Other important Cameroonian film-makers include Daniel Kamwa with Bouba Cravate (1973), Pousse Pousse (1976) and Our Daughter (1980, Notre fille); Bassek ba Kobhio with Sango Malo / The Village Teacher (1991), The Great White Man of Lambaréné (1995, Le Grand Blanc de Lambaréné) and The Silence of the Forest (2003, Le Silence de la forêt), which was presented in the “Un Certain Regard” section at the Cannes Film Festival;
In the Francophone area, producers and filmmakers, many of whom have received film and audiovisual training in professional organizations, have developed skills in making applications for funding for the production of films with higher budgets, after the model of the French system.

The coexistence of these two approaches is developing, creating a new generation of Cameroonian filmmakers who, with varying degrees of success, are giving rise to a notable progression in the number and quality of films produced within the framework of a hybrid model, independent of funds and subsidies but taking local audiences into account.


TELEVISION AND VIDEO

In recent years, there has been a boom in television series such as Madame... Monsieur, Otage d’amour, Habiba, Samba, Guerre des sexes, Divine, Quartier chaud, Bad Angel etc., which have achieved great popular success on local channels.

Cameroon Radio Television (Radiodiffusion-Télévision du Cameroun, CRTV), the Cameroonian public radio-television broadcaster, is invested in the purchase of local content. Private television channels also work for the dissemination and visibility of Cameroonian films and TV films. There is also a breakthrough in Cameroonian audiovisual content on international channels, notably TV5 Afrique or A +.

The market for television advertising, and corporate, music and events videos is also flourishing and represents a significant source of employment.


There are currently hundreds of filmmakers and local films produced each year. Two economic models coexist. Producers and filmmakers in the Anglophone area, for the most part self-taught, have developed skills in the production and marketing of very low-budget films on the Nigerian model. The model establishes the beginnings of an industry adapted to its natural market, although this economic activity does not yet generate earnings.
45% of mobile subscribers had access to the internet via their mobile in 2019.

In 2020, Cameroon had 7.87 million Internet subscribers, corresponding to a market penetration rate of 30% of its population.\textsuperscript{11}

As regards VOD, the market, which is small in terms of number of subscribers, is shared between the streaming platforms CanalPlay, Showmax and Netflix. In 2021, Netflix acquired the streaming rights for two Cameroonian films for the first time, \textit{The Fisherman’s Diary} (2020) directed by Enach Johnscott and \textit{Therapy} (2020) by Anurin Nwunembom and Derrick Musing.\textsuperscript{12}

Moreover, the PlayVOD platform\textsuperscript{13} provides local and international films and series in partnership with the mobile phone network providers Orange and MTN.

**FUNDING SOURCES AND MECHANISMS**

After the end of the Film Industry Development Fund (FODIC) in 2000, a Special Allocation Account for the Support for Cultural Policy (Compte d’Affectation Spéciale pour le Soutien de la Politique Culturelle) was created in 2001. Currently, this special account seems, however, inoperative according to stakeholders consulted.

The NGOs and other international bodies present make funding available for educational and awareness-raising films. To a limited extent, brand sponsorship, in particular from breweries, is another possible source of funding for film and audiovisual projects.

**PROMOTION**

In 2019, 36 film festivals were listed in Cameroon.\textsuperscript{14} The oldest of these festivals, and only one with a regular organizational structure is Ecrans Noirs, created in 1997 by filmmaker Bassek Ba Kobhio, who has also organized the Central Africa Film Market (Marché du Film de l’Afrique Centrale, MIFAC).\textsuperscript{15} In the Anglophone area, the Cameroon International Film Festival (CAMIFF) is also very active.\textsuperscript{16}

**EDUCATION AND TRAINING**

Cameroon’s public universities (Buea, Douala, Oshang, Ngaoundéré, Yaoundé I, Yaoundé II, Maroua and Bamenda) provide diplomas up to a doctorate level in cinema within the faculties of performing arts. In addition to the specialized courses provided by public universities, some art schools also award qualifications such as the Audiovisual Heritage Training and Conservation Institute (Institut de formation et de conservation du Patrimoine Audiovisuel, IFCPA) of the CRTV.\textsuperscript{17}

The training available in the film and audiovisual field is supplemented by various specialized audiovisual and film industry vocational training courses, but these private schools have difficulty in having their film industry vocational training courses validated by the higher education authorities.\textsuperscript{18}

The festivals are also a place of learning for many young people, with master classes, seminars and training workshops offered as part of the programme.

**NOTES**

4. https://minac.cm/programmes-etservices
5. www.wpiosnt.fr/details.jsp?country_id=37
6. https://www.aiminfo.fr/journal-afrique-contemporaine-
7. https://www.camerountribune.cm/article.html/37526/
10. https://dataxis.com/product/marketreport/televison-
12. https://www.ecransnoirs.org/therapy-and-the-
15. https://www.ecransnoirs.org
17. https://camerounpower.fr/concoursifcpa-de-la-crtv-
18. www.goethe.de/ins/cm/ft/kul/mag/20822796.html
Central African Republic

Population: 5.9 million
GDP per capita: US$ 945
Median age: 17.6 years
Urban population: 41.8%
Rural population with access to electricity: 16.3%
Mobile phone subscription: 27.7%
Internet users: 4.3%
Female upper secondary education completion rate: 5%


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

Institutional Framework

Main representative and regulatory institutions

The Ministry of Arts, Culture, and Tourism (Ministère des Arts, de la Culture et du Tourisme) and more specifically the Directorate of Cinematography (Direction de la Cinématographie) are the institutions for overseeing the film sector.

The Ministry of Communication and Media (Ministère de la Communication et des Médias) is responsible for the audiovisual industry and primarily works through the public channel, Télévision Centrafricaine (TVCA).

Film and audiovisual policy

In September 2020, the International Organization of La Francophonie (Organisation Internationale de la Francophonie, OIF), in partnership with the Ministry of Arts, Culture, and Tourism, launched a national consultation in Bangui in view of elaborating the cultural policy of the Central African Republic. This initiative aims to provide the country with a law on strategic orientations to organize the state intervention in the field of culture.

Copyright protection and piracy

According to stakeholders consulted, the income lost due to piracy is estimated to be between 75 and 100%. A new law on copyright and neighboring rights was promulgated at the end of December 2020. This initiative is also behind the creation of a new collecting society.

Production

Stakeholders consulted estimate that there are 10 production companies active with 100 direct jobs.

Film

The film The Silence of the Forest (Le Silence de la Forêt), directed by Didier Ouenagaré, is considered the first feature-length film made by a Central African filmmaker.

Since then, thanks to training supported by the Institut Français in partnership with Ateliers Varan, there has been an emergence of several film productions.

Some Central African films have been shown and awarded prizes at international festivals, such as the documentary Makongo (2020) directed by Elvis Sabin Ngaibio, which was awarded prizes at the Festival du Réel in Paris and the Venice Film Festival, and the feature-length fiction Yembi (2018) by Eric Sabe.

Television and video

Television production remains underdeveloped. National broadcasters are not very invested in the production and co-production of creative content.

The majority of professionals in the audiovisual industry survive thanks to the production of documentaries and other awareness-raising content for Non-Governmental Organizations (NGOs).

Distribution, exhibition and broadcast

Cinema exhibition

At the beginning of the 2010s, there were five cinemas. Today, the country only has two, including the cinema operated by Alliance Française.

The NGO Cinéma Numérique Ambulant organizes mobile screenings in various locations in the capital and in the provinces.

Broadcast

The market penetration of television sets remains weak, reaching barely 7% of households in 2019. The majority of access continues to be provided by analogue terrestrial television as the national transition into digital terrestrial television (DTT) has not been finalized yet. There is one public channel, Télévision Centrafricaine (TVCA), as well as two private channels, Vision 4 RCA and Global TV Africa. Pay television services are provided international groups Canal+ and StarTimes.
DIGITAL PLATFORMS

The Central African Republic had 557,000 internet subscriptions in 2021, that is a market penetration of 11.4% of the population, and 1.5 million mobile subscriptions representing a growth rate of more than 9% between 2020 and 2021 and 30.7% of the population.\(^1\)

The VOD market is currently non-existent.

FUNDING SOURCES AND MECHANISMS

Stakeholders consulted indicate that there is currently no funds for the cinema or the audiovisual industry.

PROMOTION

The Central African Association for Audiovisual Promotion and Development (Association centrafricaine pour la promotion audiovisuelle et le développement) in partnership with Alliance Française in Bangui organized the first edition of the “Bangui Fait Son Cinéma” Festival in November 2020.\(^12\)

EDUCATION AND TRAINING

There is no permanent and structured training in the cinema and audiovisual sectors. However, a few initiatives do exist, such as the Ateliers Varan organized since 2017 within the framework of the Alliance française de Bangui. There is also the initiative carried out by the Alliance française de Bangui in collaboration with the Lyon Film School, the CinéFabrique. Nearly 50 young professionals in the sector have benefited from these training initiatives.

NOTES

2. https://communication.gouv.cf
9. National Television Organization, Télévision Centrafricaine TVCA
10. Radio Ndeke Luka, July 2017 Vision 4 RCA, une nouvelle chaîne de télévision dans le paysage médiatique
12. Active Facebook Profile https://web.facebook.com/BanguiFaitSonCinema
**CHAD**

Population: 21.7 million  
GDP per capita: US$ 1,580  
Median age: 16.6 years  
Urban population: 23.3%  
Rural population with access to electricity: 2.7%  
Mobile phone subscription: 45.1%  
Internet users: 6.5%  
Female upper secondary education completion rate: 4%


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

### INSTITUTIONAL FRAMEWORK

**MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS**

The film sector is under the supervision of the Ministry of Culture and the Promotion of Diversity (ministère de la Culture de la Promotion de la Diversité). The Ministry of Communication (Ministère de la Communication) is responsible for the audiovisual sector. The High Media and Audiovisual Authority of Chad (Haute Autorité des Médias et de l’audiovisuel) is the regulatory body for the audiovisual sector.

**FILM AND AUDIOVISUAL POLICY**

The law of 2010 on audiovisual communication is the body responsible for the management of copyright in Chad. Its work needs to be implemented in the field of cinema or the audiovisual industry.

**COPYRIGHT PROTECTION AND PIRACY**

The Chadian Copyright Office (Bureau Tchadien du Droit D’Auteur, BUDTRA) is the body responsible for the management of copyright in Chad. Its work needs to be implemented in the field of cinema or the audiovisual industry.

**PRODUCTION**

The existing local production companies are estimated at around twenty by stakeholders, including two-thirds established in N’Djamena, with jobs estimated at around 100 people.

**FILM**

Director Mahamet Saleh Haroun, is the most emblematic figure of Chad’s cinema. He made his first short film, *Tan Koul*, in 1991, but it was his second film, *Maral Tanié*, produced in 1994, that put him on the map. He then filmed *Goï-Goï* (1995), his first feature-length film *Bye Bye Africa* (1999), *Abouna* (2002), *Daratt* (2006), which won the Bronze Stallion of Yennenga (Étalon de bronze de Yennenga) as well as Best Cinematography at FESPACO, the documentary *Kalala* (2006), *A Screaming Man* (*Un homme qui crie*, 2010) which won the Jury Prize at the Cannes Film Festival, *Grisgris* (2013), the documentary *Hissein Habré, a Chadian Tragedy* (*Hissein Habré, une tragédie tchadienne*, 2016), *A Season in France* (*Une Saison en France*, 2017), and most recently *Lingui* (2021) which has been selected to compete in the Cannes Film Festival.

Issa Serge Coelo is another established Chadian film-maker who has directed more than a dozen works (documentaries and fiction), and has produced several films by African film-makers. Although limited by budget restraints, a lack of training in the sector and poor means, a new generation of film-makers is appearing and trying to make films in this difficult context. Achille Ronaimou, Allamine Kader, Carine Kaguerou, Aché Coelo and Bourma Hassan are amongst the emerging young authors.

**TELEVISION AND VIDEO**

Public television channels seems to have initiated a policy of ordering content from independent producers. Private channels are not very invested in the production or co-production of local creative content. The video production sector (institutional, weddings, video clips, and documentaries for Non-Governmental Organizations) provides the main source of work for a great number of small individual businesses. This sector allows many young people to develop technical skills, especially in filming and editing.

**DISTRIBUTION, EXHIBITION AND BROADCAST**

**CINEMA EXHIBITION**

Of the seven cinemas in the country in the 1960’s, only the 440-seat Le Normandie cinema reopened in 2011. The French Institute of Chad in N’Djamena (Institut Français du Tchad) also has a cinema with a regular programme.

**BROADCAST**

Market penetration of television sets remains weak, reaching around 11% of households in 2019. The majority of access continues to be provided by analogue terrestrial television as the national transition to digital terrestrial television (DTT) has not been finalized yet.
TV Tchad is a public channel. Chad also has 5 free private channels: Alnassr TV, Election TV, ONRTV, Chad 24 TV, and Tournai TV. Pay television services are provided by the international groups Canal+, OSN and beIN, as well as some local operators.8

DIGITAL PLATFORMS

The country had 2.86 million Internet users in January 2021, representing a market penetration rate of 17.2% and a growth rate of 28% between 2020 and 2021. The country has 8.1 million mobile phone subscribers, that’s is a market penetration rate of 48.6% and growth rate of 5.6% between 2020 and 2021.9

The figures for the consumption of online video services are not available

FUNDING SOURCES AND MECHANISMS

According to the stakeholders consulted, no source of public funding for the film and audiovisual industry exists in Chad. Local producers sometimes find funding from NGOs. Many of them are increasingly applying to European funding mechanisms. Sponsoring from commercial brands is also a common form of funding in the Chadian audiovisual industry.

PROMOTION

In 2018, the first Chadian Short Film Festival (Festival tchadien de court-métrage de N’Djamena, FETCOUM) was held. The event included film screenings, writing and acting classes, as well as conferences on the production of films in Africa and the economic empowerment of women in culture.10

The Sao Film and Audiovisual Festival (Festival du cinéma et de l’audiovisuel Sao) has also been held twice.11

EDUCATION AND TRAINING

The Polytechnic Engineering, Business and Administration school (École Polytechnique d’Ingénierie, de Commerce et d’Administration, EPICA)12 has mentioned the possibility of a Cinema and Audiovisual course, within the framework of its Department of New Information and Communication Technologies.

The Department of Information Science and Technology of the University of N’Djamena offers two training cycles at the bachelor’s and master’s degrees levels with a specialization in the last year of the master’s degree in journalism and media studies or communication, culture and development.13 Other training opportunities have a short length, often associated with events.

NOTES

1. https://www.refram.org/Les-membres/HAMA-Tchad
3. https://www.wipo.int/members/fr/contact.jsp?country_id=166
7. https://culture.tv5monde.com(cinema/auchad-la-legendaire-salle-de-cinema-la-normandie-renaît-de-ses-cendres-16658
COMOROS

Population: 1.1 million
GDP per capita: US$ 3,081
Median age: 20.4 years
Urban population: 29.2%
Rural population with access to electricity: 77%
Mobile phone subscription: 59.9%
Internet users: 8.5%
Female upper secondary education completion rate: not available


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The film sector falls within the competence of the Ministry of Youth, Sport, Education and Culture. To date, stakeholders indicate that there are no professional associations in the film sector. The only authority in the audiovisual field is the National Press and Audiovisual Council (Conseil National de la Presse et de l’Audiovisuel, CNPA).

FILM AND AUDIOVISUAL POLICY

Laws on the film and audiovisual sector do not exist. Since the 90s, players in the cultural sector have been advocating for the implementation of a support fund.

COPYRIGHT PROTECTION AND PIRACY

The Union of the Comoros has signed the Bangui Agreement establishing the African Organization for Intellectual Property (OAPI).1

The Comorian Office of Intellectual Property was created after signing this agreement. It is practically impossible to estimate the percentage of piracy, but it is clearly the mainstream form of film distribution within the territory.

PRODUCTION

FILM

The first film "made in the Comoros", Baco by Ouméma Mamadaly and Kabire Fidaali, a fable on the renewal of power, was released in 1996. It was followed by Barwa super 8 by Ahmed Mzé in 2001, a short fiction film jointly produced by France and the Comoros. In 2008, the short film La Résidence Ylang Ylang by Hachimiya Ahamada was presented at the International Critics’ Week in Cannes. The documentary Madjiniha (2012) by Said Hassane Ezidine was shown at numerous festivals including the Comoros International Film Festival (CIFF), Île Courts - International Short Film Festival of Mauritius, the Rencontres du Film Court Madagascar Festival (RFC) and the International African Film Festival of Africa and the Islands (FIFAI).

Several titles have also marked the presence of Comorian cinema at regional festivals, notably Madajdou (2015) by Asma Binti Daouda, a 1ten-minute documentary, presented in Madagascar at the Rencontres du Film Court. Ink of the Sea (2015) by Laila Abdou Tadjiri, a ten-minute fiction, won a prize at the Comoros International Film Festival (CIFF).

Some films, often produced by filmmakers from the Comorian diaspora, have obtained international support. The documentary Red Card (2020) by Mohamed Said Ouma was presented at the IDFA, while Ashes of Dreams (2011) by Hachimiya Ahamada produced by Shonango films in Brussels participated in the FIFAI (International African Film Festival of Africa and the Islands). Escale à Pajol by Mahmoud Ibrahim received support from La Fémis school and was rewarded at the International Open Film Festival in the United States.

There are currently two production companies in the Comoros: créations nextez by Housseine Ezidine, a communications company, and Les Films Façon Façon by Mohamed Saïd Ouma.

TELEVISION AND VIDEO

Several structures produce various advertising content, video clips, corporate videos, etc.2 These structures create jobs in a relatively unstructured market.

The Comoros has just one public television channel, the ORTC, but it does not contribute to producing content. Disseminating local content requires the approval of higher authorities, as was the case for Red Card by Mohamed Said Ouma.

Several television production companies do exist, however, particularly creations nextez, Interface Prod3 by the rapper AST, and Seawiew Worldcom4, a communications agency.

DISTRIBUTION, EXHIBITION AND BROADCAST

CINEMA EXHIBITION

Up until the 80s, the three islands, Grande Comore, Anjouan and Mohéli, each had a cinema. The three cinemas are now closed, and have become recording studios, concert venues or stores. In 2017, rehabilitation and development initiatives were put forward for these cinemas but are struggling to result in concrete action due to the high cost of the renovation works.5
With no cinema theatre, the preview showing of *Red Card* by Mohamed Said Ouma was held at the women’s centre in 2020.

**BROADCAST**

Television viewing stood at 76% in the Comoros in 2019. Most households still receive free-to-air (FTA) channels, principally distributed via terrestrial analogue networks. Conversion to digital terrestrial television was not yet finalised for many years and the analogue switch-off date remains uncertain. The ORTC is the only national television channel.

The company Canal+ captures most of the pay television market in the country, with channels distributed via direct-to-home satellite (DTH).

**DIGITAL PLATFORMS**

Internet users represent 8.5% of the country’s population, while 59.9% have access to mobile phones.

The platform OI-Film VOD provides access to independent cinema in the Indian Ocean. It offers a film catalogue that covers the islands in the Indian Ocean but also plans to extend its coverage to other countries in the area, particularly Mozambique, South Africa and India. Some professionals have found a broadcasting space on YouTube to allow the general public to access their works.

**FUNDING SOURCES AND MECHANISMS**

There is no known funding mechanism dedicated to culture in the Union of the Comoros. The development of the film and audiovisual industry is largely left to professional initiatives.

Within the framework of the National Press and Audiovisual Council’s “support for media” project, €50,000-€60,000 are allocated to the production of documentary and fiction films. In 2020, a call for projects launched in the archipelago for short films, fiction films and documentaries selected four projects (of which two fiction and two documentaries) out of the six submitted.

**PROMOTION**

The Comoros International Film Festival (CIFF), created in 2012, is still the only platform dedicated to cinema in the Comoros. There have only been two editions (2012 and 2015). Its primary goal is to “revitalise an almost non-existent sector” and to promote Comorian cinema, notably the emergence of “film infrastructures”, particularly a training centre and a cinema theatre.

The CIFF has brought to light local talent, as Comorian films were previously made for the most part by directors from the diaspora. An exciting innovation within the archipelago, the festival has toured all over the Comoros. As the country does not have any cinemas, screenings are organised outdoors in outlying towns and villages. It is thanks to this festival that several young people have embarked on artistic and film creation. The organising committee now intends to focus on training for young people before relaunching the festival.

**EDUCATION AND TRAINING**

Currently, there is no training offer in the film and audiovisual fields.

In 2016, a journalism, communication and multimedia course was introduced at the University of the Comoros, in cooperation with the University of Reunion Island. Its aim was to develop training in the audiovisual sector. This initiative was suspended in 2020 after three years due to the skills gap of the teaching staff. The suspension of this course was announced as temporary in order to better structure it. But to date no restructuring has been planned. Thirty-six students attended this course over the three years.

Since 2019, the National Press and Audiovisual Council (CNPA), in partnership with the Coopération française and in collaboration with Actions Médias Francophones (AMF), has led a multi-faceted project to support the media with a training component in the audiovisual sector. The main actions as part of this project include the creation of a modern studio that can also be used as a training venue. The project provides for support for audiovisual production in the Comoros, but has not yet set out how many students will be trained in the technical and artistic fields. The goal is to create an infrastructure for professionals who do not have the appropriate equipment, for editing and post-production for example, or for television and radio sets. The concepts aims to support Comorian audiovisual production so as to enhance its visibility at the African and international level.

**NOTES**

3. http://cineast.16mb.com
Congo

Population: 7 million
GDP per capita: US$ 3,298
Median age: 19.2 years
Urban population: 67.4%
Rural population with access to electricity: 20.2%
Mobile phone subscription: 95.3%
Internet users: 8.7%
Female upper secondary education completion rate: 13%


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

Cinema is placed under the authority of the Ministry of Culture and Arts (Ministère de la Culture et des Arts), at the core of which the Directorate of Cinema (Direction du Cinéma) is responsible for the administration and supervision of the sector. The audiovisual sector is placed under the authority of the Ministry of Communication and Media (Ministère de la Communication et des médias).¹

The High Council for the Freedom of Communication (Conseil Supérieur de la liberté de Communication)² has the mission of, inter alia, ensuring the quality of content and the diversity of audiovisual programmes, the development of national audiovisual production and creation, and the equitable distribution of state help between public and private communication companies.

Professionals organize themselves around several trade associations such as the Association of Congolese Film-makers (Association des Cinéastes Congolais) created in 2001.

FILM AND AUDIOVISUAL POLICY

Law No. 9 of 26 July 2010 on cultural policy guidance³ establishes the institutional framework for the industry in the Congo. According to the stakeholders consulted, no law or draft law specific to cinema exists.

COPYRIGHT PROTECTION AND PIRACY

Stakeholders estimate loss of earnings due to piracy at between 25 and 50%. The Congolese Copyright Office (Bureau Congolais du Droit d'Auteur, BCDA) is the body responsible for copyright protection. Its action primarily impacts the music industry.

PRODUCTION

Stakeholders estimate that around fifteen structured production companies, based in Brazzaville or Pointe Noire, pursue a regular activity in the country.

FILM

In the 1970s, Congolese cinema saw a promising period, with filmmakers such as Sébastien Kamba, director of The Ransom of an Alliance (La Rançon d’une Alliance, 1973), Jean Michel Tchissoukou with The Chapel (La Chapelle, 1978), as well as David Pierre Fila, Alain Léandre Baker and Camille Mouyeke, from the diaspora.⁴ Subsequently, a new generation emerged with directors such as David Pierre Fila, Sur les paths de la Rumba (2015), Alain Léandre Baker Ramata (2008) and Camille Mouyeke Voyage à Ouaga (2000).⁴ We can also note Said Bongo, author of the films Poaty au royaume de Pounga (2012), Auberge de Martin (2014), Les caprices du Destin (2015) and la Pierre Précieuse in 2016; Richi Mbebele with the film Subtile Manipulation et Grave Erreur; Albé Diaho with the film The Choice (Le choix); and Michael Gandoh with Ironie Fatale.

Few foreign films are filmed in the country. Amongst them, Kongo (2019) a French film by Hadrien La Vapeur and Corto Vaclav, was shown at the Cannes Film Festival in 2019.

TELEVISION AND VIDEO

Local broadcasters are not very invested in acquiring or commissioning local content from producers. On the contrary, producers often have to pay broadcasters if they want to see their content broadcast. However, hundreds of individual companies survive by producing television advertising, corporate videos, video clips, or recordings of events.

DISTRIBUTION, EXHIBITION AND BROADCAST

CINEMA EXHIBITION

Two screens in the Canal Olympia network exist in Brazzaville and Pointe Noire.⁵ In 2016, the Congolese company Cinébox launched the cinema complex MTN Movies House with a 4K screen and 200 seats in Brazzaville.⁶ The French Institute of the Congo (Institut Français du Congo) actively supports the broadcasting of films in its cinemas in Brazzaville and Pointe Noire. The Centre Culturel Zola in Brazzaville has a cinema with 250 seats and prioritizes the broadcasting of Congolese and African films.⁷ Finally, the majority of hotels have spaces for screening films, available to rent for producers who wish to host their previews there.
BROADCAST

The market penetration of television sets is gradually increasing, reaching 64% of households in 2019. The majority of households only receive free-to-air channels, with the most common access being terrestrial television. The transition to digital terrestrial television (DTT) is in progress.

Télé Congo is the public channel; 100% owned by the Congolese National Radio and Television Centre (Centre National de Radio Télévision congolais, CNRTV), the public radio broadcasting and television company in the Congolese state. Only a few private channels aiming to air nationally stand out: DRTV, Top TV, and Vox TV among others. Canal+ is established for years and has dominated the pay television market for several years.

DIGITAL PLATFORMS

The country had 1.79 million Internet subscribers in January 2021, showing a 17% increase from 2020 and a market penetration of 32.1% of the population. Mobile use stood at 95% in 2019. Since the closure of Azur Congo in 2018, only two mobile operators are competing in the market, those being Airtel and MTN. 42% of mobile subscribers had internet access via their phone in 2019.

The VOD market remains extremely small in volume and in value. It is dominated by iROKO+, a platform which has been put in place through a joint-venture between the studio Nollywood iROKO and the French pay television operator Canal+.

The Kamba Awards are organized by the government and reward the best of Congolese cinema.

FUNDING SOURCES AND MECHANISMS

Law No. 9 of 26 July 2010 provides that 0.01% of the national budget will be allocated to culture, some of which will be assigned to cinema, with the creation of a specialized fund. Funds are sometimes available through NGOs in the framework of their awareness-raising and educational programmes.

PROMOTION

Numerous film festivals have known transient existences in the Congo, due to the absence of sustainable financial support. Amongst those that remain active are the Pointe Noire International Short Film Festival (Festival international des courts métrages La Pointe Noire), and the Tazama Festival for African Women’s Films (Festival du film des femmes africaines Tazama) directed by Claudia Yoka.

The Kamba Awards are organized by the government and reward the best of Congolese cinema.

EDUCATION AND TRAINING

Initiatives carried out by young people, such as the Ecole de Métier du Cinéma, are trying to meet the education and training needs of the sector.

The Institut Français du Congo also hosts short training workshops.

NOTES

8. https://www.flesmap.info/pays/congo/media/televisions
17. http://www.ifc-pointenoire.com
THE AFRICAN FILM INDUSTRY • Trends, Challenges and Opportunities for Growth

CÔTE D’IVOIRE

Population: 33.7 million
GDP per capita: US$ 5,238
Median age: 18.9 years
Urban population: 51.2%
Rural population with access to electricity: 32.9%
Mobile phone subscription: 134.9%
Internet users: 46.8%
Female upper secondary education completion rate: 12%


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

Several institutions are involved in the regulation of the sector in Côte d’Ivoire. The audiovisual and film sector is, in principle, under the joint supervision of the Ministry in charge of Culture1 and the Ministry in charge of Communication and Media2.

The Côte d’Ivoire National Office for the Film Industry (Office National du Cinéma de la Côte d’Ivoire, ONACCI) plays an administrative role with the aim of supervising and organizing the film industry in the country, such as the issue of filming permits and other documents necessary for working in cinema. This body is also in charge of the role of safeguarding film heritage through the Film Centre (Maison du Cinéma), which has two sub-directorates: the first should be responsible for the supervision of a Cinémathèque which remains to be created and for training, while the second will take care of a possible Cinema Museum.

With regard to the audiovisual sector, the Telecommunications/ICT Regulator (Autorité de Régulation des Télémcommunications/TIC, ARTCI) is an independent government agency created in 2012, which regulates the telecommunications sector in Côte d’Ivoire.

The High Authority for the Audiovisual Communication Industry (Haute Autorité de la Communication Audiovisuelle, HACA)3, created in 2011, is primarily concerned with television channels, a sector that is fast expanding after the granting of several permits for private channels broadcasting via DTT.

There are industry trade groups, including the Audiovisual Industry Private Professionals’ Association (Association des Professionnels Privés de l’Audiovisuel, APPA), whose founding members include publishers (NCI and Vibe Radio), pay television operators (Canal+), producers and content providers (Côte Ouest Audiovisuel), as well as agencies (Sixième Sens and Efes).

FILM AND AUDIOVISUAL POLICY

Organizational efforts have been undertaken by the supervisory authorities in recent years with the aim of encouraging the development of the film and audiovisual sector. Law no. 2014-426 of 14 July 2014 concerning the film industry, which determines film policy in Côte d’Ivoire, is founded on the State’s will to breathe new life into this sector, which is experiencing numerous difficulties4. The law lays down the broad lines of procedures and regulations for different economic activities in relation to the film industry. However, according to the ONACCI, the implementing decrees have not yet been published5.

COPYRIGHT PROTECTION AND PIRACY

The Ivorian Copyright Office (Bureau Ivorien des droits d’auteurs, BURIDA)6 is the independent and representative collecting body responsible for the management of copyright and related rights.

PRODUCTION

FILM


In 1981, the film Djéli, conte d’aujourd’hui by Fadika Kramo Lanciné won the Grand Prix at the FESPACO Film Festival awards8. A second Ivorian film won the Etalon d’Or at FESPACO with Au nom du Christ (1993) by Roger Gnoan M’Bala. Other notable Ivorian filmmakers include Désiré Ecaré (Visages de femmes, 1972) and Henri Duparc (Dancing in the Dust, original title Bal poussière, 1988).

Today, a new generation is distinguishing itself with works that combine audience success and critical acclaim. In the first category, the feature film L’Interprète (2016) by Kadhy Touré remained at the top of the Ivorian box-office for six months, and the Franco-Ivorian farce Bienvenue au Cordwana10 totalled 17,000 admissions in the region in 2017.
From a critical point of view, the director Philippe Lacôte has attracted attention in recent years with his films Run (2014), selected for the Un Certain Regard section at the Cannes Film Festival, and more recently Night of the Kings (La Nuit des Rois) (2020), selected for numerous international festivals and shortlisted for Best Foreign Film at the 2021 Oscars. Ivorian cinema also boasts a number of internationally renowned actors such as Sidiki Bakaba, winner of the Best Actor Award at the Carthage Film Festival in 1986; Isaac de Bankolé, who has appeared in several films by Jim Jarmush and won the César for Best Newcomer in 1987; and Naky Sy Savane, who won the Best Actress Award at the 1994 Khouribga African Film Festival (Festival du Cinéma Africain de Khouribga) for her role in Au nom du Christ.

Côte d’Ivoire is also a location for the shooting of international films, the best-known examples being Black and White in Color (La Victoire en chantant) (1976) by Jean Jacques Annaud, French Fried Vacation (Les Bronzés) (1978) by Patrice Leconte, and the Disney documentary Chimpanzee (2012). In spite of a certain effervescence in film production in recent years thanks to the development of digital technology, production of works for the big screen has not greatly changed. ONACCI statistics for the period 2017 to 2019, indicate that, on average, the office grants about 50 filming permits per year. But barely 2 or 3 permits concern film shoots, the rest being shoots for series and other products for television.

On the other hand, a new dynamic has emerged in the last few years in the field of animated films. Indeed, several studios are producing content that is recognized for its storytelling qualities and animation techniques, such as Afrikatoon, which produced Pokou (2013), the first West African animated feature film, Ka Studios and Sinanimation Studios.

**TELEVISION AND VIDEO**

There are many promising young film-makers in Côte d’Ivoire, who are perfecting their art and technique by filming videos clips, weddings or corporate content.

Since 2014, the RTI group (Radiodiffusion Télévision Ivoirienne) has positioned itself on the Ivorian film and audiovisual market, creating the entities RTI Production, responsible for developing and improving the quality of Ivorian productions through the promotion of co-production, and RTI Distribution, responsible for marketing and exporting audiovisual and film products made in Côte d’Ivoire. The huge success of its legendary television serial Ma famille (2002)19, revitalized a sector that at the time was in a difficult situation. Since then, other series with great popular success have been regularly broadcast by one of the two national channels, notably Nafi, Histoire d’une vie, Class A, Sah Sandra, Dr Boris, Teenager and Sibbois.

The public’s enthusiasm for television productions of this kind has in turn encouraged other telecommunications companies to try their hand. The Canal+ group via its A+ Ivoirienne channel, an entertainment channel specially designed for Côte d’Ivoire and available free of charge via DTT and in the Les Bouquets Canal+ multichannel package, is thus investing in the purchase of numerous series such as Ma Grande Famille, L’Or de Ninkinanka, Karma, and Maîtresse d’un homme marié (Senegal), · the French version of which was broadcast on the A+ channel in 2020, Les coups de la vie, Les larmes de l’amour, Otages d’amour, La team des belles rebelles, Au nom de la loi and Bibata ou la cité de la passion. Two original creations by Canal+ in Africa are Invisibles, which won the prize for best francophone fiction at the La Rochelle TV Fiction Festival (Festival de la Fiction TV de la Rochelle) in 2018, and Cacao31, both by creator and director Alex Ogou. Canal+ declares its ambition to be even closer to Ivorians with programmes dedicated to them, and to become a driving force of audiovisual production in Africa.

TV5 Afrique is also involved in the production of series such as Blog, Les enfants de ma famille, Soeurs ennemies Saison 2, and Top Radio. Another example is the MTV series Shuga Babi, the Ivorian version of a format developed by the MTV Staying Alive Foundation, previous seasons of which were filmed in Nairobi, Lagos and Johannesburg.

These dynamics are leading to the birth of various production companies specializing in television content, whether series or advertising22, which constitute the majority of the more than 200 production companies registered in the country.

**DISTRIBUTION COMPANIES**

The distribution sector remains underdeveloped in Côte d’Ivoire. However, it is growing again thanks to television, after having completely disappeared in the early 2000s with the closure of cinemas. The two leading companies are the public Group RTI, through its subsidiary RTI Distribution, and the private telecommunications company Côte Ouest Audiovisuel.

RTI Distribution has the objective of promoting and marketing the RTI Group’s productions, as well as those of independent Ivorian producers. Ivorian television series have thus been broadcast internationally in both francophone and anglophone Africa. The company also gives Côte d’Ivoire a permanent presence in the major audiovisual trade fairs and markets in Africa. In 2017, RTI Distribution had a catalogue of 1,000 hours of Ivorian programmes consisting of fictional series, short films, feature films and short vignettes.
For its part, the activities of Côte Ouest Audiovisuel, although based in Abidjan, cover several Francophone African countries, and have now also included the English-speaking zone for a number of years. Its catalogue, which includes more than 20,000 hours of programmes, is not limited to Ivorian and African productions, but includes international audiovisual content with mass appeal, which the group broadcasts on the African market after it has been dubbed, which is often effected in Europe, particularly in France.

CINEMA EXHIBITION

Since 2015, the commercial screening of films in cinemas has been resumed through the Majestic Cinemas Group, which now has 4 cinemas, with a total of 6 screens, all located in the city of Abidjan. The cinemas are all equipped with the latest technology in order to guarantee projection of the same standards as European cinemas, in particular with regard to the projection of 3D films. The Majestic group, which currently has a monopoly on cinema screenings, has a total of 1,480 seats and an attendance rate of between 20 and 25% of its capacity. Its programming presents American and French blockbusters at the same time as their release in France and also grants a place to Ivorian film releases.

In 2019, the arrival of the French group Pathé is announced with the aim of launching a first multiplex in the commune of Marcory in Abidjan.

Lastly, the Palais de la Culture in Abidjan is equipped with cinemas of international standard, in general reserved for major events organized by public bodies such as the ONACCI.

BROADCAST

In Côte d’Ivoire, the market penetration of television sets continues to increase, reaching 55% of households in 2019. Most households still principally receive free-to-air (FTA) channels, with the most common means of access being direct-to-home (DTH).

The public television service Radio Télévision Ivoirienne (RTI), created in 1962, is financed by television licences, advertising and State subsidies. It works under the supervision of the Ministry of Communication. At the beginning of the 1990s, Côte d’Ivoire opted for the liberalization of its audiovisual space, authorizing private telecommunications companies to set up in the country.

The transition from analogue to digital terrestrial television (DTT), launched in 2018, stimulated the launch of several new self-service channels. Today, the country has three free public channels, RTI1, RTI2, and RTI3, three private channels, NCI, LifeTV (Voodoo Communication) and A+ Ivoire, as well as the Orange TV and Moov TV TV/Internet channels. The opening up of Ivorian audiovisual space attracted French investors. Apart from Canal+ and Orange, M6 is now also present on the market as 12.5% shareholder in Life TV.

In the pay television segment, Canal+ is clearly the dominant actor, having launched the marketing of its multichannel package in Côte d’Ivoire in 2002 and its local pay television channel A+ in 2014. Its free terrestrial channel A+ Ivoire began in 2019 with the advent of DTT. In 2020, Côte d’Ivoire ranked third in the world (just after Poland and France) in terms of the number of subscribers to Canal+ channels with 300,000 subscribers. In 2021, Canal+ also joined forces with Orange to launch a connected multimedia offer. The entry of the Chinese company Startimes into the Ivorian market in 2016 has not damaged Canal+’s dominance, but has contributed to the diversification of the services available to viewers. In 2019, Startimes also launched its pay television multichannel package on DTT. The Chinese telecommunications company now has more than 200,000 subscribers in Côte d’Ivoire. All in all, the Ivorian pay television sector has four pay multichannel packages: two satellite (Canal+ and Startimes) and two terrestrial DTT (TELNUM and Startimes) packages.

DIGITAL PLATFORMS

Côte d’Ivoire has more than 38 million mobile phone subscribers according to the Côte d’Ivoire Telecommunications Regulator (Autorité de régulation des télécommunications en Côte d’Ivoire, ARTCI), which indicates a market penetration rate of 68.9% for mobile internet, corresponding to 18 million subscribers.

VOD services have recently undergone a spectacular expansion thanks to the deployment of more than 5,000 kilometres of optical fibre on Ivorian territory. As far as international platforms are concerned, at present only Netflix and Prime Video are accessible.
Most local telecommunications companies such as RTI and the telephone network providers Orange, MTN and Moov have also launched their own VOD services. More specifically, the telephone network providers’ Mobile TV services provide multichannel packages through their telephone applications.

The vast majority of the 600,000 monthly downloads on Orange TV now concern Ivorian content. For Orange, this success justifies its growing involvement in the financing of Ivorian productions, as shown in particular by its support for the film *Night of the Kings (La Nuit des Rois)*, by Philippe Lacôte.

**FUNDING SOURCES AND MECHANISMS**

**PUBLIC FUNDS**

Since 2008, Côte d’Ivoire has established a fund for the film industry, the FONSIC,[34] which is the State’s official aid mechanism for the film industry. According to its rules and regulations, the FONSIC grants an advance on receipts, before and after production, to production companies holding a licence issued by the Côte d’Ivoire National Office for the Film Industry (ONACCI). Between 2013 and 2018 the total amount available increased from 50 to 388 million Francs CFA (US$100,000 to US$776,000) and the number of productions supported from 1 to 11 films.[35] However, as the amounts allocated by the FONSIC do not cover the whole of the production costs, some of the films and series supported remain unfinished, due to inability to complete their funding.

In 2014, the film *Run* by Philippe Lacôte received 100 million Francs CFA (US$200,000). The advance on receipts is supposed to be repayable, but industry professionals are calling for this advance to be transformed into a non-refundable subsidy.

The FONSIC is also responsible for supporting television series (about ten thus far), broadcasting and promotion, as well as encouraging and assisting the creation of training schools for film industry professions.

**INTERNATIONAL FUNDING**

Furthermore, Côte d’Ivoire has had a film co-production agreement with France since 1995.[36] The agreement provides for aid of between 20 and 80% of the cost of the production. This agreement has made it possible to support several Ivorian productions. Such is the case, for example, of certain films by the Ivorian film-maker Henri Duparc.[37]

A co-production and film industry exchange agreement was also signed in 2011 between the ONACCI and its counterpart, the Moroccan Centre for the Film Industry (Centre cinématographique marocain, CCM).

In 2020, a new financial mechanism, the CLAP ACP, granted production subsidies. This mechanism is financed by the European Union (EU) in the framework of the ACPEU Culture Programme and implemented through a partnership between FONSIC and the Francophonie Image Fund (Fonds Images de la Francophonie) of the International Organization of La Francophonie (Organisation Internationale de la Francophonie, OIF).[38] The initiative consists of adding a supplementary subsidy in the form of a bonus up to 200%, to the subsidies granted by the OIF or the FONSIC.

Another component of the same initiative provides support to selected projects through non-financial benefits, in order to enable them to be completed with greater ease, in general through the secondment of experts (specialized in contracts, production management, rewriting, casting, and other artistic and technical skills, distribution etc.).[39]

**PRIVATE FUNDING**

Private funding is scarce. Banks and other private investors do not agree to take commercial risks in a film or audiovisual project. The current state of the market does not yet allow any return on investment.

A major absence in the financing of film production seems to be television channels, which are currently thriving in Côte d’Ivoire. Neither RTI, nor the private DTT and pay television channels grant any funding for film productions. On the other hand, RTI, Canal+, and to a lesser extent Orange, regularly contribute to the financing of certain series.

**PROMOTION**

The Côte d’Ivoire National Office for the Film Industry (ONACCI), in collaboration with the Film Industry Directorate (Direction du Cinéma) of the Ministry of Culture and Francophonie, is responsible for the promotion of the film and audiovisual industry. The ONACCI is also in charge of representation of Ivorian Cinema abroad and in particular at FESPACO.

The country’s biggest film event is CLAP Ivoire, a short film festival reserved for young filmmakers from the West African Economic and Monetary Union (WAEMU), which includes 6 countries. Every two years, the ONACCI organizes a Moroccan film week, in collaboration with Morocco’s CCM. A few years ago, the actress Naky Sy Savané created the FESTILAG,[40] an international festival which has the special feature of screenings in popular neighbourhoods, in the presence of the artists. Moreover, the Ciné Droit Libre festival[41] is held every year in Abidjan, presenting films on human rights and freedom of expression. Another event highlighting Côte d’Ivoire’s film industry is the Festival de Communication des Jeunes Filmmakers (WAEMU). The event is also in charge of representation of Ivorian Cinema abroad and in particular at FESPACO.

There are at present no national events devoted to television series. On the other hand, Côte d’Ivoire is the host country of DISCOP Africa Abidjan, which is the largest audiovisual market in francophone Africa.[42] DISCOP is a job creation opportunity for young people, and a business opportunity for independent Ivorian producers. The city of Abidjan is thus seen as the hub of the audiovisual industry in francophone Africa.
EDUCATION AND TRAINING

Several public and private institutions provide training for film and audiovisual occupations.

PUBLIC INSTITUTIONS

In the public domain, the best known and most important institution is the higher educational School for theatre, film and the audiovisual industry (École supérieure de théâtre, de cinéma et de l’audiovisuel, ESTCA)⁴⁴, which exists within the higher educational Institute of the arts and cultural initiatives (Institut supérieur des arts et de l’action culturelle, INSAAC)⁴⁵. This school provides training in the specialized field of the film, multimedia and audiovisual industries. There is also a School of audiovisual production (École de production audiovisuelle, EPA-ISTC)⁴⁶ within the same institution, which provides technical-artistic training for radio, television, film and web production professions, and provides bachelor’s and master’s degrees in the fields of production management and administration, in addition to framing, editing and audiovisual and film production.

Within the framework of the Université Félix Houphouët-Boigny, the Information, Communication and Arts Training and Research Unit (Unité de formation et de recherche en information, communication et arts, UFRICA) provides bachelor’s, master’s and even doctoral programmes in film studies. This university training is essentially focused on theoretical and research aspects.

PRIVATE TRAINING

In addition, numerous private institutions provide practical training in film and audiovisual techniques, such as the Film and Audiovisual Industry Specialized School (École spécialisée Cinéma et Audiovisuel, ESCA), which provides a vocational degree course including all occupations within the industry, with a Postproduction option. Other institutions provide training for technicians in the fields of image, sound and acting.

NOTES

1. http://culture.gouv.ci
7. https://www.buridaci.com/web
12. Figures provided by the Côte d’Ivoire National Office for the Film Industry – ONACCI
15. https://www.afikatoon.com
17. http://www.findglocal.com/C/Abidjan/225191310922676/5animation
22. https://www.ivoironer.fr/productions
25. https://www.coteouest.tv/fr/a-propos-de-nous
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34. http://fonsic.ci.com
37. https://www.henriduparc.com
38. https://www.acpueculture.eu/about
40. https://www.festilag.ovh
44. https://insaac.edu.ci
and online media productions are in accordance with ethics and the laws and regulations of the Republic.\(^1\)

**FILM AND AUDIOVISUAL POLICY**

The DRC does not have a specific film and audiovisual policy. Ministerial Decree No. 035/2011 of 14 June 2011 modifies and complements Decree 04/MIP/020/96 on implementing measure for Law 96-002 of 22 June 1996 and sets the terms and conditions for the exercise of press freedom for audiovisual media companies.\(^2\) However, the decree only concerns music and entertainment. No direct mention is made of the film and audiovisual industry.

**COPYRIGHT PROTECTION AND PIRACY**

The Congolese Society of Copyright and Neighbouring Rights (Société Congolaise des Droits d’Auteurs et Droits Voisins, SOCODA)\(^3\) created in March 2011 is tasked with overseeing the use, administration and management of all copyright and related rights in the DRC.

**PRODUCTION**

Despite the limited data available, stakeholders report an upsurge in filming and recording of images throughout the country in recent years, whether it be for weddings and different ceremonies, videos for artists, political meetings or more organised productions.\(^4\)

**FILM**

From 1965 to 1997, a few pioneers of cinema introduced a more artistic approach than the earlier film productions. The film *Life is Rosy (La Vie est Belle*, 1987) by Mweze Ngangura constitutes a major turning point in film production in the DRC.

In the 1990-2000s, a new wave of filmmakers emerged such as Balufu Bakupa-Kanyinga, Joseph Kumbela, Kibushi Ndjate, Zeka Laplaine, Monique Phoba Mbeka and Guy Bobanya. This generation was followed by another wave of young talents such as Djo Tunda wa Mung’a, Petna Ndaliko Katondolo, Sandra Boukhany, Gilbert Balufu and Claude Nzeba Hafner\(^4\), who occupied the film creation scene.

Several production companies have emerged in the capital in the last decade, including Les Films de l’Oeil Sauvage, Bimpa Productions, Tosala Films, Image-Drama, Ngulungu Productions, MatrixR, FixerCongo Productions, Safari Pictures, Lelo-Lobi NMW, Genjutsu, and Kimpa Vita Films.\(^5\)


The projects that have had the greatest impact on the local industry are probably *Congo in 4 Acts* (2009, *Congo en 4 actes*), a series of four short documentaries by Dieudo Hamadi, Kiripi Katembo and Divita Wa Lusala, and *Viva Riva!* (2011) by Djo Munga, both of which attracted international attention and were accompanied by training sessions on the ground.

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\(^1\) Nzeba Hafner, who occupied the film creation scene.
\(^2\) The decree only concerns music and entertainment.
\(^3\) The Congolese Society of Copyright and Neighbouring Rights (Société Congolaise des Droits d’Auteurs et Droits Voisins, SOCODA)
\(^4\) This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

**INSTITUTIONAL FRAMEWORK**

**MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS**

The High Council for the Audiovisual and Communications Industry (Conseil Supérieur de l’Audiovisuel et de la Communication, CSAC) is in charge of regulating the media and is responsible, inter alia, for ensuring that radio, television, cinema, written press and online media productions are in accordance with ethics and the laws and regulations of the Republic.\(^1\)

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Outside of the capital Kinshasa, the city of Goma has sparked enormous interest in cinema as a result of the influence of Tanzanian films, which have occupied the local market since the early 2000s. For example, the ‘Goma, Cinema Capital’ project (Goma capitale du cinéma), created in 2015 by Modogo Muthembwi, aims to contribute to the emergence of Congolese cinema and support the dynamics of filmmakers.

**TELEVISION AND VIDEO**

Despite the proliferation of channels that followed the liberalisation of the press in 1992, the programmes broadcast present little diversity and provide very little local content, except where the “maboke” system is used, which consists of producers paying channels to broadcast their content.

However, the new generation of Congolese film industry professionals is increasingly devoting itself to the production of television programmes and series. Some of these productions have been broadcast internationally on television channels like TV5 and A+, such as Mpangi’Ami (2015) by Didace Kawang Kapang, Nda Kisa (2017) by Patrick Ken Kalala, Équipe (2010-2012) by Patrick Ken Kalala, and Zora (2013) by Lengol Yohane.

The production of videos for commercials, weddings and corporate films is very dynamic and generates a large number of jobs for young people. However, it remains difficult to quantify in the absence of data.

**DISTRIBUTION, EXHIBITION AND BROADCAST**

**CINEMA EXHIBITION**

The last cinemas in the DRC disappeared in the early 2000s. However, in 2016 Cinékin opened a four-screen cinema, which principally shows American films. The high admission price and the venue’s location in an affluent neighbourhood mean that it is barely accessible to the general public. Ciné na biso (Our Cinema) was launched three years ago, and aims to build 20 small cinemas for all classes. It plans to show Congolese and foreign films.

In the meantime, screenings principally take place in foreign cultural centres. Image-Drama is a production and theatre company, created in 2010 by director Patrick Ken Kala, which organises weekly screenings of local and international films, followed by a debate. The ‘Un Cinéma Pour le Congo’ platform also holds a weekly film club with free screenings at the Maison des Savoirs cultural centre in Kinshasa.

In Lubumbashi, screenings are principally held at the Institut Français of Lubumbashi/ Halle de l’étoile, the Wallonie-Bruxelles centre in Lubumbashi, the Waza art centre and the Picha art centre. Whereas in Goma, film screenings take place in the open air at the Yole Afrika! Centre as well as at the Institut Français.

**BROADCAST**

The market penetration of television sets is increasing at a slow pace among households, reaching around 18% in 2019. The vast majority of households still only receive free-to-air channels. Full transition from analogue television to Digital Terrestrial Television (DTT) launched in 2015 was completed in 2020. After the advent of digital television, statistics indicate that there are more than 200 publishers of programmes, the majority of which are established without complying with standards and do not appear to be viable. For the National Satellite Telecommunication Network of the DRC (Réseau National de Télécommunication par Satellite de la RDC, RENATELSAT), the transition constitutes a major step to ensure better image quality and the broadcasting of programmes in high-definition television.

There are almost a hundred television channels in the country as a whole. RTNC1 and RTNC2 are the two public channels. The international actors Canal+ and StarTimes have captured the largest share of the pay television market, competing with a range of local DTT, MMDS and DTH services.

The SVOD market is dominated by iROKO+, a joint venture between the Nollywood iROKO studio and Canal+. Trace Play is the principal challenger. Many authors also use YouTube and Vimeo in order to show their films to the public. There are also a few local VOD platforms including Dab Entertainment, and Bilili, a service specialising in short films from the Maziwa Makuu Films distribution company. The ‘Un Cinéma Pour le Congo’ platform is also planning to launch its own VOD service.

**DIGITAL PLATFORMS**

Mobile market penetration reached 44% of the population of the DRC in 2019. The market is shared between four operators: Africell, Airtel, Orange and Vodacom, which launched the first 4G network in 2018. 41% of mobile subscribers had access to the internet via their mobiles in 2019.

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FUNDING SOURCES AND MECHANISMS

Consultations with stakeholders indicate that there is no public funding system devoted to cinema.

Industry professionals rely on private funding, including their own funds and corporate sponsorship. Indeed, many filmmakers make commissioned films for NGOs, commercials and TV programmes, and inject the profits thus made into more creative projects. In Kinshasa, the new generation operates on the Lisungi (“help” in Lingala) model, in which artists mutually help each other free of charge to support their production initiatives in order to bring films into existence. Advertising placements and contributions from private investors are also becoming increasingly important.

Lastly, another source of funding comes from international grants and foreign investors generally speaking.

PROMOTION

The Congo International Film Festival (CIFF), founded in 2005 in Goma by the filmmaker Petna Ndaliko Katondolo and organised by Yolé! Africa and Alkebu Film Productions, was the first international film festival in the DRC. The other two notable festivals include the Kinshasa Film Festival (Festival du Film de Kinshasa, Fickin), created in 2014 thanks to the support of international partners and initiated by the producer and director Tshoper Kabambi, and the CINEF Women’s Film Festival (Festival cinéma au Féminin), dedicated to works created by women filmmakers, also launched in 2014, by the director and producer Clarisse Muvuba.

The Mongita awards, created in 2017 by Éric Kayembe via his “Un Cinéma Pour le Congo” platform, is a ceremony which celebrates film industry professionals in DRC every year.

In Lubumbashi, the Kidogo Kidogo Films Festival (Festival Kidogo Kidogo Films) also aims to provide a venue for meetings and exchanges between professionals in the film world, providing a range of activities such as workshops, masterclasses and professional meetings. And in Bukavu, the Great Lakes International Film Festival (Festival International du Cinéma Grands lacs, FICGLAsbl) is in its second edition.

EDUCATION AND TRAINING

The National Institute of Arts in Kinshasa (Institut national des Arts de Kinshasa, INA), the only institution of a high technical, academic and artistic level in Central Africa, has no training courses in the cinema and audiovisual industry.

The Academy of Fine Arts (Académie des Beaux-Arts) in Kinshasa has a department of visual communication, into which a Photography and Media department has recently been incorporated. Some young graduates go on to work in the film industry.

The lack of training leading to qualifications in the field of cinema is partly offset for by a large number of short training courses organised on an occasional basis by European cultural centres (Institut Français, Goethe-Institut, Fédération Wallonie-Bruxelles) and by private actors. Between 2008 and 2015, Suka, an initiative undertaken by the filmmaker Djo Munga, in collaboration with the Belgian INSAS film school, made it possible to train different generations of filmmakers. The Fickin workshops, initiated by Bimpa Production with the support of the American Language Institute, provide students with support for the making of their first short film. Image-Drama, created by the director Patrick Ken Kala in 2010, is a production and theatre company in Kinshasha, which organises three-month courses in filmmaking every year. The Ciné Congo workshops, for their part, are organised by Eric Kayembe and focus on scriptwriting. Lastly, ALT2TV by Yole Afrika! in Goma aims to develop a new generation of Congolese activists and filmmakers, who are able to both create awareness through films and professionalise the film industry within the community.

NOTES

17. https://yoleafrica.org/
DJIBOUTI

- Population: 1.1 million
- GDP per capita: US$ 5,519
- Median age: 26.6 years
- Urban population: 77.9%
- Rural population with access to electricity: 23.8%
- Mobile phone subscription: 41.2%
- Internet users: 55.7%
- Female upper secondary education completion rate: 15%


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The Ministry of Muslim Affairs, Culture and Waqf Assets elaborates and implements the government’s policy on the organization, the promotion of cultural initiatives, the enhancement of heritage and the development of Waqf assets. Among its missions, the Ministry is responsible for the “development of the cultural industries”.1 Within this Ministry is the Djiboutian Institute of Arts and Film (IDAC, Institut Djiboutien des Arts et de Cinématographie), a body that ensures the “implementation of State policy for the development of the film sector and contributing to the promotion of Djiboutian films shot on national territory and abroad”.2 The IDAC, created in 2020, is also responsible for artistic training and national capacity-building in the fields of arts and culture, giving its opinion on all issues of artistic training initiated by the specialized departments of public education. Finally, IDAC’s missions extend to the development of Djibouti’s tourist potential and the diversity of its landscapes by encouraging exchanges between film industry professionals and expanding the co-production of films with foreign partners.

Radio Television of Djibouti (Radiodiffusion Télévision de Djibouti, RTD), a public institution created by law no. 42/AN/99/4 of 1999, is placed under the supervision of the Minister of Communication and Culture, who is responsible for defining RTD’s overall policy. The only existing association on the territory of Djibouti is the Audiovisual Association of the Horn of Africa (Association audiovisuelle de la Corne de l’Afrique) founded by the director Lula Ali Ismail.

FILM AND AUDIOVISUAL POLICY

The only identified law concerning the sector dates from 1992² (Law n° 2/AN/92/2el concerning freedom of communication), chapter VI of which sets common provisions with reference to the audiovisual sector, while chapter VII sets general standards for the public audiovisual sector and chapter VIII sets general standards for the private audiovisual sector.

COPYRIGHT PROTECTION AND PIRACY

Stakeholders estimate that less than 25% of the income from the film and audiovisual industry is lost due to piracy in Djibouti. Law no. 154/AN/06 of 23 July 2006 concerning the protection of copyright and related rights sets the legal framework for the protection of authors⁴.

Djibouti ratified the Berne Convention for the Protection of Literary and Artistic Works in February 2002 and acceded to the WIPO Copyright Treaty in 2002⁵, the Beijing Treaty on Audiovisual Performances in 2012 and the Marrakesh Treaty in 2013.

The Djibouti Office of Copyright and Related Rights (Office Djiboutien des Droits d’Auteur et Droits Voisins, ODDA) is a public administrative and cultural institution. It is the only collective management organization and the first of its kind in Djibouti. Membership of the ODDA is required in order to obtain a licence and thus have the benefit of its services in accordance with the Berne Convention.

PRODUCTION

The stakeholders only list two production companies active in Djibouti.

FILM

The Djiboutian film industry is very recent in a country where the film industry struggles to exist. In March 2000, a UNESCO survey⁶ indicated that Djibouti produced no films between 1988 and 1998. The national productions of Lula Ali Ismail, Khaadar Ahmed, Saad Houssein Meraneh, Nabil Dorani and Aïcha Mohamed Robleh are remarkable exceptions.⁷ In particular, the filmmaker Lula Ismail Ismail, who directed and starred in the short film Loan in 2011 and directed her first feature film in 2019, Dhalinyaro⁸, which is considered to be the first Djiboutian feature film and was acclaimed at various festivals. Both are stories about women and girls.⁹ Not to mention Khader Ahmed, with his feature film The Gravedigger, a Finnish production jointly-produced with Germany and France, selected at the Marrakesh Film Festival’s Atlas Workshops in 2019.¹⁰

TELEVISION AND VIDEO

Many small organizations share the dynamic market of corporate videos, music videos and family and other events. RTD, Djibouti’s public television company, which has 3 channels, has no relationship with local production apart from television advertising.
**DISTRIBUTION, EXHIBITION AND BROADCAST**

**CINEMA EXHIBITION**

There are seven cinemas in the country. The rare Djiboutian films are screened in the Institut Français.12

**BROADCAST**

Television viewing has increased over the years in Djibouti, reaching about 55% of households in 2019. Most access is provided via direct-to-home (DTH) satellite, principally in the form of free-to-air (FTA) reception. The digital transition was completed in 2016. The Radio Télévision de Djibouti (Radiodiffusion Télévision de Djibouti, RTD)13 was created in 1986. It broadcasts on three channels, namely Channel 1, in Arabic and French, Channel 2, exclusively in Somali, and Channel 3, exclusively in Afar.13 No privately-owned or independent media outlet is recorded within the country.14 In the pay television segment, the international telecommunications companies Canal+ and DStv (MultiChoice) are in competition with a few local players.15

**DIGITAL PLATFORMS**

Mobile use reached 40% of the population in 2019 with16 the entire market in the hands of a single network provider, the state-owned company Djibouti Telecom. 40% of mobile subscribers had access to the Internet via their mobile in 2019, partly offsetting the low rate of access to fixed broadband services.17 The World Bank reports that 56% of the population were internet subscribers in 2017.18 The Netflix and Showmax platforms are available to an insufficient number of subscribers.

**FUNDING SOURCES AND MECHANISMS**

There are no known sources and/or mechanisms of public funding. Projects from the Republic of Djibouti are eligible for international funds such as the Fonds Jeune Création Francophone (FJCF)19 and the Aide aux cinémas du monde (ACM)20, as well as the “DEENTAL – ACP” programme, a mechanism that enables the awarding of financial bonuses to projects conducted via joint production between several ACP countries that are beneficiaries of the FJCF and/or ACM.

For the vast majority, funding is obtained via sponsorship from commercial brands and other private sources.

**PROMOTION**

Two film events have been organized on the initiative of the Institut Français of Djibouti, namely the “Djibouti fait son cinema”21 festival and the European Union Film festival.22 The filmmaker Lula Ali Ismail is organizing the first local edition of the Très Court International Film Festival, which is in its 23rd year at the international level. The event has taken place in June 2021.

**EDUCATION AND TRAINING**

The University of Djibouti-Directorate of Technology Studies (Université de Djibouti -Direction des Études des Technologies)23 provides students of DUT-TAV (Audiovisual Techniques) with training in scriptwriting, directing, production, camerawork and lighting, sound recording, animation and mixing, leading to a degree.

In 2018, the Hani Farsi School Fund (fonds scolaire Hani Farsi) launched a filmmaking scholarship for Arab women, and Djibouti is among the eligible countries.24 The Islamic Development Bank’s IsDB-ISFD25 Vocational Education Training programme provides training scholarships for Djiboutians in certain specialized audiovisual technical professions (image, sound, installation) in member countries who have signed an agreement with the IDB (Malaysia, Morocco, Tunisia and Turkey, the National University of Uzbekistan and Tashkent University of Information Technologies). The Audiovisual Club of the University of Djibouti (Club Audiovisuel de l’Université de Djibouti) has created a space for practical training in the fields of filming and sound recording, montage and postproduction, maintenance of audiovisual equipment and production, through the organization of short workshops.

**NOTES**

EGYPT

Population: 120.8 million
GDP per capita: US$ 11,763
Median age: 24.6 years
Urban population: 42.7%
Rural population with access to electricity: not available
Mobile phone subscription: 95.3%
Internet users: 46.9%
Female upper secondary education completion rate: 41%


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The Egyptian film and audiovisual industry falls under the responsibility of the Ministry of Culture. The ministry manages all aspects of arts and culture under its departments which includes the Egyptian Arts Academy, the Department of Applied Arts and the Fine Arts Sector, among others.

Egypt does not have a film commission. However, the National Film Centre (CNC) founded in 1980 keeps an archive of films produced in the country through its department of national film archive. The Centre is also dedicated to activities in production, regional and international promotion of Egyptian films, and preservation of original copies as work of art and historical documents.

The Egyptian Film Writers Association is the most renowned film association in Egypt. The broadcast industry operates under Law 92 of 2016 that states the establishment of the Supreme Council for Media Regulation (SCMR) to regulate the public and private media sectors. The National Media Council (NMC) is responsible for all state radio and television broadcasting, under the Egyptian Radio and Television Union (ERTU).

The terrestrial television system operates under government supervision, leaving the private stations to operate only via satellite. Licences are issued and frequencies are assigned through the General Authority for Investment (GAFI) which is affiliated to the Ministry of Investment, and therefore is still part of the government. According to Law 92 of 2016, the SCMR should be responsible for issuing broadcasting licenses. The regulation of telecommunication activities and the management of the frequency spectrum are within the powers of the National Telecommunication Regulatory Authority (NTRA) under the Telecommunication Regulation Law of 2003. The law determines the composition of NTRA, the licencing conditions, the spectrum management, the status of the national telecommunication company Telecom Egypt and the safety measures.

COPYRIGHT PROTECTION AND PIRACY

Practitioners estimate that Egypt loses 50-75% of its film and audiovisual revenue due to piracy.

Copyright is protected in Egypt through international agreements, the law on the “Protection of Intellectual Property Rights” No. 82/2002, (the Copyright Law), as well as other legislation related to enforcement of copyright or affecting copyright protection. The protection of Copyright and Neighboring Rights is provided for in Articles 138 to 188 (Book 3) of the Copyright Law of 2002, the Prime Ministerial Decree No. 497 of 2005 (in Arabic), and the Prime Ministerial Decree No. 2202 of 2006 (in Arabic).

Officials of the Information Technology Industry Development Authority (at the Ministry of Communication and Information Technology), the Ministry of Culture, and customs officials are the competent authorities responsible for enforcing the copyright law and combating piracy in Egypt.

The Society of Authors, Composers and Publishers of the Arab Republic of Egypt is a multi-disciplinary collective management body. It manages the interests of various foreign collective management bodies on the Egyptian territory.

PRODUCTION

According to the Egyptian Center for Economic Studies (ECES), the film and audiovisual industry employs at least 500,000 people, 40% of whom are on fixed contracts, while the Ministry of Culture puts forward the figure of 4,500 indirect jobs created.
On the basis of data collected at the Chamber of Film Industry, the film market in Egypt includes over 200 active companies in film production and distribution. Women carter for between 20-30% of those employed in the cinema and audiovisual industry.

In 2019, the Egyptian film industry made 33 movies, earning US$72 million, according to an ECES report. The figure is less than in previous years when Egypt produced up to 45 films.

**FILM**

The Egyptian cinema industry began in Alexandria in January 1896, with the first screening of a film in Egypt at Zawani Cafe. A few days later, the films of the Lumière Brothers were shown in cafes in Alexandria and Cairo, soon after their debut in Europe. Between 1930 and 1936, various small studios produced at least 44 feature films. In June 1907, the first short documentary film was produced. In 1917, director Mohamed Karim established a production company in Alexandria. The company produced two films: *Dead Flowers and Honor the Bedouin* (1918).

Since then, more than 4,000 films have been produced in Egypt, three quarters of the total Arab production. Some of the famous films include *The Night of Counting the Years* (1969), *Cairo Station* (1958) and *The Postman* (1997). In consequence, the country benefits from solid film infrastructure. In February 2000, the government designed the Egyptian Media Production Company (EMPC) as a major film and audiovisual institution in the Near-East. It houses five large live broadcasting studios, shooting studios as well as technical support centres. In 2010, the company had 69 studios among which 66 were rented to companies, including artistic production companies, and to Egyptian and Arab satellite channel owners broadcasting from the City.

Egyptian cinema has distinguished itself over the years, and counts many prominent directors and producers whose films have gained international recognition. Adel Adeeb is one renowned filmmaker who has produced three blockbusters: *Morgan (2007)*, *Baby Doll Night* and *The Yacoubian Building* (2006), based on the best-selling novel by Alaa El-Aswany. Other notable films include Hesham Issawi’s *Heliopolis* (2009) and *Cairo Exit* (2010), which screened at the Tribeca Film Festival, and Amr Salama’s *Excuse My French* (2014) was the top grossing local film in Egypt for three weeks in 2014.

*The Square* (2013), directed by Egyptian-American Jehane Noujaim, was the first feature documentary by a half Egyptian to be nominated in the Oscar’s best feature documentary (production). The film is currently available on Netflix.
Other prominent directors, including Youssef Chahine, Abu Bakr Shawky and Mohamed Diab, have also represented Egyptian cinema in international film festivals such as Cannes, Venice and Toronto. Director and cinematographer Mohamed Siam’s films Whose Country? (2016) and Amal (2017) have screened at the New York Film Festival and won the Jury Prize at the 25th Sheffield Doc/Fest in 2018, respectively. Siam has received several international grants and prizes in support of his films including his latest project, Carnival, which recently secured funding from Cinéfondation’s Atelier, a Cannes International Film Festival initiative.

Egypt has been used as a film location for major international productions, thanks to its unparalleled historic heritage sites including the Pyramids of Giza, the Great Sphinx, the Valley of the Kings and the Tombs of the Nobles. Among international blockbusters filmed in Egypt are Transformers: Revenge of the Fallen (2009), Malcolm X (1992) featuring Denzel Washington, Marvel’s Fantastic Four: Rise of the Silver Surfer (2004), The Ten Commandments (1956) and James Bond’s The Spy Who Loved Me (1997).

A few Egyptian actors have had an international career, such as Egyptian-American Remi Malek, winner of a Best Actor Academy Award for his role as Freddie Mercury in Bohemian Rhapsody (2018), Ramy Youssef, Zeeko Zaki (FBI), Omar Metwally, Yasmine Al Massri (Quantico), and Mena (Disney’s 2019 Aladdin). Egypt was once at the forefront of the film industry, not just regionally, but internationally.

TELEVISION AND VIDEO

In Egypt, like in the rest of the Arab world, the majority of TV series are produced when viewing rates reach their peak and advertising revenues soar. During Ramadan, channels pay approximately three times as much for content compared to the rest of the year. Famous Egyptian actor and comedian Adel Imam alone was paid US$4.7 million for his role in Ostaz wa Rayees Qasem. In 2015 the combined production costs for all the Egyptian TV series reached about US$149.9 million. In terms of networks, MBC Masr, a Saudi-owned free-to-air channel that offers programming tailored to the Egyptian market, has been particularly successful, with viewing figures reaching 70 million during this period.

Over 50 shows used to air during the season in Egypt. However, the output has been somewhat inconsistent in recent years due to changes to the TV production ecosystem. Production company Square Media is airing shows during the offseason, such as the 2018/2019 family comedy serial Abou El Arousat (Father of the Bride).

The VOD market is also growing rapidly in Egypt and streaming platforms have started investing in local content, providing new avenues for producers. Netflix’s found success with local horror series Paranormal, while Viu recently financed an original drama called Zodiac, a 15-part thriller about university students who find themselves the target of a curse.

DISTRIBUTION, EXHIBITION AND BROADCAST

DISTRIBUTION COMPANIES

A handful of firms have historically controlled the vast majority of film distribution in Egypt. In 2010, the Egyptian Competition Authority accused two companies, which controlled 95% of the Egyptian film market, according to the ECA, of engaging in anticompetitive behavior by only showing their own films in their movie houses. These same firms also run the bulk of cinema production in Egypt.

CINEMA EXHIBITION

There are over 480 cinema screens in Egypt. The country has a long history with the silver screen, and usually cinema fans will queue outside movie houses for the latest romantic comedy, drama or action flick. Due to the pandemic, major releases were put on hold indefinitely.

Cairo also counts a few alternative movie houses. Zawya (‘angle’) opened in March 2014 in a 175-seat second-floor theater in downtown’s Cinema Odeon.
channels were launched after the 2011 stake in both channels. But many and the government had a financial government officials. In 2002, there stations, over 40 according to There are also many private satellite channels is broadcast to Greater Cairo. channel (Channel 3) of the regional main foreign language channel. 39 Egypt. The state-owned Nile TV is the main channels and broadcast across the region through satellite.

The Egyptian Radio and Television Union, a government entity, owns all 17 terrestrial channels. Channel 1 and Channel 2 are the network’s main channels and broadcast across Egypt. The state-owned Nile TV is the main foreign language channel. The government also owns 23 other channels across the country. There are six regional terrestrial channels, which used to all be broadcast to Greater Cairo, but as of 2007, only Greater Cairo channel (Channel 3) of the regional channels is broadcast to Greater Cairo.

There are also many private satellite stations, over 40 according to government officials. In 2002, there were only two, Al-Mehwar and Dream, and the government had a financial stake in both channels. But many channels were launched after the 2011 revolution, including Capital Broadcast Center, Al Nahar and TEN, which have managed to attract significant viewership. Rotana launched Rotana Masrinya, a channel broadcasting programmes aimed at the Egyptian market. Others include the Cairo Broadcasting Corporation - CBC (2011), On E (2016) and the DMC network (2017).

Pay TV offers struggle to emerge in a market marked by rampant piracy and by the dominance of free-to-air (FTA) satellite services. The premium pay TV actors beIN and OSN lead the market in 2019, followed by recently launched offers from Orange and My-HD.

DIGITAL PLATFORMS

There were 59.19 million internet users in Egypt in January 2021, with a 57.3% internet penetration, while mobile phone users were at 97.75 million, equivalent to 92.7% of the total population.

The Egyptian SVOD market is dominated by Starz Play (Lionsgate). Competitors consist of US-based services like Apple TV+, Netflix and Amazon Prime Video, Arabic ones like BeIN Connect, Shahid Plus (MBC Group) and Istdikana (Arab Media Network) or Asian-based like Viu (PCCW) and Weyyak (Zee Entertainment).

Lockdowns have boosted the adoption of online streaming services. In early May, government-affiliated United Group for Media Services launched paid streaming app WatchIT. Digital payment and financial inclusion levels are low in the country. Since then WatchIT has become one of the biggest players. The service saw a large increase of its subscription base following the March 2020 launch of its #stayhome promotion. During Ramadan, the service, which already boasts more than 65,000 hours of online content, acquired multiple top series and TV shows. The Ramadan season brought an 89% increase in daily active users.

Other local VOD platforms include masrawy.com owned by the Egyptian telecommunication group Orascom Telecom Holding. A few Egyptian broadcasters have also created branded channels on YouTube. In 2010, ON TV launched its channel which gives access to the live service as well as to a catch up catalogue.

In 2020, the Cinema Industry Chamber’s banned the movie Saheb Al Maqam from being shown in theaters because it was first streamed on Shahid.net, owned by the Saudi MBC Group, making it the first Egyptian movie to premiere on a digital platform before its theater release. Other Egyptian films which premiered on streaming services in 2020 include El-Hareth and Bloodline on Shahid.net, and Secrets of the Saqqara Tomb on Netflix.

FUNDING SOURCES AND MECHANISMS

Funding is a big challenge for Egyptians producers, especially due to ever-increasing labour and technical costs, and the star-culture which means that popular actors now command exceedingly high rates.

A few regional funds support Egyptian filmmakers, who can access funding through the Via Short Films Production Funding offered by Cairo International Film Festival, and the Arab Fund for Arts and Culture. Private entities and NGOs that offer funding to Egyptian filmmakers include the Doha Film Institute Grants Program, the Red Sea Fund, and the European Union.

However, producers report that it is not very efficient to produce films by securing funding in the MENA region, and that funding from international bodies typically do not cover the entire cost of the production. In the absence of national funding for local, mainstream or indie cinema, Egyptian filmmakers are often forced to raise financing for their own productions through partnerships, pre-licensing rights outside Egypt, and other innovative means, often relying on small budgets and individual investors.
Filmmaking in Egypt is not as lucrative as television series, and the profit cycle is far slower. The box office often covers only a fraction of returns, which often don’t even yield enough for the project to reach the breakeven point. Satellite channels then purchase the films’ viewership rights, which means it could take film producers several years to generate significant returns on their projects.

Despite the financial woes of Egypt’s film industry, there does seem to be a glimmer of hope for its prospective profitability.

PROMOTION

Since 1976, the capital has held the annual Cairo International Film Festival, which has been accredited by the International Federation of Film Producers Associations. The growth of the VOD market has recently spurred the festival to launch its TV Pitch Market, in partnership with the Middle East Media Initiative (MEMI), a University of Southern California-based exchange programme backed by the U.S. State Department and Middle East TV industry partners. Another prominent event is the Luxor African Film Festival, organised since 2012 by the Independent Shabab Foundation (ISF), which has also established three cinema clubs for African cinema in Cairo, Alexandria and Luxor in cooperation with the Ministry of Culture.

Other festivals include the El Gouna Film Festival, which strives to be a catalyst for the development of cinema in the Arab world, the Alexandria Film Festival, the Luxor Arabian & European Film Festival organized by Noon Foundation for Culture and Arts (NOONCA) with the contribution of the Egyptian Ministry of Culture and various public and private organizations, the Downtown Contemporary Arts Festival, the Ismailia International Film Festival for documentary and short films, and the Aswan International Women Film Festival.

EDUCATION AND TRAINING

Official numbers show that over 800 students graduate every year from film and audiovisual training programmes.

PUBLIC UNIVERSITIES

Founded in 1959, the Higher Institute of Cinema is a public university funded by the government. It is the first and oldest school for cinema in the Middle East. The university attracts students from all Arab countries, and almost ninety percent of professionals working in Egyptian Cinema field are graduates from the school. The institution offers degree and diploma courses in camera, editing, sound engineering, visual effects and production.

PRIVATE UNIVERSITIES

Private universities offering degree and diploma in film courses include the American University in Cairo which will take in its first students in 2022, ZFilmmers, the Arab Film School, the Cairo Film School, and the Arab Cinema Center.
EQUATORIAL GUINEA

Population: 1.9 million
GDP per capita: US$ 18,558
Median age: 22.3 years
Urban population: 72.6%
Rural population with access to electricity: 6.6%
Mobile phone subscription: 45.2%
Internet users: 26.2%
Female upper secondary education completion rate: 3%


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The Ministry of Information, Press and Radio oversees the television sector, while the Ministry of Culture, Tourism and for the Promotion of Handicrafts, which includes a Directorate-General of cultural centres, cinemas and theatre, is the institution in charge of overseeing the film and audiovisual sectors as well as related activities such as advertising.

The Equatorial Guinea Film Association (Association Cinématothegraphique de Guinée Equatoriale, ACIGE), remains the principal institution representing filmmakers and producers.

FILM AND AUDIOVISUAL POLICY

Consultations with various stakeholders indicate that it there is no established policy in this field. The initiatives that do take place are authorised on a case-by-case basis by the Ministry responsible.

COPYRIGHT PROTECTION AND PIRACY

According to the information collected, there is no law regulating copyright and piracy, however Equatorial Guinea has ratified agreements with the World Intellectual Property Organization (WIPO). The Ministry of Culture, Tourism and for the Promotion of Handicrafts (Directorate-General of Performing Arts, Creative Industries and Copyright) and the Council for Scientific and Technological Research (CICTE) are responsible for regulating the areas relating to intellectual property law.

PRODUCTION

FILM

After Equatorial Guinea’s independence in 1968, the first film, entitled El Tesoro, was made with the participation of several young filmmakers.

The film Marfil, directed by Rubén Monsuy Ndong, tells the story of the reopening of the Marfil cinema in 2011 during the 2nd African Film Festival in Equatorial Guinea. The characters portrayed tell how cinema has been and is present in their lives. In 2016, Palmaras en La Nieve, by Spanish director Fernando González Molina, was largely shot in Equatorial Guinea. It was a large-scale production that required the construction of sets, more than 70 actors, some 250 technicians and 2,200 extras. As part of the filming, the development of Equatorial Guinea’s potential for positioning itself internationally as a shooting location for the film industry was discussed.


TELEVISION AND VIDEO

The public television channel Télévisión de Guinea Ecuatorial (TVGE) produced the documentary Orígenes y descendientes by Pedro Mbá Ndong (2016) on the origins of Equatorial Guinean society. TVGE broadcasts the few pieces of local content that exist. It should be noted that within the framework of the Patrimonio Guiné 2020 project, videos of a maximum length of one minute are broadcast, in which people of all ages talk about the importance of cinema in their lives and their relationship with Equatorial Guinea’s old historic cinemas.

DISTRIBUTION, EXHIBITION AND BROADCAST

CINEMA EXHIBITION

There are no working cinemas. Cinema screenings and shows take place in the rooms of the Spanish cultural centres in Malabo and Bata.
BROADCAST

Television viewing has increased over the years, reaching around 72% of households in 2019. Almost all access is provided by terrestrial analogue broadcasting with open reception. The public television channel TVGE (Televisión de Guinea Ecuatorial), which broadcasts in Spanish, is part of the national public media group which includes radio and television, under the supervision of the Ministry of Information, Press and Radio. It has been broadcasting internationally since 2011 via streaming on its website. Asonga is the country’s only private television station.

The international telecommunications companies Canal+ and DStv (MultiChoice) share the pay television market.

DIGITAL PLATFORMS

Fixed broadband remains limited in Equatorial Guinea, with 1.9% of households having internet access via a fixed connection in 2019. Mobile internet will probably remain the principal means of access due to the low level of electrification, lack of internet infrastructures and associated costs. TVGE has a VOD platform providing documentaries, entertainment and fashion programmes and news. Access to the platform is free and available on the television station’s website. Access to OTT platforms such as Netflix is only possible from IPs outside of the territory of Equatorial Guinea and is dependent upon users’ purchasing power.

FUNDING SOURCES AND MECHANISMS

The Spanish Ministry of Foreign Affairs remains one of the most important forms of funding, through the Spanish cultural centres in Bata and Malabo, with the ACIGE in particular. Several embassies, namely Spain, France, Germany, the United States of America, Senegal, Cuba and Venezuela, also finance initiatives that form part of ACIGE’s activities. Private companies (Marathon, Camaron and Total GE) have also made important contributions to ACIGE’s work. The international organisations UNICEF, UNDP, UNFPA and UNAIDS occasionally contribute to the provision of support to the sector.

The production of the Spanish feature film Palmeras en la nieve, partially shot in Equatorial Guinea, was financed by Atresmedia, Movistar +, COSMO and Warner Bros Pictures España.
The National Library of Equatorial Guinea also financed the film Teresa (2010), by the filmmaker Juan Pablo Ebang Esono.

**PROMOTION**

The Spanish cultural centres began developing cooperation programmes 40 years ago, which at that time even included a network of community venues in the interior of the country - with libraries and cinema clubs. The Saturday morning screenings for children were an eagerly anticipated event for the city’s children. The same was true of films and even news and sports events. Nowadays, it is more common to have television sets at home, and there are different forms of consumption, meaning that cinema clubs have become obsolete. Film programmes are now organised on a thematic basis, attracting audiences interested in the selected content.

The ACIGE, created in 2018 in collaboration with the Spanish cultural centres in Equatorial Guinea, has put in place a number of events for exhibitions, education and audiovisual production. In particular, the Association created the Cine para la Ciudadanía Festival, and the Cine para la Educación Festival focusing on youth and responsible behaviour. The Directorate-General of Cultural Centres and Cinemas (DGCT) also works in collaboration with the ACIGE.9

The collaboration between ACIGE and the DGCT with Casa África has enabled initiatives such as the SurSur Equatorial Guinea Travelling Film Festival (FECIGE), as well as the presence of Equatorial Guinean cinema at the Tarifa-Tangiers African Film Festival – FCAT on several occasions.

The 1st African Film Festival in Equatorial Guinea took place in Malabo in 2010. The project was financed by Casa África and organised by AL Tarab of the Tarifa-Tangiers African Film Festival and the CCEM (Spanish cultural centre of Malabo).10

To celebrate Africa Day (25 May 2019), a heritage project entitled “A Film Heritage: Memories Equatorial Guinea’s Cinemas” was launched through the Guinea 2020 heritage organisation - Equatorial Guinea’s Ministry of Culture, Tourism and for the Promotion of Handicrafts and the Spanish cultural centre in Malabo.11

Finally, the network of cultural centres of the AECID (Agencia Española de Cooperación Internacional para el Desarrollo) has been a platform for dissemination in the Ibero-American space, such as the CINEMA TANGA cycle or the CCBA en corto / Afica through barriers cycle, an event that took place in Buenos Aires in 2012. This network of centres has also made it possible to screen European and Latin American cinema in Malabo and Bata in cycles such as the Afro-Caribbean Enclave and Afrodescendences. The Miradas Doc; Hot Doc; Goteborg Festival and DOCTV CPLP competitions have also contributed to the dissemination of Equatoguinean film production.12

**EDUCATION AND TRAINING**

Little training in film, audiovisual and creative fields is available. Recently, a film school was created under the coordination of the ACIGE.

The ACERCA audiovisual training programme is developed in partnership with the Spanish cultural centres in Malabo and Bata and is mainly focused on heritage issues, both tangible and intangible. The Spanish cultural centres developed a training course in 2010 in partnership with the Tarifa-Tangiers African Film Festival (FCAT), a Stop Motion animation workshop led by Coke Riobóo as well as short courses with the Media LAB and the TV show Malebeando.

**NOTES**

1. https://www.wipo.int/members/en/contact.jsp?country_id=68
8. https://issuu.com/ccemalabo/docs/ccem_atanga_cine_05_con_tapas
10. https://www.youtube.com/watch?v=RxOLehgUXQ
12. Revista Atanga
ERITREA

Population: **4.2 million**
GDP per capita: **US$ 811**
Median age: **19.2 years**
Urban population: **40.7%**
Rural population with access to electricity: **30.2%**
Mobile phone subscription: **20.4%**
Internet users: **1.3%**
Female upper secondary education completion rate: not available


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The Department of Information and Culture (DIC) develops Eritrean art and literature, preserves, studies and restores Eritrea’s historical and cultural heritages, establishes national theatre, art and literature schools, museums and other cultural institutions, and engages in informational, cultural and sports exchange and cooperation activities.\(^1\)

More specifically, the film industry is regulated by the Eritrean Film Rating Committee created in 2008, which monitors the technical and aesthetic quality of films produced and distributed in the country.\(^2\)

Regarding the broadcasting sector, the Communications Department of the Ministry of Transport and Communications regulates and promotes fair competition and efficient market practice in the communications, ensuring that standard broadcasting services are supplied as efficiently and economically as possible.\(^3\)

FILM AND AUDIOVISUAL POLICY

Eritrea currently lacks a film and audiovisual policy.\(^1\) However, efforts have been underway to develop a cultural policy for the country.

For example, in September 2015, the government issued the Cultural and Natural Heritage Proclamation. The Proclamation essentially entrusted the management of Eritrea’s heritage to the Ministry of Education to establish a board of 16 members coming from a number of institutions who would oversee and create policies relating to cultural and natural heritage.\(^4\)

COPYRIGHT PROTECTION AND PIRACY

It is difficult to assess the amount of money lost due to piracy. In 2015, Eritrea introduced the Penal Code that includes tougher penalties on copyright infringements. However, the law does not curb online intellectual property infringements.\(^5\)

PRODUCTION

FILM

The history of cinema in Eritrea dates back to the 1930s, so did the rise of cinema in Eritrea’s capital Asmara. In the 1940s, over ten cinemas were constructed all over Eritrea, which made it among the first countries to own grand theatres in Africa.\(^6\)

Since its independence in 1991, Eritrea’s film industry has been flourishing as more Eritreans decide to watch more locally made movies instead of productions from Bollywood and Hollywood.\(^7\) The film considered the industry maker, Bereket Yohanne’s *Barud* 77 (1997), reportedly sold more than 140,000 entry tickets in the first weeks of screening.\(^8\) It was also the first movie in Eritrea to have been shot with a Beta Cam and to have its own original sound track.\(^8\)

Interest in Tigrigna films started over a decade ago when producer and director Isaias Tsegai adapted a popular Tigrigna fairy-tale entitled *Milieu: Hawey Kindi Hamutey* (2009),\(^9\) for the screen. Other filmmakers adopted this idea and some of Isaias Tsegai’s characters have become part of the popular language.\(^10\)

By the end of the 2010s, the industry was producing some 60 new low budget films every year and had conquered Tigrinya-speaking audiences.\(^11\) Other popular Eritrean films of note include *Minister* (2002),\(^12\) directed by Temesgen Tsehay and written by Efrem Kahsay (Wedi Kuada) – the first Eritrean movie to be subtitled in English. *Debbas* (2014) became popular in Eritrea and abroad,\(^13\) and won a Platinum prize in the 2014 Houston’s Remi Award in the US.\(^14\)

More recently, a new movement sometimes referred to as New EriWood emerged, in part thanks to the explosion of countless YouTube channels, streaming platforms, and blogs with content in Tigrinya, including films made in Eritrea.\(^15\)
Director, producer and writer Efrem Kahsay ‘Wedi Quada’ is considered one of the founding pioneers of the New EriWood Film era, and his short movie Ziena Erefti (2019) won gold at IndieFEST Film Awards.

Although around 200 films of different genres have been produced so far, experts consider the last ten years as a formative period of Eritrean film production as those involved are not professionals trained in the field.

TELEVISION AND VIDEO

As elsewhere, up-and-coming filmmakers can practice their craft by producing commercial, corporate, music or wedding videos.

Since 2018, the explosion of YouTube and online platforms has also given an outlet for many content creators to distribute and even monetize their content.

When it comes to television, Eri-TV regularly broadcasts films by popular local directors such as Isaias Tsegai, Debessai Weldu and Solomon Dirar. Equally popular are Yonas (Minus) Mihreteab’s short comedies, which treat serious issues in humorous ways.

DISTRIBUTION, EXHIBITION AND BROADCAST

CINEMA EXHIBITION

The country has about ten cinema screens located across Asmara, including Cinema Dante, Cinema Roma, Cinema Impero, Cinema Capitol, Odeon Theatre and Cinema Hamassen. These historic cinemas are renowned for their beautiful modernist architecture.

Most of the cinema halls screen films, are used for rehearsals of stage dramas and other related cultural shows, and some of them also screen football games such as the Premier League, the Champions League and the World Cup. Prior to the Covid-19 lockdowns, Eritrean cinema halls were usually packed during the weekends by audiences looking to watch locally made Tigrigna movies.

BROADCAST

The penetration of TV sets remains low despite a significant increase in recent years, and stood at 33% in 2019. Access is mainly provided through analogue terrestrial broadcast, distributing the national free-to-air (FTA) channels.

Established in 1993, Eri-TV is a state-owned Eritrean television station with a large viewership base outside of Eritrea, which the state-run channel acknowledges and utilises to communicate with Eritreans living abroad. The network has an estimated 1-2 million weekly viewers. Channel II is also a state-owned station that covers all corners in Eritrea.

Foreign TV channels started beaming in Asmara from 1996 and slowly started spreading to other major towns. Eritreans receive foreign TV programmes via two major satellites: The Arab Sat and the Nile Sat. The international pay TV operator DStv (MultiChoice) has a small footprint in the country. In Highland Eritrea prefers English language channels. In the lowlands, other ethnic dialects, it’s Arabic which is the language of trade in this region. Al Jazeera, unveiled in Eritrea in 1996, is also a popular international channel.

Other Arabic channels, Al Arabia, Al Mannar and Al-Mustaqilla are also available for the lowland audience.

DIGITAL PLATFORMS

In January 2020, there were 293,300 internet users in Eritrea, with Internet penetration standing at 8.3%, and 22,000 social media users with social media penetration standing at 0.6%. Mobile subscriptions reached 711,000, equivalent to 20% of the total population, in 2020. Most Eritreans users on Facebook and Twitter are based outside the country. Similarly, online forums are based abroad, mainly in Europe, Australia and the US. YouTube is very popular with Eritreans both inside the country and abroad.

In Eritrea, residents can only access the internet through WiFi, but it is very slow. To get onto social media sites like Facebook and Twitter, people use a virtual private network (VPN). The Eritrean Telecommunication Services Corporation (EriTel) is the national telco, the sole operator of both landline and mobile telephone communication infrastructure in Eritrea, and one of the mobile service providers.
Eritrea lacks a public funding scheme for filmmakers. Many of them have to rely on their own resources to produce low budget films made for quick profits.27

There are no local film festivals being held regularly in Eritrea. Eritrean filmmakers sometimes submit films at the African Diaspora International Film Festival (ADIFF) which has been running for the past 28 years.28

European Film Weeks have a longstanding tradition in Eritrea and are one of the biggest European cultural events in the country.34 Every year a selection of European movies are screened in the country. The 15th European Film Week was organised in October 2019 in Asmara in the Mendefera at the National Union of Eritrean Youth & Students Hall.29

There are no educational institutions that teach film production in Eritrea. Most of the movies released in Eritrea have been made by trial and error by up-and-coming artists.14

NOTES

success.html
goldatindiefestfilmawards/
eritrean-films-to-promote-professional-film-production/
diasporainternationalfilmfest2020high/
ESWATINI

Population: 1.3 million
GDP per capita: US$ 8,688
Median age: 20.7 years
Urban population: 24%
Rural population with access to electricity: 70.2%
Mobile phone subscription: 93.5%
Internet users: 47%
Female upper secondary education completion rate: 33%


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The Swazi film sector falls, as other creative industries, under the Swaziland National Council of Arts and Culture, which operates under the Ministry of Sports Culture and Youth Affairs. National Arts Council members include representatives of the Swaziland Independent Film and Television Producers Association (SIFTPA). Filming accreditation, licencing and regulation are the responsibility of the Information and Media Development Directorate. Meanwhile, the Eswatini Communications Commission (ESCCOM) regulates the broadcasting sector whilst being overseen by the Ministry of Information, Communication and Technology together with the Eswatini Television Authority.

FILM AND AUDIOVISUAL POLICY

The National Arts and Culture Policy of 2009 states the intention to develop the local creative industries through interventions in art education, funding for culture, promotion of cultural products, and the status of the artist. In 2007, a draft Film Bill was developed with the assistance of the Commonwealth Secretariat. Since then, a discussion paper on the formulation of a Film and New Media policy, including the establishment of a National Film Office, has been completed. The document notes the necessity to update current film licencing procedures and eventually replace the outdated Cinematograph Act of 1920.

The country has recently passed a number of bills relating to the broadcast sector, including a Digital Migration Act, a Broadcasting Bill, and a Communications Act. Importantly, they establish a 40% local content quota for broadcast.

COPYRIGHT PROTECTION AND PIRACY

Eswatini does have a Copyright Act (1912) and an updated Copyright Law, as well as other related regulatory documents. Matters of Intellectual Property fall under the Intellectual Property Office of the Ministry of Commerce, Industry and Trade. The country does not have a Collective Management Organization (CMO). In consequence, piracy remains significant, and practitioners estimate that 25-50% of potential revenue is lost from the illegal sharing and sale or creative content.

PRODUCTION

Practitioners estimate that about 30 production companies operate in Eswatini. Those companies are mostly engaged in television and commercials projects. Between two and five local feature films are produced every year in the country. Overall, the film and audiovisual sector provides indirect employment to some 200 people, although the number of filmmakers exclusively making a living from their craft can be most likely counted on one hand. Experts estimated that the film industry generates US$ 780 from film sales annually and created 180 direct and 200 indirect jobs.

FILM

Like the rest of the Southern African region, Eswatini occasionally serves as the backdrop to wildlife or cultural documentaries. Swazi wildlife locations of significance include various nature reserves and national parks, as well as Sibebe Rock, the second largest monolith in the world after Australia’s Uluru. Nevertheless, film equipment and crew are typically brought in from South Africa due to a lack of capacity for film production in Eswatini.

In the past 20 years, a few American and European films were shot in Eswatini (such as Sipho and Joyce, 2004; Today the Hawk Takes One Chick, 2008; Fool in a Bubble, 2010; Breaking Their Silence: Women on the Frontline of the Poaching War, 2019), with the most well-known probably being Wah-Wah (2005), directed by Richard E. Grant, based on his childhood experiences growing up in the country. In 2017, Liyana, a hybrid documentary-animation film by Swazi-born Aaron Kopp and Amanda Kopp, executive-produced by British-Zimbabwean actress Thandie Newton, won the award for Best Documentary Feature at the Los Angeles Film Festival.
However, these brushes with the global world of filmmaking did little to develop the local ecosystem. When it comes to local film production, Eswatini’s small but fast-growing pool of local directors and videographers, most of them recent graduates from Limkokwing University of Creative Technology, produce only a handful of films annually. Most of those are passion projects that rarely get any kind of distribution and do not generate revenue. In 2008, producer Thembumenzi Mabuza released *Batjele (Tell Them)*, describing it as “the first film produced regionally in Swaziland by Swazis”.\(^{11}\) In 2015, Xolelewa ‘Ollie’ Nhlabatsi’s short film *Lost in the World*, initially produced for Multichoice’s channel Mzansi Magic, was the first Swazi film to travel on the international film festival circuit, notably screening at London’s Film Africa Festival.\(^{12}\)

An average of four local and one international film are produced annually.

**TELEVISION AND VIDEO**

Despite a 40% local content quota for broadcast, the only two local TV channels operating in Eswatini rarely commission content, and when they do, the rates offered do not allow filmmakers to make a living wage, let alone a profit. Regional pay TV channel Mzansi Magic does not provide much of an avenue to Swazi content either. As a result, the growing number of Swazi film graduates rarely get the opportunity to practice their craft, slowing down production quality levels from rising.

**DISTRIBUTION, EXHIBITION AND BROADCAST**

**CINEMA EXHIBITION**

At its peak in the 1990s, Eswatini counted at least seven cinemas. Today only two cinemas remain. In 2020, a new four-screen multiplex was opened in the Manzini business hub.\(^{13}\)

**BROADCAST**

TV sets penetration reached around 54% of households in 2019 in Eswatini. The reception consists essentially of free-to-air (FTA) channels broadcast through digital terrestrial networks, as the migration to digital terrestrial television (DTT) was completed in 2016. Eswatini counts one public station, Eswatini TV\(^{14}\) (also known as Swazi TV), and one private station, Channel Swazi,\(^{15}\) established in 2001. Regarding pay TV, DStv (MultiChoice) captures virtually 100% of the market that is exclusively direct-to-home satellite-based for the moment, although DTT offers are expected to be launched in the coming years.\(^{16}\)

**DIGITAL PLATFORMS**

Although VOD platforms like Showmax and Netflix are technically available in Eswatini, the number of subscribers is low. It is estimated that there are 20,000 pay TV and VOD subscribers in Swaziland.
FUNDING SOURCES
AND MECHANISMS

There is no structured public funding scheme for film in Eswatini. However, in 2020 Eswatini TV, the country’s only public broadcaster, started commissioning and licencing local productions. Although the rates offered by Eswatini TV are low, this is currently the only reliable source of funding for local content in Eswatini.

PROMOTION

There are no film festivals. Between 2014 and 2017, Limkokwing University, the Alliance française de Mbabane, the Swaziland Independent Film and Television Producers Association (SIFTPA) and other partners organised the European Union Film Festival Swaziland, which showcased European films as well as a few local short films.17

EDUCATION AND TRAINING

The only film and audiovisual training programme currently available in Eswatini is Limkokwing University’s Associate Degree in Film and TV Production.18 Limkokwing, a private Malaysian university with branches in several southern and western African countries, opened its Eswatini campus in 2011 and now produces between 30 and 50 film graduates per year. A majority of Swazi film and TV professionals are recent graduates of Limkokwing. Overall, the Swazi film sector is very young (23-28 years old on average) but ambitious.

Between 2014 and 2017, the European Union in partnership with the Alliance française and the Swaziland Independent Film and Television Producers Association (SIFTPA) ran a film development project called The Film Lab Initiative (FLI),19 in parallel to the EU Film Festival. Its aim was to support the growth and development of the Swazi film industry by empowering aspiring filmmakers with professional filmmaking skills, but the programme was discontinued in 2017.

NOTES

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ETHIOPIA

Population: 144.9 million
GDP per capita: US$ 2,220
Median age: 19.5 years
Urban population: 21.2%
Rural population with access to electricity: 31%
Mobile phone subscription: 36.2%
Internet users: 18.6%
Female upper secondary education completion rate: 14%


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The Ethiopian Ministry of Culture and Tourism is responsible for researching, preserving, developing, and promoting the culture and tourist attractions of Ethiopia and its peoples, both inside the country and internationally. It coordinates with the Authority for Research and Conservation of Cultural Heritage (ARCCH), the Ethiopian Wildlife Conservation Authority (EWCA), the National Archives and Library Agency, and the Ethiopian National Theatre in regulating and developing the film and audiovisual industry.

The agency which oversees media and film is the Media Authority (formerly the Broadcast Authority, renamed and restructured in May 2021) and is responsible for all licences for local companies and permits for foreign productions.

Established in 1993, the Ethiopia Filmmakers Association (EFIMA) was intended as an organisation that would lobby on behalf of filmmakers and represent the interests of the artists in Ethiopia. The Ethiopian Film Production Association (AFPA), which was formed in 1999 after the dissolution of the Ethiopian Film Corporation (EFC), also represents the interests of film producers. Finally, the Association of Ethiopian Broadcasters (AEB) is a private organisation that lobbies for the interest of media owners.

FILM AND BROADCAST POLICY

Ethiopia’s film policy was adopted in 2017. It bears a special focus on job creation for the youth and gender equality. However, experts identified gaps between the policy goals and the reality for Ethiopian professionals in the film industry. One of the major issues was insufficient policies around content policing by the government and a lack of clear pathways for export and participation in the international or African market.

COPYRIGHT PROTECTION AND PIRACY

Practitioners estimate that 75 to 100% of revenue is lost to piracy. However, Ethiopian copyright law date back to the enactment of a codified penal law and civil law in 1957 and 1960 respectively. In 2003, the Ethiopian Intellectual Property Office (EIPO) was established to provide legal protection for intellectual property rights and a year later in 2004, the government enacted the Copyright and Neighboring Right Protection Proclamation as the country’s first comprehensive legal framework.

The EIPO is mainly involved in formulating legal and policy frameworks for the protection of copyrights, creating awareness in the general public, and building capacity among right holders, law enforcing agencies and policy makers. The creation of EIPO and the passing of the Copyright Proclamation were viewed as a new beginning for the copyright industry in Ethiopia.

In 2014, the Parliament amended the 2004 copyright law and established a royalty collection system, the Copyright and Neighboring Right Protection (Amendment) Proclamation.

PRODUCTION

It’s estimated that the Ethiopian film and audiovisual industry generates US$70 million annually and contributes 0.8% to the country’s GDP. Practitioners estimate that the audiovisual industry employs 4,000 and 31,000 people directly and indirectly. There are approximately 140 production companies operating in Ethiopia.

FILM

Cinema was introduced to Ethiopia only three years after the world’s first film ever was projected in Paris on December 28, 1895 by the Louis Lumiere brothers. Earlier on, Ethiopians adopted the art of film production and started producing documentaries and feature films.

In 1923, the first cinema house called Yeseytan Bet (The Devil’s house) was unveiled. Local films Shaft in Africa (1973) and Gouma (1975) by Michel Papatakis were among the popular films produced during the era.

Practitioners estimate that 600 films were produced in Ethiopia between 2005 and 2015. By 2015, close to 150 locally produced new features were released in the theaters in Addis Ababa every year.
Today, the government reports that 140 local and 4 foreign films on average are produced in Ethiopia annually. Most of these films are low budget productions made for US$10-30,000 and destined only for local release. Only a handful of films are exported for foreign sales or festival distribution.

Besides the popularity of Ethiopian films locally, some filmmakers have also graced international stages. The Price of Love (2015),11 written and directed by Hermon Hailay, won several international awards including best actor at Festival du Cinéma Africain Khouribga in 2015 and best film at Stockholm Film Festival in 2015. Sewnetwa (2019), written and produced by Eskedar Girmay with financial support from the International Labour Organization and the Ethiopian Ministry of Labor and Social Affairs, was inaugurated by the Ethiopian President H.E. Sahlework Zewdie.12 Ethiopia has also presented several films to the Academy Awards, including The Athlete in 2010, Difret in 201413, and Yared Zeleke’s Lamb14 in 2015.

Women have played a role in the film industry in Ethiopia as writers, directors, producers, and scholars, especially during the digital adaptation. Tsetzet (1993) directed by Tesfaye Senke was the first film to be privately funded by Rukiya Ahmed. Yebredo Zemen (2002) (translated as Ice Age) by Helen Tadesse was the first Ethiopian movie shot on VHS to be exhibited in a cinema, and it sparked a revolution in the nation’s film industry. Eyersalem Kassahun, a theater arts professor at Addis Ababa University wrote, produced, and directed Traffic Cop (2013), a romantic comedy that was quite successful in the cinemas. Arsema Worku is an actress, author, director and producer renowned for her movie Ennet (2016). Kidist Yilma’s film Rebuni (2015) won Ethiopia’s most prestigious award, the Gumma.11

Finally, Ethiopia has long offered attractive film locations for filmmakers, from historic monuments to the Danakil Depression in Afar, national parks, the Blue Nile Falls and rural forests.15 International films shot in Ethiopia include: Clash of the Titans (2010), Difret (2014),16 Dare to be Wild (2015), and Jesus Shows You the Way to the Highway (2019), Sweetness in the Belly (2019),17 and Finding Sally (2020).18

**TELEVISION AND VIDEO**

Young filmmakers in Ethiopia often make an income through shooting corporate, music or wedding videos, or by distributing their own creative work online, where they generate advertising revenue. Creators, nonetheless, face significant barriers in monetising work online due to internet connectivity issues and also banking systems in Ethiopia which make it challenging to collect.19

Until 2014, Ethiopia’s television stations tended to produce their own content—mostly news and a few serial dramas—and there was little connection between the movie industry and television. Televisions are now required to play 60% of local content.

Inspired by the success of popular U.S. children’s TV series Sesame Street,20 Ethiopian educator Brikatwiti Tigabu and her husband Shane Etzenhouser, unveiled Tsehai Loves Learning, the only children’s TV show in Ethiopia in Amharic which uses puppets and animation to teach young Ethiopians about sanitation and hygiene as well as the importance of culture and honesty. For the many children in Ethiopia without access to TV, Tigabu and her team innovated ways to bring Tsehai and the other characters of the show to the kids, including books, community screenings and traveling road shows.21 Min Litazze, which translates to “How may I serve you?” was Ethiopia’s first political satire show to be broadcast on state television in September 2019. The show was created by director Behailu Wase.22

Entrepreneur and producer Feven Tadesse and her company Mavericks Films also created a show called Impressum,23 which broadcasts and discusses new, locally made movies. Viewers can vote on their favorite movies via text message.11

Kana, launched in April 2016, was the first private station in Ethiopia. Moby Media Group was co-founded with three Ethiopian entrepreneurs. In April 2021, French owned Canal+ purchased Kana TV for an undisclosed sum of money.24 Kana TV is an Ethiopian general entertainment, free-to-air, satellite TV channel showcasing international and local shows.25 It also unveiled a mobile app where viewers can get access to the shows.26

To further boost the local film industry, Canal + is expected to be launched in Ethiopia in 2021. The French operator signed a deal with Eutelsat to be hosted on Eutelsat 7C through a multi-year, multi-transponder contract for Ku-band capacity. The pay TV operator will host 50 premium channels in a mix of standard and high definition and a selection of Ethiopian FTA channels.27

EBS TV also provides quality programmes pertaining to the rich cultural heritage of Ethiopia, its history, tradition, socio-economic development, business, tourism and current affairs. The station can be accessed on Roku, Google TV, Android IPTV and Web TV (PC/Mac,iPhone/iPad and Android devices).28

**DISTRIBUTION, EXHIBITION AND BROADCAST**

**CINEMA EXHIBITION**

There are 127 cinema screens in Ethiopia, spread across the capital, Addis Ababa. The Amharic-language film industry which emerged in Addis Ababa in 2002 depends on theatrical releases inside Ethiopia to generate profits.29 Cinemas in the country attract long queues as the audience seek to watch and promote the local films. Government-owned cinemas prefer to screen local productions, which are very popular, relegating foreign films to the morning showtimes—if showing them at all.30

With the outbreak of the Covid-19 pandemic, the Ethiopian government closed cinemas and theatre halls, forcing filmmakers to release their films on social media (YouTube) and in DVD or VCD format traded on the streets.31
BROADCAST

In Ethiopia, the penetration of TV sets is slowly progressing, reaching around 17% of households in 2019. The overwhelming majority of accesses are provided through direct-to-home satellite (DTH), distributing the national free-to-air (FTA) channels, as well as pan-Arab broadcasters. In 2016, Ethiopia began its digital switch-over. The government projected the switch to end between 2021 and 2026.

Today there are 10 public and some 26 private TV stations in Ethiopia. Among the government owned stations are the Ethiopian Broadcasting Corporation (EBC), ETV, OBN, Tigray TV and SRTV.

In 2016 and 2017, more private broadcasters such as Kana TV, launched in April 2016, and the first private station in Ethiopia joined the market signalling the liberalisation of TV. Others included the news centered ENN TV, US based satellite TV EBS TV, and others like LTV Ethiopia, and EOTC TV. Dimtse Woyane was launched at the end 2018. In October 2019, Ethiosat, the first dedicated Ethiopian TV platform to host Ethiopia’s most popular local channels, was launched. The project was spearheaded by the Association of Ethiopian Broadcasters (AEB), the Ethiopian Broadcasting Corporation (EBC), and global satellite operator, SES.

On the pay TV segment, the international operators DStv (MultiChoice) and StarTimes are leaders, with Canal+ expected to launch in 2021.

DIGITAL PLATFORMS

Ethiopia reported 44.86 million mobile connections in 2021, representing 38.5% of the total population. 23.96 million people were connected to the internet as of January 2021, corresponding to 20.6% internet penetration. At the same period, there were also 6.7 million social media users in the country. In 2020, the Ethiopian government granted two new spectrum licences in a bid to liberalise the long-restricted telecoms sector. A 40% stake in state-owned Ethio Telecom – the sole mobile services provider in a country of 112 million people – will also be sold as mobile network operators quest to provide services in Ethiopia. The sales are part of the government’s economic reform programme to raise Ethiopia to middle-income status by 2025.

Global VOD sites Netflix, Showmax (MultiChoice), Amazon Prime and Apple TV+ are available in Ethiopia. In March 2021, Avetol, a local firm, also launched a video-on-demand streaming service to give users easy access to curated local Ethiopian content. The Ethiopian film industry relies on YouTube with both experienced and amateur filmmakers capitalising on the digital space to market their work and earn income. Videos garner views of up to 800,000.
**FUNDING SOURCES AND MECHANISMS**

The absence of public and private financing is one of the major challenges of the Ethiopian film industry. Experts state that Ethiopia lacks a clear pathway for equity investment through which the business and international communities can engage with producers. Because of the lack of public funding, most local creators tap into their own resources or seek loans to fund low budget films. The issue of funding is one of the areas being addressed by the Ministry of Culture through the Film Policy ratified in 2017. Some private entities in Ethiopia offer loans for film production. International film development institutions, the DW Akademie Film Development Fund, accepted applications from filmmakers from Ethiopia for the first time in 2021.

**PROMOTION**

The Ethiopian International Film Festival, launched in 2005, is run by Linkage Arts Resource Center and takes place annually. It showcases and promotes Ethiopian as well as African film films through the screening of over 100 films (features, shorts, fictions, documentaries, animation, experimental, classics and contemporary) from around the world, as well as through the organisation of seminars and workshops for filmmakers. The Colors of the Nile International Film Festival was run and managed by the Blue Nile Film and Television Academy and the Ethiopian Filmmakers Association, but it hasn't operated in years.

Created by Initiative Africa in 2007, the annual Addis International Film Festival (AIFF) provides a platform for amateur and professional filmmakers alike. It is one of the largest independent documentary cinema festivals in Africa, established to support innovative ways of creating awareness on social issues.

Another local film event is the Gumma Film Award created by director Yonas Berhane Mewa, the founder and owner of Ethio Films Production. It acknowledges and supports the best performing films and artists in the country and also seeks to elevate the industry to the global standard. Gumma promotes Ethiopian culture, values and Ethiopian stories worldwide.

Finally, the European Union also promotes Ethiopian Films through its European Film Festival, which showcases both foreign and local films. Ethiopia also counts several foreign and local cultural centres involved in local film awareness and promotion. The local cultural centres are managed by the Ethiopian National Cultural Center, a government body which organises different national and regional art and cultural festivals. The centres are mandated to conserve and develop cultural values through research, technology application, training, literary and artistic criticisms, memorial forums and events like culture week.

Ethiopia Creates is the local agency charged with the promotion of Ethiopian filmmakers’ works at international events such as the Cannes Festival and European Film Market (EFM). The British Council and the Alliance Francaise notify filmmakers of training and workshop opportunities via their newsletters. The other two databases of creators in the film sector are held by director Tamara Dawit’s Gobez Media – a boutique production company that produces innovative content in Canada and Ethiopia, and also IEFTA, both of which publish newsletters and share on their social media sites/groups about opportunities in Ethiopia.

**EDUCATION AND TRAINING**

Practitioners estimate that between 30 to 70 students graduate in film courses annually. Addis Ababa University, a public institution offers film and media courses, including a recent master programme in film. However, it has insufficient resources and lacks competent teachers, according to practitioners.

The Blue Nile Film and Television Academy (BNFTA) offers high quality filmmaking training. It was founded by the award-winning cinematographer Abraham Haile Biru in 2009 and aims at bridging the gap of skilled professionals in the Ethiopian film and television industry. BNFTA offers a regular one-year filmmaking programme and a number of short courses in camera, light, sound, directing, scriptwriting and editing.

EECMY School of Jazz Music and Media also trains musicians and media producers.

The British Council and the Alliance Francaise notify filmmakers of training and workshop opportunities via their newsletters. The other two databases of creators in the film sector are held by director Tamara Dawit’s Gobez Media – a boutique production company that produces innovative content in Canada and Ethiopia, and also IEFTA, both of which publish newsletters and share on their social media sites/groups about opportunities in Ethiopia.
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INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The Ministry of Arts and Culture is the organism in charge of the cinema sector in Gabon. The body responsible for developing Gabonese film and audiovisual production is the Gabonese Institute of Image and Sound (Institut Gabonais de l’Image et du Son, IGIS), created in 2010 to replace the National Centre of Gabonese Cinema (Centre National du Cinéma du Gabon, CENACI).

The Ministry of Communication is responsible for the audiovisual industry, under which operates the Directorate-General of Communication (Direction Générale de la Communication, DGCOM) whose mission is to implement the government’s policy concerning communication. As such, it is responsible for, amongst other things, promoting the development of all audiovisual, written, digital, and cinematographic companies.1 Gabon’s High Authority of Communication (Haute Autorité de Communication, HAC)2 is also responsible for the regulatory framework for the audiovisual sector.

The Gabon Federation of Film and Audiovisual Professionals (Fédération des Professionnels du Cinéma et de l’Audiovisuel au Gabon, FEPCIAG)3 is the largest professional organisation in terms of representation of the sector.

FILM AND AUDIOVISUAL POLICY

Law No. 019/2016 of 9 August 2016 on the Communication Code of the Gabonese Republic4 is the law regulating the industry as a whole. One distinctive aspect is that this law contains a measure imposing an audiovisual licence fee on every economic operator active in the communications and cinematography sector and on every physical person with a digital terminal.5

Stakeholders indicate that several legal texts are currently being elaborated and others are in the process of being voted on in order to regulate the audiovisual and cinematographic sector in Gabon. According to interviews carried out during this study, greater financing as well as adequate training and control over piracy will allow this sector to see real change.

COPYRIGHT PROTECTION AND PIRACY

Stakeholders estimate loss of earnings due to piracy at between 25 and 50%.

Law No. 1/87 of 29 July 1987 establishes the protection of copyright and related rights in Gabon.6 Its provisions are also applicable in terms of the protection of the related rights of artists, performers, producers of phonograms and directors of radio and television broadcasting programmes.

The Gabonese Copyright and Related Rights Office (Bureau Gabonais du Droit d’Auteur et des Droits Voisins, BUGADA)7 joined the World Intellectual Property Organization (WIPO) in 1975.8

PRODUCTION

According to the stakeholders, the earnings generated in the cinema and audiovisual sector are weak and indicate the existence of 25 production companies which produce on average ten local films a year. The average number of foreign films shot in the country per year is estimated to be three. The same sources indicate 30 direct jobs and 100 indirect jobs linked to the cinematographic and audiovisual industry in Gabon.

FILM

Gabonese cinematographic production was prolific up until the end of the 70s. As well as numerous short films, we can also cite feature-length films like Les tam-tams se sont tus (1971) by Philippe Mory; Identity (1972, Identité) by Pierre-Marie Dong; Obali (1976) and Ayouma (1977) by Pierre-Marie Dong and Charles Mensah; Tomorrow Is a New Day (1978, Demain un jour nouveau) by Pierre-Marie Dong; Ilombé (1977) by Pierre-Marie Dong and Charles Mensah; Tomorrow Is a New Day (1978, Demain un jour nouveau) by Pierre-Marie Dong; Ilombé (1978) by Charles Mensah and Christian Gavary; and Où vas-tu Koumba (1971) by Alain Ferrari and Simon Augé. There was also a successful serial with 13 episodes lasting 30 minutes of quality cinema.

Two Gabonese authors are making names for themselves. Imung Ivanga, who has made a dozen films including *Dôle* (1999) and *L’Ombre de Liberty* (2006), and Henri Joseph Koumba Bididi with *Les Couilles de l’éléphant* (2000) and *Le collier du Makoko* (2011).

Independent cinema was born at the start of the 1990s with authors from the video industry who began directing films and television series, notably André Ottong and Patrick Bouémé Shanic. Some of the most prominent authors are Maggie Youngou with *Cap Estérias* (2010), Dominique Mpoumba with *Fantomas* (2011), Van Mabadi with *Amour ou sentiment* (2011) and *Vacances à Kinguéli* (2013), Melchy Obiang Kongossa with *L’amour du diable* (2011), *Le Cœur des femmes* (2013), and *La Puissance de la foi* (2014), and Patrick Bouémé with *La Chambre secrète* (2014).

**TELEVISION AND VIDEO**

Groupe Gabon Televisions is heavily involved in the production of all types of local content, offering services including advert production, event media coverage, reports, various messages, studios, magazines, etc., in a market that is relatively limited due to its small size. Licences and requests for local content are rarer and more exceptional.

Gabonese series are enjoying remarkable audience success, as is the case for *Kongossa*, *Kiara* and *L’OEil de la Cité* but also *Ndoss*, *Destinée*, *Trahison* and *Sens Dessus Dessous*.

**DISTRIBUTION, EXHIBITION AND BROADCAST**

**CINEMA EXHIBITION**

Two Canal Olympia screens are operational in Libreville and Port-Gentil. The Institut Français du Gabon screen is the only other cinema, giving a total of three cinemas in the whole of Gabon.

**BROADCAST**

For several years now, television sets have been widely established in households, with market penetration reaching 92% in 2019. The majority of households receive pay television services, principally from direct to home (DTH) satellite. The operator Canal+ has dominated the pay television market for years. It is in competition with some Pan-African players in Gabon, such as Satcon Africa and TNT Africa.

Groupe Gabon Television, a public body, has three channels, one of which is a theme channel dedicated to culture. There are nine private television channels.
DIGITAL PLATFORMS

According to statistics from the National Agency for Digital Infrastructure and Frequencies (Agence nationale des infrastructures numériques et des fréquences, ANINF), Gabon has a total of three million mobile phone subscriptions, reaching a usage rate of 144% in January 2019.

The country has more than 2 million internet subscribers. Market penetration is around 95% thanks to the deployment of fibre optic broadband and internet packages by companies. However, available streaming platforms represent a very relative market in terms of number of subscribers.

FUNDING SOURCES AND MECHANISMS

Stakeholders indicate that the audiovisual and cinematographic licence fee mechanism is the only source of public financing for production in the country. Sadly, it does not report the number of projects financially supported by public organisations.

Public authorities indicate a clear improvement with the levying of the Audiovisual and Cinematographic License Fee (Redevance Audiovisuelle et Cinématographique, RAC) which has allowed for the creation of a special earmarked account (Compte d’Affectation Spéciale) which is not subject to the burdens of funding provisions like state subsidies.

PROMOTION

New initiatives aimed at strengthening public and private funding, as well as the establishment of a clearer institutional framework, are opening up greater prospects.

In 2011, at the initiative of Samantha Biffot, the first edition of the Festival International des Courts d’École took place and met great enthusiasm from young people. Training workshops led to a group making a short film, Hôtel Mindoubé.

The Masuku Film Festival (Festival du Film de Masuku), a festival dedicated to the environment initiated by Nadine Otsobo, launched its first edition in 2013. The oldest festival is the Escales Documentaires de Libreville (EDL) which celebrated its 12th edition in 2017. This festival provides a global picture of the changes transforming the continent, and highlights the new wave of African cinema while boosting Gabonese creativity.

EDUCATION AND TRAINING

The organisations providing training in the film and audiovisual field (vocational degree, academic degree, advanced vocational diplomas) are essentially the Philippe Maury Institute of Audiovisual and Cinema at Groupe EM Gabon Université (Institut Philippe Maury de L’Audiovisuel et du Cinema, IPMAC), the École Supérieure d’Architecture, d’Audiovisuel et de Design (ESAD) and the Académie d’Art de Carthage (ACC).

In spite of the limited existing offer, with barely 18 students graduating a year, the stakeholders indicate shortcomings in these training programmes, essentially centred around cinema and audiovisual techniques, and note the absence of several important specialisations.

NOTES

GAMBIA

Population: 3.2 million
GDP per capita: US$ 2,207
Median age: 17.8 years
Urban population: 61.9%
Rural population with access to electricity: 35.5%
Mobile phone subscription: 139.5%
Internet users: 19.8%
Female upper secondary education completion rate: 25%


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The film and audiovisual industry of The Gambia fall under the Ministry of Tourism and Culture. There is no film commission board or any regulating body and filmmakers are not required to take permission from the ministry before shooting films.

However, the National Council for Arts and Culture (NCAC) is responsible for promoting local contents and filmmakers, while the Film Producers Association of The Gambia represents practitioners in the sector.

The Public Utilities Regulatory Authority (PURA) manages broadcast outlets and contents, while the Broadcasters Association represents the country’s broadcasters.

FILM AND BROADCAST POLICY

There are no laws pertaining to the film industry, although PURA regulates all broadcasts, meaning that content provided to local TV stations by filmmakers must abide by PURA’s stipulations.

COPYRIGHT PROTECTION AND PIRACY

Although there are no independent studies on the impact of piracy on The Gambia’s audiovisual sector revenue, practitioners estimate that most local content is pirated.

The Copyright Act of 2004 mandates the Copyright Office, under the NCAC, with the responsibility to ensure and administer the registration of intellectual property works such as films, to fight piracy, and to sensitize the public on copyright issues. The Ministry of Tourism and Culture is in charge of oversight. Efforts are also underway to set up the Gambia Collective Society to collect royalties for artists and local content providers.

However, the Copyright Bureau is finding it challenging to exercise its mandate because of a lack of resources. The level of awareness of the copyright laws is low and hardly applied.

PRODUCTION

Since 2017 democratic progress, The Gambia’s film and audiovisual sector have been stagnant largely due to lack of investment in the sector, but has recently begun to display signs of future potential, with more young people now venturing into local film production. Practitioners estimate the total annual revenue generated by the film and audiovisual sector at around US$58,000. Eleven independent production companies have been registered with the NCAC, employing an estimated 189 people directly and indirectly excluding actors and actresses. There exist other production companies that have not been registered with the NCAC.

FILM

The Gambia Film Unit was established in the late 1960s under the Ministry of Information, and was charged with the audiovisual documentation of state events and development issues. Short films were produced under the leadership of filmmaker Ebrima Sagnia, and then shown in villages across the country. By 1975, UNDP provided a black and white film laboratory and trained technicians at the Film Unit, at the request of the government. Sagnia and those who worked under him became the pioneers of Gambian cinema.

In the next decade, a couple of international films were shot in The Gambia, such as Alex Haley’s Roots (1977), though it was produced with a wholly non-Gambian cast and crew, and Lamin (1987) shot by the Norwegian TV Broadcasting Corporation, featuring Gambian actors such as Sheikh Omar Jallow. Lamin stayed in the top 10 chart for ten weeks in Scandinavia.

Today, local film production is constrained by the lack of funding and of professionally-trained technicians. The issue of piracy also hampers the development of the local industry. Nevertheless, a few local Gambian films and filmmakers have been showcased at international festivals. Aarow (2006) by Amadou Sillah of Vinasha Productions was recognized by an African Movie Academy Award in 2006.
The Hand of Fate (2013), directed by popular local filmmaker Ibrahim Ceesay, won the Best Indigenous Film award at the 2013 Nollywood and African Film Critics’ Awards (NAFCA) in Washington, USA. The following year, Ceesay directed Sarata, a popular film featuring homegrown talents. More recently, Mëbët (2020), produced and directed by Ousman Jarju, received ten official international selections, including at the Silicon Valley African Film Festival and Women of African Descent Film Festival.

In the past decade, The Gambia has also gotten increasingly popular as a film location for producers of the sub-region, especially Nigerians. The most well-known Nollywood film shot in The Gambia is Obi Emelonye’s The Mirror Boy (2011). Others include Gifts from Babylon (2018) and While We Live (2016). Can’t Have It All (2019), a film produced locally with local crew and cast by Lilian Azizi, a Gambian-based Malawian, was premiered and broadcast in Malawi in 2020. Most of these foreign films shot in The Gambia use largely Gambian casts with the addition of a few popular actors from Nigeria to leverage the films in the international market. These collaborations have helped build the capacities and experiences of local crew and cast.

TELEVISION AND VIDEO

In The Gambia, television stations do not pay for local content. Gambian broadcasters operate on the barter model, which means that producers are required to look for sponsors to pay for their products to be aired. The arrangement even rules out legal rights of the producer to intellectual property royalties. In consequence, local TV stations mostly broadcast news and current affairs. Most local filmmakers make a living by producing advertising videos, as well as videos of weddings and other social events. The Gambian music industry is also very dynamic, creating opportunities for filmmakers in the music video space.

However, a few local TV drama series have been produced and broadcast. In 2013, In Babylon by Force, a series about a young man’s determination to travel to Europe, was broadcast on GRTS after the authorities made a financial donation to the producers to cover airtime on the national broadcast. In 2019, private station QTV got sponsorship deals from a bank and another financial service company to broadcast Lanjuro, a local drama series produced by Sheikh Omar Sawaneh. Also worthy of note is Nakala (2015), a series produced by Gambian Modou Lamin Touray alias DJ Lil Sisqo, which was broadcast on TFM, Senegal’s most prominent private TV station.

CINEMA EXHIBITION

Qcity is the only cinema in The Gambia. Its only screen shows both local and foreign films/contents. Plans for the construction of two other screens never materialised. Among the local films shown at QCity in 2019 were Can’t Have It All and Flight Mode: The Documentary. The venue was popular with cinema-goers prior to the onset of the pandemic but has since been closed.
The government, NGOs, and commercial companies such as mobile providers periodically sponsor productions directed at national television broadcast, be they commercials, documentaries or drama sketches, mostly intended for sensitization on social or educational issues.19

PROMOTION

There are no film festivals in The Gambia and therefore very little opportunity to promote local content.

A few initiatives by NGOs have attempted to promote cinema-going culture alongside their other areas of interest. In 2019 the International Office for Migration (IOM) launched CinemArena, a sixweek mobile cinema programme aimed at raising awareness on the risks of and alternatives to irregular migration.21 The initiative reached 31 villages across all regions.

EDUCATION AND TRAINING

The Gambia does not have any public or private institution offering film or audiovisual training programmes or courses. The University of The Gambia offers a Bachelor’s Degree programme in journalism, while the Media Academy for Journalism and Communication (MAJaC) and Insight Training Center (both private) have certificate and diploma programmes in journalism. While short journalism training programmes are regularly held in the country, the only known training specifically for filmmakers was a 2015 Motion Picture Art Certificate (MPAC) program, organised by the National Centre for Arts and Culture (NCAC).22

FUNDING SOURCES AND MECHANISMS

There is no public funding scheme for film in The Gambia. Although filmmakers from the country are technically eligible to access international grants, in reality this type of funding remains out of reach for most. In the absence of structured support, filmmakers use their own limited resources to produce their films which often results in uneven quality.19

NOTES

4. NCAC: Film. https://ncac.gm/portfolio-items/film/
11. QCity: About QCITY. https://qcity.gm/
15. PURA: https://www.pura.gm/
18. PURA: https://www.pura.gm/
The authority classifies feature films, documentaries and adverts intended for exhibition. It also issues permits to foreign productions wishing to film in Ghana as well as licences for local filmmakers, local film exhibitors, film libraries and local film distributors. The National Commission on Culture also has a division for Creative Arts working to further the interest of filmmakers.

Before the establishment of the National Film Authority in 2016, the state regularly collaborated with the Film Producers Association of Ghana (FIPAG), which has existed since 1995, to enforce some of the laws governing the sector. The FIPAG helped to manage the film sector against unauthorized distribution channels, piracy and unlicensed film productions. There are also a number of filmmaker unions under the Ghana Academy of Film and Television Arts umbrella like the Directors Guild and the Cinematographers Guild of Ghana.

Ghana’s broadcast sector is regulated by the National Communications Authority (NCA), while the Ghana Independent Broadcasters Association represents the interests of several independent broadcasting organizations.

### FILM AND BROADCAST POLICY

Passed in 2016, Ghana’s Development and Classification of Film Act is the core legislation that provides the legal framework for the development and regulation of the Ghanaians film industry. Before this legislation, the Information Ministry was tasked with some of the regulation duties, with support from FIPAG.

The Act allowed for the creation of the aforementioned National Film Authority which has the mandate of ultimately ensuring Ghana’s film industry becomes dynamic and economically self-sustaining. It has also put in place a Local Content Committee to spearhead efforts aimed at improving and revising content produced in the television sector to, among other things, attract investments and drive competition.

Even with more coherent legislation, enforcement of laws in the creative industry remains difficult.

Ghana also passed the Creative Arts Bill into law in 2020 which provides the institutional framework for the development and management of the Creative Arts Industry. This law is expected to lead to the creation of the Creative Arts Agency which will have the mandate of creating an enabling environment for the arts sector through direct and indirect support.

The creative arts sector has also benefited from tax breaks. Though not a targeted policy, companies within the arts and entertainment sectors have enjoyed a Corporate Income Tax rebate of 30% for most of 2021 because of the COVID-19 pandemic.

### COPYRIGHT PROTECTION AND PIRACY

Piracy of local films remains a challenge in Ghana, as well as in neighboring Nigeria, but practitioners are unable to estimate how much revenue is lost to it. The film industry has struggled with piracy since the video boom of the 1980s and 1990s where films could easily be copied and redistributed illegally on tape. Ghana’s copyright law, passed in 2005, provides for exclusive rights of authors in their audiovisual works, among others. It also affords protection for the related rights of performers and broadcasting organizations. But despite the existence of this law, the lack of enforcement of the intellectual property rights has served as a stumbling block to investments.

The National Film Authority is mandated to ensure compliance with the laws regulating copyright and disbursement of royalties in conjunction with the Copyright Administrator. Established in 1985, the Copyright Office is a department under the Ministry of Justice responsible for the administration of copyright in Ghana. Its stated policy is to educate the public on the use of copyright works that have fallen into the public domain.
Collective Management Organizations also help with education on copyright laws. Ghana has three: the Audiovisual Rights Society of Ghana, CopyGhana (Reprographic Rights Organization) and the Ghana Music Rights Organization. The Audiovisual Rights Society of Ghana is concerned with filmed works although, in order to eliminate the duplication of efforts, the Audiovisual Rights Society of Ghana entered into a collaboration with Ghana Music Rights Organization for more streamlined operations.

There are signs Ghana’s copyright regime is getting more effective as the sector more than doubled its contribution to the economy between 2013 and 2016.

**PRODUCTION**

It is estimated that there are nearly 500 production companies in Ghana.

Ghana’s Creative Arts Council has been tasked with collecting data on persons actively involved in the creative arts industry. Whilst it has not streamlined content to determine how many persons are employed by the film industry, it officially had 2,860 persons directly employed in the creative arts industry as of the first quarter of 2021. The Film Producers Association of Ghana has pegged the number of persons directly employed by the film and audiovisual industry at around 200,000. It also estimates that about 600 local films are made annually in Ghana.

The government says that the film sales generate US$10,000 annually and has created nearly 200,000 indirect jobs. In addition, the government estimates that in Ghana 600 local and 21 films are produced annually. The industry is, however, said to have shrunk in the last decade because of the lack of profitability and distribution struggles.

**FILM**

Film production in Ghana began in 1939, though cinema’s presence in Ghana can be traced back to 1910 when Christian missionaries first used films as evangelical tools.

The once-popular vernacular focused “Kumawood” film industry, which is based in Kumasi, has waned in recent times. Kumawood produces films shot in the Twi dialect and was at one point releasing up to 12 films a week with a budget of US$7,300 to US$12,200 a movie. The “Ghallywood” side of Ghana’s film industry, which targets English speakers, has been stifled by foreign imports from Hollywood and Nollywood in cinemas and piracy on the direct-to-video market.

Kwaw Ansah is the sole Ghanaian director who has historically been considered as one of Africa’s leading filmmakers. His first film, *Love Brewed in the African Pot* (1980), won the Oumarou Ganda Prize at the 1981 FESPACO (Panafriicn Film Festival of Ouagadougou) held in Burkina Faso, the Jury’s Special Silver Peacock Award for Feature Films at the 8th International Film Festival of India. *Heritage Africa* (1988), Ansah’s second film, also received international recognition with the “Étalon de Yennenga” award at the 1989 FESPACO. Ansah also launched a cultural television channel, TV Africa, in 2002.

More recently, the Ava Duverney-backed *The Burial of Kojo* by Blitz Bazawule was spotlighted at the World Cinema Amsterdam Festival and the Luxor African Film Festival where it won the Grand Nile Prize for Best Long Narrative Film. It was also considered for the Best Foreign Language Film nomination at the 2020 Golden Globes. These honours were in addition to rave reviews from film critics in The New York Times, The New Yorker, LA Times and Variety.

The film also had a theatrical run in the United States. *The Burial of Kojo* however missed out on being Ghana’s first entry for the Best Foreign Language Oscar at the Academy Awards after the selection committee chose *Azali* (2019) by Kwabena Gyanasah.

Filmmakers like Akosua Adoma Owusu and Nuotama Bodomo have garnered more recognition abroad for their avant-garde sensibilities. Owusu has had her short films curated on the Criterion Collection as part of the celebration of the 2021 Black History Month.

Other Ghanaian filmmakers have found audiences all over Africa and have been honoured across the continent. Peter Sedufia, who has directed films like *Keteke* (2017), selected at FESPACO in 2019, and *Side Chick Gang* (2018), managed to secure distribution deals in francophone countries. The films have also been acquired by Netflix.

Also notable has been the output of Shirley Frimpong Manso, Ghana’s most prolific filmmaker in the English language since 2009. Frimpong Manso has been honoured at the Africa Movie Academy Awards in the past for films like *The Perfect Picture* (2009), *Contract* (2012), *Potomanto* (2013) and *Devil in the Detail* (2014). An average of 21 foreign shoots are also held in Ghana each year. Though Ghana is not known as a destination for foreign productions outside of Nollywood films, it has played host to a few well known and critically acclaimed international films over the last four decades. These include Werner Herzog’s *Cobra Verde* (1987), Haile Gerima’s *Sankofa* (1993), the Omar Epps-led *Deadly Voyage* (1996) and Cary Fukunaga’s *Beasts of No Nation* (2015).
Nollywood’s influence in Ghana has largely been to the detriment of the local film industry. The proliferation of Nigerian films led to a drop in production from Ghana’s film industry by almost 75%. Some Nigerian producers chose to film in Ghana because of cheaper production costs owing to better power supply. In the midst of Ghana’s video boom in the 90s, the basic structures of the video business were also similar in Nigeria and Ghana. Before the current legal framework, the government imposed a US$1,000 license on visiting actors and US$5,000 on producers and directors as a protectionist measure.

**TELEVISION AND VIDEO**

The Ghanaian music video scene has been relatively vibrant, with some filmmakers carving a niche for themselves in that area. Easier access to better equipment has also meant more filmmakers are tapping into the local advertising and corporate video market. Brands based in Ghana are finding less reason to turn to producers from Nigeria and South Africa which used to offer better quality.

Ghana’s television industry is projected to make an average of US$176 million each year between 2021 and 2023.

Ghanaian television stations commission content from both in-house and external talents. TV3 has consistently aired local scripted and reality shows.

An episode of a scripted series for a one-hour slot can cost between US$2,610 and US$4,351. Filmmakers are expected to fund their productions and also pay for airtime at private television stations and then share advertising revenue with the broadcaster. Stations also sometimes offer filmmakers to "promote their work for free", meaning that they don’t ask them to pay for airtime but also don’t pay for the content. There are, however, some occasions where television stations may provide partial funding for a show.

Over the years, some of the more popular shows on traditional TV platforms have been Inspector Bediako, Taxi Driver, Efiewura, Chorkor Trotro and Sadia.

Multichoice has also made a push in the TV market with the March 2021 launch of a new channel, Akwaaba Magic, offering Ghanaian content. The channel features four Ghanaian shows available on the DStv pay TV platform and on VOD service Showmax.

In recent years, filmmakers have viewed online platforms like Youtube as more viable options to distribute and monetize their content. In 2014, Nicole Amarteifio’s An African City initially gained popularity on YouTube before being picked up by Nigeria-based EbonyLife TV and A+, Canal Plus’ premium pan-African entertainment channel. Since then, other shows such as Farmhouse Productions’ YOLO (2016) have done well on Youtube. YOLO was also notable for the support it got from the state, Department for International Development and USAID because of its message promoting healthy living.
CINEMA EXHIBITION

In the past, Accra had a number of thriving cinemas that relied mainly on local films. In addition to the cinemas like the Orion Plaza, Roxy and Rex, there were over 1,000 video centres that screened films and ultimately contributed to revenue for the industry. The cinemas started to struggle upon the onset of the video film when Hollywood films became more accessible. The sale of film rights to free-to-air TV stations also crippled cinemas and video centres because it became cheaper for audiences to watch films at home.

Today Ghana has ten cinema screens, all in the Greater Accra Region. The only cinema exhibitor in Ghana that shows theatrical releases is Silverbird with only two cinemas. This has been noted as a reason for Ghanaian filmmakers’ struggles at the box office.

Local Ghallywood films are able to get theatrical releases with the films of filmmakers like Shirley Frimpong-Manso and Peter Sedufoa always getting a theatrical run. Films from Kumawood, on the other hand, seldom release in theatres and mostly rely on direct-to-video distribution.

BROADCAST

The penetration of TV sets in Ghana reached 68.9% of households in 2020. The ownership of TVs was 82.4% in urban households and 51.7% in rural households. Most of these homes receive free-to-air channels.

The Ghana Broadcasting Corporation had a on the industry until 1995 when Ghana’s first private television network, Crystal Radiovision Network Limited, commenced operations. This was followed by the launch of the Thai-owned TV3 in 1997. From 2010, the distribution model has been marked by a switch from analogue to digital via the National Digital Terrestrial Television (DTT) Project which allowed for the proliferation of television channels. There are now 146 TV stations authorized by the National Communications Authority to operate. A total of 102 stations were on-air as of the end of June 2020.

However, Ghana’s DTT platform is not fully operational so broadcasters have not entirely benefited from the transmission of the digital terrestrial signal. The supply and installation of the DTT platform was completed by the fourth quarter of 2018 and the process to switch from analogue to digital terrestrial technology was nearing completion with the Digital Switch Over meant to begin from the middle of 2020. There are only two Analogue Terrestrial Television stations remaining.

In the pay TV segment, Ghana has six operators; Smart TV, Cable Gold, Crystal TV, First Digital, Go TV and Fly TV. There are 9.2% of Ghanaians households having subscriptions to pay TV, 12% in urban households and 3.5% in rural households. Aside from the pay TV segment, DSTV is a major player in the TV space and is categorised as a subscription management service by regulators. There are nearly 1,000,000 pay TV and VOD subscribers in Ghana.

DIGITAL PLATFORMS

Household internet access in Ghana stood at 16.8% in the first quarter of 2020. In urban areas, internet access rises to 16.8% of households, while it drops to 12.8% in rural areas. There were 15.7 million internet users in Ghana in January 2020, equivalent to a 48% internet penetration. Data costs are quite high, though Ghana plans to broaden the scope of its telecommunications licenses so mobile operators can have more spectrum available for internet use, lowering data costs for consumers. Ghana gave operators free spectrum and reduced its communication service tax to 5% to bring down data prices during the coronavirus pandemic.

Video on Demand services available in Ghana include Netflix, Showmax, Amazon Prime, Wi-flix and Iroko TV. Netflix has steadily grown its catalogue of Ghanaian content and content featuring Ghanaian performers. In addition, the strong presence of films from Nollywood has also made Netflix popular in Ghana. Showmax and Iroko TV also feature local content from Ghallywood and Kumawood.

FUNDING SOURCES AND MECHANISMS

PUBLIC FUNDING

There is provision for government support in the form of the Film Development Fund which is managed by the National Film Authority. But the fund has not been adequately resourced and has in the past appealed for startup money from the central government.

In addition, a Creative Arts Bill was passed into law, which allows for the creation of the Creative Arts Fund to enable the creative arts industry to source funding from the government to improve the sector. The goal is for the Creative Arts Fund to attract contributions from public and private institutions to enable players in the industry to secure competitive interest loans and grants to support their business.

Some public financial support was made available in 2020 to cushion creatives affected by the coronavirus pandemic. The National Board for Small Scale Industries disbursed US$6,445,993 to creative arts practitioners who applied for loans under the Coronavirus Alleviation Programme Business Support Scheme.

INTERNATIONAL GRANTS

Over the years, a few Ghanaian filmmakers have benefitted from access to international grants to fund their projects. Makafui Zimrani, for example, has been a Hot Doc Development Grant Recipient for his documentary Bukom Fighters.
Akosua Adoma Owusu received funding for her film Black Sunshine from the Berlinale World Cinema Fund. The British Council also has a mechanism to offer grants to filmmakers through its Creative Enterprise Support Programme.

**PRIVATE FUNDING**

Ghanaian filmmakers have generally resorted to private means to fund their films. There is a heavy reliance on equity financing from non-filmmaking business corporations as film production companies seldom have the means to finance a project.

More established filmmakers have been able to leverage support from a strong distribution network because they have in the past demonstrated an ability to make profits on their films. On his fourth film, Peter Sedufia received financial backing from South Africa-based Gravel Road Distribution Group and Canal+. He however had to source additional funds from local entrepreneurs and himself. Some brands and companies have also provided sponsorship for films in exchange for product placement.

Some filmmakers have also relied on crowdfunding. For example, Blitz Bazawule used Kickstarter to raise funds for the production of The Burial of Kojo.

**EDUCATION AND TRAINING**

Since 1978, the premier institution of higher education in film and television production in Ghana has been the National Film and Television Institute. It offers a Bachelor of Fine Arts Degree, a two-year Diploma as well as some shorter courses. It has consistently graduated over 100 students over the last three academic years. The Institute is a full member of the International Association of Film and Television Academies and Universities.

A new bill currently under consideration in the Ghanaian parliament proposes to merge the Institute with the Ghana Institute of Journalism and the Ghana Institute of Languages to form a university of communication studies.

Industry professionals are hesitant to vouch for the quality of products from private film schools but acknowledge their growing prominence. The Accra Film School, for example, is a Ghana Education Service approved training institution for film making and television production which offers regular, professional and diploma certificate courses in various filmmaking and television fundamentals including film directing and TV presentation and producing. Informal clubs have also emerged to offer training to persons trying to break into filmmaking.

**NOTES**

2. National Film Authority. NFA Main - Film Authority: www.nfa.gov.gh
4. Development and Classification of Film Act, 2016 (Act 935)
GUINEA

Population: 17 million
GDP per capita: US$ 2,564
Median age: 18 years
Urban population: 36.5%
Rural population with access to electricity: 19.7%
Mobile phone subscription: 96.1%
Internet users: 18%
Female upper secondary education completion rate: 12%


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The Ministry of Culture and Historical Heritage (ministère de la Culture et du Patrimoine Historique) is the supervisory institution for the film and audiovisual sector in Guinea.

The Guinean National Office for the Film Industry (Office National du Cinéma Guinéen, ONACIG) has full authority over all economic activities in the film sector and is responsible for ensuring that national heritage and collective memory are preserved and conserved in lasting media.

The High Authority for Communications (Haute Autorité de la Communication, HAC) is the regulatory body for communication services, including the audiovisual industry. It was set up in 2010, replacing the former National Council for Communications (Conseil National de la Communication), within the framework of openness and pluralism in the Guinean press.

The Guinea National Federation of Filmmakers (Fédération Nationale des Cinéastes de Guinée) groups together about ten trade associations.

COPYRIGHT PROTECTION AND PIRACY

The Guinean Copyright Office (Bureau Guinéen du Droit d'Auteur, BGDA) is a public institution of a professional nature with financial autonomy and has been a member of the World Intellectual Property Organization (WIPO) since 2010. Its action and impact appear to primarily concern the music industry. In spite of a reform of the country’s copyright law in 2019, authors continue to bear estimated losses of income of over 50% due to piracy.

PRODUCTION

More than a hundred production companies are registered with the Guinean National Office for the Film Industry. The vast majority are small organizations dedicated to video production.

FILM

Guinea has one of the longest histories of filmmaking on the African continent, having begun with Mouramani (1953) by Mamadou Touré. Guinean cinema really took off after the country gained independence with the creation of Syli-Cinéma in 1967, the government body responsible for the film industry activities within the country. From 1984 onwards, as a result of political changes in the country, public support diminished, and production started to decline.

Among the most renowned Guinean filmmakers are Cheik Doukouré, author of the major popular success Le Ballon d’Or (1994), Moussa Diakité, Mama Keita, Mohamed Camara and Gahité Fofana.

Very few foreign films have been shot in Guinea, but mention should be made of L’Enfant Noir (1994) by Laurent Chevalier, based on the novel of the same name (English editions: The African Child or The Dark Child) by Camara Laye.

TELEVISION AND VIDEO

Local broadcasters, namely the public broadcaster Radio Télévision de Guinée (RTG) and about ten private channels, rarely collaborate with producers of local content. Production companies are mainly dedicated to the production of advertising, corporate and music videos. On rare occasions, international NGOs commission awareness-raising programmes.

DISTRIBUTION, EXHIBITION AND BROADCAST

CINEMA EXHIBITION

Guinea has two cinemas which belong respectively to the CanalOlympia group and to the Institut français de Guinée, which shows films on a regular basis.

FILM AND AUDIOVISUAL POLICY

In the absence of a law on the film industry, the Guinean National Office for the Film Industry (ONACIG) is in charge of laying down the regulatory texts.

This has been carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.
The market penetration of television sets is gradually increasing among households, reaching about 32% in 2019. Most households still primarily receive free-to-air (FTA) channels, with the most common means of access remaining terrestrial analogue television.

The public television channel Radio Télévision de Guinée (RTG) and a dozen private channels comprise the available free access services. The implementation of digital terrestrial television (DTT) infrastructures was launched in 2020.

With regard to the pay television segment, as in other countries of francophone Africa, the international actors Canal+ and StarTimes are well-established and have dominated the market for years.

In Guinea, mobile market penetration reached 110% of the population in 2019. Since the closure of Intercel in 2018, three network providers are competing in the market: Cellcom, MTN and Orange, which launched the first 4G network in 2019. It is estimated that 37% of mobile subscribers had access to the Internet via their mobiles in 2019.

There is no identified source of public funding for the film and audiovisual industry in Guinea. NGOs sometimes call upon small video production organizations in order to produce content for awareness-raising and education programmes. Another small existing source of funding is connected with the sponsorship of commercial brands.

Created in 2014 with the aim of contributing to the revival of Guinean cinema, the Festival des Premiers Films provided a space for promoting the creations of students trained at the ISAG (Institut Supérieur des Arts de Guinée). Although restricted to Guinean filmmakers, the first two editions of the festival were a great success. However, in 2016, the decision was made to open the festival to filmmakers from the rest of Africa and the African diaspora. It became the Festival de la Création Cinématographique de Guinée (FECCIG), holding its 7th edition in 2020.

In addition, the Conakry International Film Festival on the Environment (Festival du Film sur l’Environnement de Conakry, FIFAC) held its 4th edition in 2020.

The Guinea Institute of Arts (Institut des Arts de Guinée, ISAG) also known as the Mory Kanté Higher Institute of Arts (Institut Supérieur des Arts Mory Kanté) is a public training institution under the supervision of the Ministry of Higher Education and Scientific Research (ministère de l’Enseignement Supérieur et de la Recherche Scientifique) which, since its creation, has been striving to provide training in the fields of the visual arts (drawing, sculpture, painting, etc.), music, theatre, film and audiovisual production. The Film and Audiovisual Department has four core programmes including screenplay and direction, camerawork, sound and editing. It provides a three-year course leading to a vocational degree.

ISAG graduates face the prospect of a limited labour market composed of local television stations and small informal production units.
In 1978, the National Film Institute (INC) was founded in order to contribute to the process of the nation’s birth.1 However, in the 1980s, the INC closed down due to a lack of human resources. In 2003, the National Film and Audiovisual Institute (INCA) was set up with new management and organized the National Film Symposium in 2004.

In 2006, the creation of the Guinea Filmmakers’ Association (ACINEGUI), promoted by the INCA, reflected the need for reorganization expressed by filmmakers. The ACINEGUI has around twenty members, including in particular Domingos Sanca, Rui Manuel Costa, Adulai Djamanca, Waldir Araújo, Geraldo Manuel de Pina and Suleimane Bai.

FILM AND AUDIOVISUAL POLICY

There does not seem to be any policy position with regard to film and television. In 2004, the Portuguese Film, Audiovisual and Multimedia Institute (ICAM) and the INCA signed a protocol under which ICAM should support INCA, in particular for the drafting of a law on cinema and the purchase of digital equipment in order to equip two cinemas in Bissau.2

COPYRIGHT PROTECTION AND PIRACY

The Republic of Guinea-Bissau established protection of copyright in the country by means of Decree-Law 46.980 of 28 March 1972, which has yet to be fully implemented. The ARIPO (African Regional Intellectual Property Organization) survey on the status of collective management organizations (CMOs) in ARIPO Member States does not give any information indicating the existence of a copyright collective in Guinea-Bissau.

PRODUCTION

FILM

Between 1967 and 1972, four young Guineans – José Bolama, Josefnah Crato, Flora Gomes and Sana Na N’Hada - were sent to Cuba to receive training in cinema at the ICAIC - the Cuban Institute for the Art and Industry of Filmmaking. The result was a remarkable collectively-made film, O Regresso de Cabral, in 1973.

During this period, cinema was principally of a documentary nature. A few examples, amongst others, are Madina-Boé (Cuba, 1968) by José Massip, Black Labanta! (Italy, 1966) by Piero Nelli and Sans Soleil by the Frenchman Chris Marker.3

After the country’s independence in 1973, the government, which included the Angolan intellectual Mário Pinto de Andrade as Secretary of State for Culture, created the National Film Institute (INC). The most prominent names among the filmmakers of Guinea-Bissau are Flora Gomes and Sana Na N’Hada. In particular, Flora Gomes directed Mortu Nega (1987), The Blue Eyes of Yanta (1992), Po dí Sangui (1996), which was officially selected for presentation at the Cannes Film Festival, Nha Fala, a musical set in Cabo Verde, and A República dos Meninos (2010), which was shot in Mozambique. Sana Na N’Hada co-directed O Regresso de Cabral (1976) with Flora Gomes, and later directed Anos no assa luta (1976), Xime (1994), Bissau d’Isabel (2005), Kadjiye (2013) and Os Escultores de Espírito (2015).

Besides these major figures of Bissau-Guinean cinema, a new generation uses video and visual arts in their work, seeking to present new proposals in the art of filmmaking, such as Vanessa Fernandes, director of Taama ani N’Fa Douwa (2011) and Si Destinu (2015). In 2013, The Battle of Tabatô, shot in Guinea-Bissau by João Viana, born to Portuguese parents in Angola, was recognized and nominated at international festivals, such as the Berlinale. The young filmmaker Filipe Henriques, who studied in Lisbon, won an Emmy in 2014 for his serial, Meu Amo. His film O Espinho da Rosa (2014), a joint Portuguese-Guinean production, won awards at several festivals, including the Zanzibar International Film Festival (ZIFF), the Eerie Horror Film Festival, and the FIC Luanda.

Also to be noted is the performance of Portuguese-Guinean actor and filmmaker Welkê Bungué in Berlin Alexanderplatz, by German director Burhan Qurbani, which made its world premiere in 2020 at the Berlin Film Festival.4

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INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

GUINEA-BISSAU

Population: 2.5 million
GDP per capita: US$ 1,989
Median age: 18.8 years
Urban population: 43.8%
Rural population with access to electricity: 10%
Mobile phone subscription: 79%
Internet access: 3.9%
Female upper secondary education completion rate: 20%

Bungué worked as an actor for over a decade in series such as *Equador*, *Morangos com Açúcar*, *Os Filhos do Rock* and films such as *Joaquim*, *Cartas da Guerra* and *Quarta Divisão*. He is also the author and director of several short films, including *Eu não sou Pilatus*, *Metalheart*, *Corre que pode, Dança quem aguenta*, *Arriga!* and *Exploiter Expropriator*.

Film production in Guinea-Bissau is limited to a few filmmakers who have managed, despite the country’s economic difficulties, to produce feature films over the last four decades. Beyond the more conventional forms, there has been an increase in film and audiovisual production on the basis of amateur and/or semi-professional centres in recent years, the number of which has grown exponentially. These are very low-budget productions, with amateur and non-professional technicians and actors, using technical means that are more affordable for amateur filmmakers and those who are simply interested in filmmaking. It is not easy to map this type of productions, as they are distributed locally (mainly in DVD format). More recently, and thanks to the recent use of the Internet, it has become possible to identify producers through social networks.

**TELEVISION AND VIDEO**

In the field of television, the only existing television channel’s programming is focused on information, and access to satellite and digital platforms is heavily conditioned by the limited economic capacity of the population. The Guinean television station TGB/ECP, created in 1989 in cooperation with Portugal, broadcasts on a daily basis from noon to midnight. Today, most of the content covers political news as opposed to its past tradition of entertainment. With very rare exceptions, television channels do not finance independent productions. Most of their programming is made up of Brazilian and Portuguese content.

There are, however, some exceptions to this situation, such as when TGB/ECP and the Teaho Catho Modja group produced *Cussas di Nô Terra* (2013), directed by Domingos Sanca. Some independent television producers have, on rare occasions, produced content for television, such as Grapo Audiovisual, which produced the film *Clara di Sabura* in 2011. The Televisao comunitaria de Klélé, one of the districts of Bissau, produced the documentary *Tapioca, source of nutrition and support for the family economy* (2013) and *À Lei da Tabanca* (2015), performed by amateur actors. The television production company Candé Produções, in partnership with the Associação Laamten (promotion and dissemination of the Fulani language and culture), has also produced several programmes in the Fulani language.

RTP-Africa, a channel belonging to RTP (Radiotelevisão Portuguesa), mainly broadcasts news about the PALOP (Portuguese-speaking African countries) and the CPLP (Community of Portuguese Language Countries) within the country. It has an office in Bissau which provides daily news from the country.
DISTRIBUTION, EXHIBITION AND BROADCAST

CINEMA EXHIBITION

The CINE LUEMA, associated with the Udibe Football Club, was the only cinema in Guinea-Bissau. It remained in operation until the early 2000s. The small amount of known activity in the field is organised around the Portuguese, Brazilian and French cultural centres, though a downward trend has been noticed.

Like the production sector, cinema screenings have gradually become informal and non-professional. The INCA estimates that in the city of Bissau, which has around 350,000 inhabitants, there are at least 150 film projection spaces with a capacity of 50 to 80 seats. These informal venues offer DVD films on television screens, mainly American titles, Brazilian soap operas and local productions. Even without the necessary formal requirements, this film circuit fosters a rich pool of film enthusiasts, promoting a very distinctive film culture.

BROADCAST

Television viewing has increased over the years in Guinea-Bissau, reaching just under 30% of households in 2019. Almost all television access is provided by means of terrestrial analogue and open broadcasting. Conversion to digital terrestrial television (DTT) has yet to be completed. The international telecommunications companies Canal+ and DStv (MultiChoice) share the small pay television market.

DIGITAL PLATFORMS

Cellular telephone use reached 87% of the population in 2019, with the mobile market shared between the MTN and Orange telecommunications companies. Both operators offer a 4G service, and 28% of mobile subscribers had mobile phone Internet access in 2019, offsetting the low rate of access to fixed broadband services. There is nothing to indicate even limited use of VOD services in the territory.

FUNDING SOURCES AND MECHANISMS

The funding of Guinea-Bissau’s film projects is mainly dependent upon European funding (Portugal, Organisation internationale de la Francophonie, EU-ACP, etc.). The European Union recently financed a short film project within the framework of its cooperation with the Community of Portuguese Language Countries (CPLP) and Timor Leste.

Finally, the CPLP programme aimed at the development of the production and broadcasting of documentaries in the Portuguese language area has also financed the production and broadcasting of documentaries on the nine Member States’ public channels.

PROMOTION

There are no existing film festivals in Guinea-Bissau. The few events organized are principally initiatives undertaken by the existing cultural centres (Portugal, Brazil and France).

In 2015, the Itinerant Portuguese Language Cinema Festival (FESTin), which focuses on Portuguese Language films and has been held annually in Lisbon since 2010, organized additional events in Bissau.

The first edition of the Bissau Film Meeting took place in January 2021. This event is organized by the company KalmaSoul Guine Bissau and the Cultural Center of Brazil.

EDUCATION AND TRAINING

The Amilcar Cabral University has recently introduced a training course offering a degree in information and communication technologies. The Universidade Lusófona Guiné provides training in the field of institutional communication and journalism. The RTP (Portuguese Radio and Television) office in Guinea-Bissau runs short training courses.

Bissau-Guineans wishing to pursue film studies have to obtain scholarships in Portugal, notably at the Universidade da Beira Interior (UBI-Covilhã) and/or take part in African project development initiatives such as the Ouaga Film Lab.

NOTES

5. Source: Dataxis
7. https://festinfestival.com
KENYA


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

There are currently two state agencies specifically tasked with regulating, developing and promoting the Kenyan film industry, both under the Ministry of ICT, Innovation and Youth Affairs, State Department for Broadcasting and Telecommunications.

The Kenya Film Classification Board (KFCB), established under the Films and Stage Plays Act, is mandated to regulate the creation, broadcasting, possession, distribution and exhibition of films by examining and classifying all films, film trailers and film posters using the National Film Classification Guidelines to protect children from consuming adult content; imposing age restrictions on viewership; giving consumer advice; licencing and issuing certificates to film exhibitors and distributors of film; licencing the making of films; and developing classification guidelines, standards and regulations for the film industry. The KFCB also ensures that the watershed rule (no age-restricted content between 5am and 10pm) is adhered to.

In 2015, the Kenya Film Commission (KFC) was established as the government agency tasked with developing, promoting, marketing and archiving in the film industry in Kenya. The Commission outlines strategies to develop the film industry, facilitates the creation of incentives and markets the sector locally and internationally.

For the broadcast and telecommunications sector, the regulatory institution is the Communications Authority (CA). The CA ensures that the 40% local content quota is respected on all TV and radio stations, licences all systems and services in the communications industry, and manages the country’s frequency spectrum and numbering resources.

Finally, The Media Council Act 2013 is an act of Parliament that gives effect to Article 34 (5) of the Constitution and establishes the Media Council of Kenya as the body that sets media standards and regulates and monitors compliance with those standards.

Other active institutions should be mentioned:

- The Kenya Film and Professionals Association (KFTPA) that has supported the development of film policies and incentives.
- The Riverwood Ensemble Filmmakers Association
- The Producers Guild of Kenya, which is a recent association aiming to support governmental sectoral policies
- The Kenya Actors Guild, which consists of actors and mainly deals with the status of the artist through lobbying about funding and advocating for minimum pay, etc.
- The Kenya Writers Guild
- The Association of Animation Artistes Kenya

FILM AND AUDIOVISUAL POLICY

The Government of Kenya, through the KFC, has embraced the sector as a key economic driver, especially on the backdrop of increased digital economy activities and the growth of what it calls “the screen industries” (film, TV, VOD, animation, gaming, etc.).

In 2020, the KFC developed a draft National Film Policy and Bill that is currently under consideration. This policy seeks to establish legal, regulatory and institutional frameworks that will promote a vibrant film industry to foster social, economic and national development.

It seeks to clarify the role of industry players in the achievement of this goal by modifying the current status of the legislative, policy and institutional structure to provide a harmonious framework for the development and regulation of the film industry. The draft policy includes incentives for both local and international productions such as a 30% tax rebate, co-production opportunities, and streamlined production processes.
COPYRIGHT PROTECTION AND PIRACY

Kenyan practitioners estimate that the local film industry loses 25 to 50% of its revenues to piracy. However, laws and regulatory institutions which protect copyright and piracy do exist. The Copyright Act of 2001 established the Kenya Copyright Board (KECOBO) to oversee copyright and related rights in Kenya. It provides copyright holders the exclusive right to control the production, translation, and distribution of their work. KECOBO is a state corporation under the Office of the Attorney General & the Department of Justice. It is responsible for organising legislation on copyright and related rights as well as conducting training programmes on copyright and related rights.

Kenya also counts three Collective Management Organizations (CMOs), although none pertains directly to filmed works. The Music Copyright Society of Kenya (MCSK) is a non-profit CMO for works. The Music Copyright Society of Kenya (MCSK) is a non-profit CMO for works. The Performers Rights Society of Kenya (PRISK) negotiates and sets tariffs with the Performers Rights Society of Kenya (PRISK) negotiates and sets tariffs with the Director of the Kenya National Archives and Documentation Service power to make arrangements for the separate housing of films and other records which need to be kept under special conditions. Subject to any written law prohibiting or restricting the disclosure of information obtained from members of the public and to the provisions of this section, public archives which have been in existence for a period of more than thirty years may be made available for public inspection, and it is the duty of the Director to provide reasonable facilities at such times, and on the payment of the prescribed fees, for members of the public to inspect or obtain copies of, or extracts from, such public archives.

The Performers Rights Society of Kenya (PRISK) negotiates and sets tariffs with the different users of sound recordings and audiovisual works. In respect to any exploitation of works, PRISK administers performers’ rights relating to broadcasting, communication to the public, making available by wire or wireless including transmission to subscribers to a diffusion or any digital service, copying or similar reproduction such as digital copying and any form of use of such works.

Finally, the Kenya Association of Music Producers (KAMP) is a CMO whose role is to administer rights on behalf of their members. They do so by licencing music users (such as television and radio broadcasters, salons, retailers, restaurants, DJs and shopping malls), through the collection of licence fees which are then distributed as royalties. KAMP represents more than 700 music producers in Kenya.

In 2020, KECOBO mentioned the creation of a new CMO for the film industry called Film Rights Achievers of Kenya.

ARCHIVE PRESERVATION

The Kenya National Archives and Documentation Service (KNADS) protects and stores national historical artefacts and documents. The Public Archives and Documentation Service Act gives the Director of the Kenya National Archives and Documentation Service power to make arrangements for the separate housing of films and other records which need to be kept under special conditions. Subject to any written law prohibiting or restricting the disclosure of information obtained from members of the public and to the provisions of this section, public archives which have been in existence for a period of more than thirty years may be made available for public inspection, and it is the duty of the Director to provide reasonable facilities at such times, and on the payment of the prescribed fees, for members of the public to inspect or obtain copies of, or extracts from, such public archives.

PRODUCTION

According to the Kenya National Bureau of Statistics 2019 economic survey, the Kenyan film industry directly employed 129,824 people in 2019, or about 4.5% of the country’s total employed workforce. Out of those, practitioners estimate that 30 to 40% are women. In 2019, the Kenyan film and audiovisual sector contributed an estimated US$110,758,056 to the country’s US$95.5 billion GDP.

FILM

Kenya’s film history can be traced back to the mid-1930s. The country has been a popular destination for foreign producers since the 1950s (pre-independence), thanks to its temperate climate and varied landscapes that include unique sceneries such as the Rift Valley, Mt Elgon, the Indian Ocean, lake Nakuru and Naivasha. The Maasai Mara, Kenya’s famous game reserve, has long been a film location for wildlife documentaries such as NTV Wild by National Geographic and the BBC’s This Wild Life, amongst others.


Today, an average of 100 foreign films or commercial shoots take place every year in Kenya. This has established Kenya as an international filming destination and created employment opportunities for local filmmakers. Various production companies have been formed to service foreign shoots, such as Blue Sky, Ginger Ink, Film Studios and Pontact Productions that has serviced films such as To walk with the lions, Nowhere in Africa, The White Maasai, Heart of Fire, among many others. Due to the proliferation of training opportunities and the decrease in equipment costs, Kenya has experienced an explosion in small production houses which produce content for local TV, advertising, and the video market.

When it comes to the production of local films, Kenya has distinguished itself as a center of excellence for documentary filmmaking in Africa. Kenya’s success in this genre can be explained by the long-lasting presence of NGOs and international media houses in the country, which has provided a consistent influx of both funding and training opportunities to local filmmakers.
In the past two years, the following Kenyan documentaries (the first two produced by Toni Kamau’s We Are Not The Machine production house) won accolades on the world stage: *Softie*, which premiered at the Sundance Film Festival 2021 and won several international awards, including the World Cinema Documentary Special Jury Award for Editing and the Best Documentary Award at Durban International Film Festival (DIFF) 2020; *I am Samuel*, which was screened at several major festivals including HotDocs and BFI London; *The Letter* which was selected and submitted by the Oscars Selection Committee Kenya (OSCK), hosted by the Kenya Film Commission, as the country’s official entry for the Oscars’ best international film category 93rd Academy Awards.  


Two renowned Hollywood actors hail from Kenya: actress Lupita Nyong’o, who won the Oscar for Best Supporting Actress for her role in *12 Years a Slave* in 2014 and has since starred in over 15 films; and actor Edi Gathegi who starred in *Twilight* (2008) and *X Men First Class* (2011). Director Wanuri Kahiu, whose 2018 film *Rafiki* was premiered at the Cannes Film Festival is also an international Kenyan filmmaker. Kahiu is currently attached to several Hollywood projects including the Viola Davis-produced TV series *Wild Seed* for Amazon, Universal’s *The Thing about Jellyfish*, and Disney’s *Once on This Island*. 

![Film Rafiki by Wanuri Kahiu © Melbore Films](image)
Although the films mentioned above (except perhaps Nairobi Half Life) may have resonated more with foreign audiences than with local ones, another segment of the Kenyan film industry has also developed to cater to local viewers usually lower-budget productions shot in vernacular languages. Riverwood, Kenya’s answer to Nigeria’s Nollywood, emerged in the late-1990s when stand-up comedians and thespians started recording their performances using SLR handheld cameras. The contents were then edited and sold on VCDs in shops on River Road in Nairobi and in other towns in Kenya. Between 2009 and 2011, production company Jitu Films attempted to streamline and professionalise this value chain, releasing a string of popular hits,28 selling on VCDs for US$1 including Kenya’s first horror film Otto: The Bloodbath.29 Unfortunately, Jitu Films did not manage to find a sustainable business model due to production costs and rampant piracy. Since then and despite organising itself through the Riverwood Ensemble Filmmakers Association (REFA), which gathers over 200 movie producers, and the Riverwood Academy Awards,30 Riverwood has more or less stagnated.

More recently, with the global transition to online platforms, a few Kenyan films have made their debut on Netflix.31 Disconnect, a romcom directed by Tosh Gitonga, as well as 40 Sticks, Sincerely Daisy and Poacher, which won Best Short Film Award at the 8th Kalasha TV & Film Awards,32 all premiered on the platform in 2020. In total, practitioners estimate that some 500 local films are produced in Kenya annually.

TELEVISION AND VIDEO

In the mid-2000s, Citizen TV was the first local channel to invest in local content, while its competitors continued to air Mexican or Nollywood soap operas. This strategy proved extremely popular, propelling Citizen to a number 1 spot which the station retains to this day. In 2015, the country’s digital migration led to the emergence of dozens of new TV stations, while a 40% local content quota was established by the Communications Authority of Kenya.33 This measure, however, did not mean that more money became available to fund local content, as these new stations are sharing a limited number of advertisers. In fact, practitioners report that commissioning rates have even decreased in the past ten years.

Today, filmmakers can hope to sell their content to local TV stations for between US$907.85 and US$2,270 per episode, while MNet/Maisha Magic offers between US$3,632 and US$4,540 per episode, for long-running local series such as Maisha Mkaanda, Kina,34 Kona, and Maza. Showmax, Multichoice’s VOD service, has also made strides in Kenya. The Kenyan video and OTT market, comprising physical video (DVD, Blu-Ray sales and rental) and digital video (TVOD, EST, and SVOD) presents growth potential, but remains small in volume and revenue. Among the main obstacles to the take-off of the online video market are the lack of payment methods and the low level of broadband penetration, quality, and affordability. The market reached revenues of US$5 million in 2019 and is expected to grow fivefold by 2025.35 In January 2020, Showmax announced the upcoming launch of Crime & Justice,36 its first Kenyan original production in collaboration with Canal+.

Most of Kenya’s top directors, such as Tosh Gitonga and Mbithi Masya, make a living by producing advertising spots for prominent brands, such as Safaricom, Barclays, Coca Cola, Centum, Oracle Kenya, Google Kenya, and Simba.37 However, Kenyan production houses face stiff competition from South Africa on the advertising market, with many global brands choosing to shoot adverts in South Africa and then dubbing them in local languages to target various countries and regions.

TELEVISION AND VIDEO

DISTRIBUTION COMPANIES

Most producers in Kenya present themselves to local or international buyers directly without the help of a distributer. Media Pros Africa is one company that assists filmmakers from conceptualisation to distribution and works to aggregate local content to sell it to broadcasters and VOD platforms.38

CINEMA EXHIBITION

Kenya has 22 cinema screens spread across the country’s three main cities: Mombasa, Kisumu and Nairobi. Cinema exhibitors include Imax, Westgate Cinema, Prestige Cinema, Century Cinemax. Over the years, the Kenya Film Classification Board has strived to revamp a number of cinemas39 in Kenya through the Sinema Mashinini Roll-out (SMR) project.40 Tapping into the creative potential of the youth, the Kenya Film Commission partnered with Kenya Broadcasting Corporation to roll out the Studio Mashinini project, which aims to encourage enterprises in the creative sector by identifying and nurturing talents across the country. The project, which will be rolled across the country, also seeks to facilitate the production of films in vernacular languages, celebrating Kenya’s cultural and linguistic diversity. The Commission has so far donated video cameras to high schools across the country and to local artists.41 It also launched competitions for short films made with mobile phones during the Covid-19 pandemic with prizes of US $925 for the winners.42 Exhibitors, however, are still grappling with finding a workable model in Kenya. They face numerous challenges: infrastructure, legal, regulatory and financial constraints, disorganisation of industry players, the emergence of new technologies and the lack of a skilled workforce. In 2020, the cinema exhibition sector in Kenya, as elsewhere, was deeply affected by the Covid-19 pandemic and subsequent lockdowns.
In Kenya, the penetration of TV sets reached 45% of households in 2019. Most homes essentially receive free-to-air (FTA) channels, mainly through digital terrestrial television (DTT). Kenya is one of the rare markets in Africa where the shutdown of the analogue signal met the International Telecommunication Union’s (ITU) 2015 deadline. The Kenyan broadcast industry has witnessed significant changes since the digital migration took effect, including an increase in population coverage and in the number of TV channels, which reached a whopping 192 (all private except for one public station - KBC). Kenya’s largest FTA stations are Citizen TV (Royal Media Group), NTV (Nation Media Group), KTN (Standard Media Group), K24 (Mediamax Network), and public broadcaster KBC. A 2019 survey by the Kenya Audience Research Foundation (KARF) estimated the number of Kenyan viewers at 9.4 million in 2019. However, Ipsos Synovate counted 6.42 million viewers the same year.

In the pay TV segment, Kenya counts four operators: Startimes, Zuku, DStv and GOtv (the last two both owned by Multichoice), competing over an estimated 3 million pay TV and Video on Demand (VOD) subscribers. The predominance of affordable DTT packages offered by GOtv (MultiChoice) and StarTimes constitutes a particularity of the Kenyan pay TV market, with the number of subscribers to paid DTT services increasing to close to 3.9 million by September 2020.

The Covid-19 pandemic has a profound impact on Kenyan broadcasters as advertising revenues sharply declined, forcing Royal Media Group, Nation Media Group, Standard Media Group and Mediamax Network to reduce their staff in response to the crisis.

**DIGITAL PLATFORMS**

The emergence of Video on Demand (VOD) and Over the Top (OTT) platforms have transformed the audiovisual industry in Kenya in recent years as viewers started to shift to online streaming, pushing traditional media groups to develop their own digital strategies. The rise of digital platforms was made possible by the combined effect of increased internet speeds and lower data costs. Kenya boasts the third fastest internet speed in Africa after South Africa and Morocco, while one GB of mobile internet cost an average of US$1.05 in the country in 2020, making it one of the ten nations with the lowest data costs in Africa. In March 2021, Safaricom announced the launch of trials for 5G technology for its customers. The trials began with both individual and enterprise customers in Nairobi, Kisumu, Kisii and Kakamega. As part of this process, the company plans to expand the number of such 5G sites to more than 150 across nine towns by March 2022. The primary objective during the trial period will be to establish if customers can enjoy speeds of up to 700 Megabits per second, with plans to offer more than 1,000 Mbps later.
According to GSMA, 96% of the Kenyan population already had 3G coverage in 2017. The 4G network is also present in all of Kenya’s 47 counties.

VOD services such as Netflix, Showmax, and the Kenyan Viuasa now purchase local content. A 2020 survey by Ipsos Synovate indicates that paid VOD platforms had already attracted a fifth of the Kenyan adult population, in addition to a high consumption of free YouTube videos. A 2020 report by We Are Social and Hootsuite shows that 17% of Kenyans use social media, making Kenya the third biggest user of social media in Africa after Egypt (42%) and South Africa (37%). Out of Kenya’s 8.8 million social media users, 89% use WhatsApp, 81.7% Facebook, 58.4% YouTube, 37.4% Facebook Messenger, 37.3% Instagram, and 34.4% Twitter. Snapchat, LinkedIn, TikTok, Skype, Pinterest, Telegram and Vimeo are also used in the country. Social media is increasingly becoming a valid source of revenue for Kenyan creators, with many of them now opting to distribute their content online rather than selling it to traditional broadcasters. In January 2021, YouTube announced the 20 winners of its inaugural Black Voices Creators Class, which included four Kenyans. All winners are set to receive funding and mentoring to continue growing their channels.

Finally, mobile service providers Safaricom, Airtel (Airtel TV), and Telkom (Telkom LIT) also have their own mobile video stores. However, when it comes to video, mobile operators are still struggling to compete with the plethora of free content available on social media sites, as well as with other VOD services.

### FUNDING SOURCES AND MECHANISMS

#### PUBLIC FUNDING

Public funding has recently become available to Kenyan filmmakers. In 2020, the Kenya Film Commission (KFC) launched its first film fund, dubbed the Film Empowerment Programme. With a budget of US$454,000, the programme aims to provide grant support for the development of feature films, documentaries and TV concepts; the production of feature films and documentaries; and to assist filmmakers with marketing and festival costs. The goal is to finance 25 projects per year on average through this scheme. In the same year and in an effort to shield filmmakers from the effects of the Covid-19 pandemic, the KFC also announced it would fund one short film employing at least 20 people in each of the country’s 47 counties.

#### INTERNATIONAL GRANTS

For the past 15 years or so, Kenyan filmmakers have also benefited from privileged access to a number of international grants programmes and NGO funding schemes, helped by the country’s status as a regional hub for many development organisations. Sources of international film or documentary funding have included the Kenya Media Programme funded by Dutch development aid organisation HIVOS, Movies that Matter, the Global Film Initiative, Cinereach, the Ford Foundation’s Just Films (Softie), the Hotdocs Blue Ice Fund (also Softie), or the World Cinema Fund Africa (Rafiki), among others. Although these international grants are technically available to most African filmmakers, writing a successful application is a complex process that often involves the ability to set up international co-productions, and can only be managed by experienced producers. Docubox, a local film fund launched by renowned director Judy Kibinge and supported by HIVOS, The Ford Foundation, and the British Council, has been instrumental in providing both funding and training to local documentary filmmakers.

In television, many prominent local programmes such as The XYZ Show, Makutano Junction, Shamba Shape Up, Know Zone, The Team, Tazama!, or MTV Shuga, have over the years received the support of international development organisations. Although this type of funding, which was at one point prolific, contributed to the creation of many innovative, good quality programming and to the training of an entire generation of film and audiovisual professionals in Kenya, it also skewed Kenyan audiovisual production towards edutainment for many years.

#### PRIVATE FUNDING

Apart from the KFC and international organisations, corporate entities such as Safaricom or Airtel also provide grants for filmmakers in Kenya or can support production budgets through sponsorship or brand placement. Pay TV operators such as DStv/Multichoice, Zuku or StarTimes, but also local free-to-air broadcasters do commission or purchase content from filmmakers, comedians and other creators. Local commercial banks also offer loans for producers, although their stringent collateral requirements make it difficult for filmmakers to qualify. Despite a clear dynamism in the Kenyan film and audiovisual space, profitability remains elusive, and so far the sector has failed to attract private equity financing.

#### PROMOTION

The country counts 17 annual or biennial film festivals, attracting an estimated 27,000 attendees every year. Some of the most prominent film festivals include the NBO Film Festival, the Slum Film Festival, the Human Rights Watch Nairobi Film Festival, Rock ‘n’ Roll Film Festival, and the Kenya International Sports Film Festival.
Kenya also hosts the Riverwood Academy Awards, the Kalasha International Film and TV market, and the Kalasha Awards, which recognize the best productions and talents in the film and audiovisual sectors.

EDUCATION AND TRAINING

In the past couple of years, and thanks to a big push from both the Kenya Film Commission (KFC) and the private sector, filmmaking training programmes have multiplied across the country. Today, an estimated 1,000 students graduate every year with certificates, diplomas and degrees related to film or broadcast. While the quality of training has dramatically improved across the board, the downside is that the number of graduates surpasses available jobs and many have to rely on self-employment or opt for alternative careers.

PUBLIC INSTITUTIONS

Several public institutions such as the University of Nairobi (UoN), Moi University, the Kenya Institute of Media and Technology (KIMT), the Kenya Institute of Mass Communication (KIMC), Multimedia University of Kenya (MMU), and the Kenya Film School, a talent-based educational institution established under the Ministry of Information and Communications Technology (ICT), all offer various diploma or degree programmes related to film, media and even animation. In 2020, the Kenya Film Commission (KFC) also unveiled an initiative aimed at developing a country-wide audiovisual curriculum that will be taught at Technical and Vocational Education and Training (TVET) institutions.

PRIVATE PROGRAMMES

Private institutions such as Daystar University, United States International University (USIU), Zetech University, or Mount Kenya University, also offer diplomas and degrees in film production or media studies. Launched in 2020 in partnership with the French animation school Rubika, the Africa Digital Media Institute (ADMI) offers professional, degree or certificate programmes in various film-related subjects, but also in newer disciplines such as mobile app and game development, animation, and motion graphics. ADMI credits its hands-on technical training and rigorous apprenticeship process for a 90% placement rate.

In addition, a number of private programmes offer short film courses and workshops. Some of the best-known ones include the MultiChoice Talent Factory and the Film Pro Series, which trained 143 filmmakers from across East Africa through 13 specialized workshops between 2018 and 2020. Between 2009 and 2019, One Fine Day Films, an initiative supported by German film director Tom Tykwer, offered training to local filmmakers through its selective Masterclass programme, which led to the production of many of Kenya’s best films, such as Supa Modo, Kati Kati, or Nairobi Half Life.
LESOTHO

Population: **2.3 million**
GDP per capita: **US$ 2,768**
Median age: **24 years**
Urban population: **28.6%**
Rural population with access to electricity: **37.7%**
Mobile phone subscription: **113.8%**
Internet users: **29%**
Female upper secondary education completion rate: **37%**


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

In 2017, local film producers with support from Sesotho Media & Development, established the Motion Pictures Association of Lesotho (MPALE),¹ in order to advocate for the development of the film sector in the country. The organisation counted about 30 members in 2018.

**FILM AND AUDIOVISUAL POLICY**

There is no regulatory framework or policy currently in place in Lesotho related to the film and audiovisual sector. Film licences are currently not required for foreign productions to be shot in the country. In consequence, the newfound interest in Lesotho generated by the success of recent international films such as *The Forgotten Kingdom* (2013) and *This is Not a Burial, It's a Resurrection* (2019) are not currently being exploited.

However, in 2018 the country’s new National Strategic Development Plan (NSDP)⁴ for 2019-2023 identified the creative industries as a key strategic development sector. The NSDP mentions the development of a content policy, including the establishment of local content quotas on all platforms (TV, mobile, etc.), the introduction of incentives such as tax rebates, the improvement of access to finance, and various capacity building and promotion measures.

**COPYRIGHT PROTECTION AND PIRACY**

The NSDP recognises Lesotho’s need to completely review and overhaul its Intellectual Property framework, develop a Copyright Policy, and create Copyright collective management systems to support its creative industries. It also plans for enforcement agencies and government officials to receive education and training in Intellectual Property law and appreciates the need to improve overall industry compliance. Copyright is however protected through international and regional copyright Treaties and Conventions. The principal national legislation regulating copyright and related rights is the Copyright Order No 13 of 1989, which provides for the protection of original works of authorship in literary, artistic and scientific works.

**PRODUCTION**

**FILM**

Lesotho’s film sector is modest but has the potential to grow. Local practitioners estimate that less than ten people currently make a living from filmmaking in the country, with a couple dozen more being involved on an intermittent basis. The most stable source of activity remains producing documentaries for NGOs, while a few filmmakers also produce short films (such as *Mapule’s Choice*⁵ (2008) or *The Lost Cause*⁶ (2017) to show at film festivals.

However, in recent years, the striking mountainous landscapes of the “Kingdom in the Sky” have provided the backdrop to a few well-received international productions, sparking a new interest in Lesotho as a shooting location. *The Forgotten Kingdom,*⁷ shot in 2011 and released in 2013, received numerous awards at festivals across Europe and the United-States as well as seven nominations and three wins from the African Movies Academy Awards (AMAA). Director Andrew Mudge insisted on shooting in Lesotho despite the rough terrain and lack of infrastructure. While the crew and equipment had to be sourced from South Africa, several students from Limkokwing University in Lesotho had the opportunity to work as interns on the set.

In 2018, a trip to Lesotho inspired Hollywood director Ryan Coogler to prominently feature the country’s iconic blankets in his blockbuster film *Black Panther.*⁸
In 2019, Mosotho filmmaker Lemohang Jeremiah Mosese released his autobiographical documentary *Mother, I Am Suffocating. This Is My Last Film About You* to international acclaim. The same year, Mosese's debut feature film *This Is Not A Burial, It's A Resurrection,* premiered at the Venice film festival and was later screened at the Sundance film festival. It became the first film in Lesotho's history to enter the Academy Awards competition for Best Foreign Film. This is Not A Burial was made possible through a co-production agreement with financing from South Africa and Italy. Finally, documentary filmmaker Tehobo Edkins, a South African who grew up in Lesotho and makes the majority of his films there, has represented Lesotho at many international festivals.

**TELEVISION AND VIDEO**

The public channel Lesotho Television (LTV) periodically has open tenders for filmmakers, but local practitioners report that such opportunities are rare. Apart from the LTV tenders, television in Lesotho operates on a barter model, which means that producers seeking to have their content broadcast need to purchase airtime from the channel and then look for a sponsor to cover the cost. However, services like Netflix or Showmax are theoretically available in the country, and local mobile providers Vodacom and Econet also offer mobile video streaming solutions Video Play (Vodacom) and Econet Webcast (Econet).

**CINEMA EXHIBITION**

Since the closing of Ster-Kinekor cinemas at Pioneer Mall Cinema in Maseru, there have been no theaters in Lesotho. Sesotho Media & Development operates mobile cinema units (4×4 vehicles with screening equipment and power supply) that hold screenings in communities across the country, as well as a film Resource Center in Maseru.

**BROADCAST**

In Lesotho, 36% of households had access to TV in 2019, mostly through digital terrestrial television (DTT) as the DTT migration started in 2015 and is now close to being completed. Lesotho Television (LTV) is the country's public and only national TV station. However, by virtue of being geographically surrounded by South Africa, South African television channels are also freely available in Lesotho. In the pay TV segment, MultiChoice (DStv) is the frontrunner.

**DIGITAL PLATFORMS**

Access to fixed or mobile digital video platforms is limited in Lesotho due to the country’s mountainous terrain. However, services like Netflix or Showmax are theoretically available in the country, and local mobile providers Vodacom and Econet also offer mobile video streaming solutions Video Play (Vodacom) and Econet Webcast (Econet).
FUNDING SOURCES AND MECHANISMS

There is no public nor private funding available for filmmaking projects in Lesotho. Aspiring filmmakers can hope to learn and practice their craft by periodically producing documentaries for NGOs (such as Rise International), or corporate videos, which have storylines that are aligned with their programmatic goals.

PROMOTION

Since 2011, Sesotho Media & Development has been the organiser of the Lesotho Film Festival, which is attended by some 600 people every year. The festival, which takes place over four days, is geared towards social issues and receives an average of 25 submissions from local filmmakers annually.

EDUCATION AND TRAINING

Film and audiovisual training in Lesotho is very limited. The only school offering undergraduate courses on topics related to filmmaking in the country is the Maseru branch of Limkokwing University College of Creative Technology, a private Malaysian institution.

The NGO Sesotho Media & Development, and creative technology lab The Hub, also regularly host masterclasses on specific subjects such as screenwriting or sound engineering for a limited number of students in the context of the Lesotho Film Festival. However, these classes are dependent on the availability of donor funding and thus do not take place every year. Finally, the Maseru Film Club also organises regular training workshops.

NOTES

2. Lesotho Communications Authority: Broadcasting https://www.lca.org.ls/broadcasting/
3. Facebook: Motion Picture Association of Lesotho https://www.facebook.com/MotionPictureAssociationofLesotho1934019043537947/
5. Soul City Institute: Lesotho - Mapule’s Choice https://www.soulcity.org.za/mobilisation/regional-project/the-untold-series/countries-information/lesothomapuleschoice-
The main representative body of practitioners of the Liberian film industry, is the Liberian Movie Union. The TV broadcast sector is regulated by the Liberia Telecommunications Authority.

FILM AND BROADCAST POLICY
According to stakeholders’ questionnaires and interviews, there is no law, bill or policy pertaining to the film and broadcast sector in Liberia.

COPYRIGHT PROTECTION AND PIRACY
With a piracy rate of around 80%, it is estimated that piracy costs the government around US$2 million per year. The Liberia Intellectual Property Act of 2016, which governs copyright protection in Liberia, has yet to be fully implemented. The law is enforced by the Liberia Intellectual Property Office (LIPO), a government agency under the Executive Branch responsible for the development and promotion of intellectual property policies, including the protection of rights deriving from intellectual activity.

The Copyright Society of Liberia, which is a part of LIPO, is responsible for the organisation, administration, collection and distribution of royalties from the broadcast and distribution of all mechanical rights deriving from the creative sectors in Liberia.

In recent years, the Liberian Movie Union in collaboration with LIPO has taken actions and developed a policy to combat piracy. These measures have included banning the sale of CDs that have multiple movies on one disc. A task force was also instituted to visit stores and seize illegal films.

PRODUCTION
Practitioners estimate that the revenues generated each year by the film and audiovisual sector fall between US$30,000 to US$1 million. Practitioners also estimate that there are between 8 to 20 production companies in the country, providing 40 to 50 direct jobs and 100 to 2,500 indirect jobs.

FILM
The Liberian movie industry, sometimes also referred to as Lollywood, is particularly small. During and after Liberia’s 12-year civil war, the country saw a slow trickling of foreign news crews coming to cover the conflict and its aftermath, including the election of Ellen Johnson Sirleaf, the first female president in Africa. The end of the war in 2003 brought an increased inflow of foreign movies especially from Nigeria and Ghana. Some Liberians, who trained in filmmaking in these neighboring countries, came back after the war to set up a fledgling Liberian film sector. For example, 2Rich Productions, a Liberian production company owned by Richard Dwumoh, incubated its stars outside Liberia.

In 2014, Liberia was hit by the Ebola crisis. With the closing of the country’s borders, the import of foreign movies was greatly reduced and Liberian audiences turned their interest towards homegrown productions. Local production increased to meet demand, with multiple movies being released on DVD every month, most of them comedies. 2Rich Productions claims to have employed up to 200 people during this period. One of the company’s most popular films, Killer Bean and Falcao, sold 20,00 to 30,000 copies as well as an unknown volume of counterfeits, compared to the average 3,000 legitimate copies that a good Liberian film might have hoped to sell before the epidemic.

Other films released during the period include Good Girls Gone Bad, Behind Bars, Last Wedding and The Redeemer Of The Gollas. After Liberia was declared free of the virus in 2016 and the country reopened, the import of foreign films resumed and Lollywood’s output reduced drastically. Today local filmmakers lack funding, expertise, and equipment. Practitioners nonetheless estimate that around 20 to 100 low-budget movies are still produced every year in Liberia.
Recent releases in 2020 include *Wheel and Deal* (2020) directed by Alexander Wiaplah, Gardea Mayon’s *Tight Spot* (2020), and *Tutumatu* (2020) by Artus Frank.

While Liberian-born actors such as Van Vicker and Frank Artus have achieved some fame in Nigerian and Ghanaian films, Liberian filmmakers have not yet made it to the international scene or had their movies screened at international festivals. Liberia is also not a film destination for foreign shoots, nor have there been any well-known international films shot in the country, and in consequence local crews cannot benefit from training opportunities that international crews might bring.

One exception is *Silas* (2017), a film on Liberian land rights by Canadian director Anjali Nayar which premiered at the Toronto International Film Festival.10

**TELEVISION AND VIDEO**

While local broadcasters can license and commission local content, it is rare. Local TV content includes news, films and shows aimed at the youth. The Liberian music industry has also shown more growth than the film industry, and as a result, emerging Liberian filmmakers can sometimes find work producing music videos.

**CINEMA EXHIBITION**

Liberia had four cinemas in the capital Monrovia in the 80s and early 90s. However, the civil wars destroyed or resulted in the closure of most cinemas,11 as well as of the dam that provided electricity to most of the country.

Today, there is only one cinema with two screens,12 operated by Silverbird.13 The venue has remained closed since the onset of the Covid-19 pandemic. Prior to that, cinema-going culture had been largely stagnant in Liberia. An alternative to modern cinemas are the local video clubs that show everything from football matches to released movies on projected screens.

Most local movies do not get released in cinemas. On some occasions, the cinema is rented out for the premiere of a local movie, but the film does not stay on the cinema listing. An example is the movie *Wheel and Deal* by Alexander Wiaplah, which premiered at Silverbird cinemas but did not stay on as the cinema was closed at the time of the release.

**BROADCAST**

TV household penetration remains low in Liberia, reaching 29% in 2019.14 Countrywide DTT migration is still unclear. There are six TV stations,15 state-owned LNTV and privately owned Sky TV, RTV, Hot TV, Clar TV, Power TV.

Pay TV is dominated by international operators DStv (Multichoice), SATCON and NanaSat.

**DIGITAL PLATFORMS**

Internet penetration remains low in Liberia. According to the UNDP, the number of internet users stands at 8% of the total population, while mobile phone subscriptions reach 56.6%.
VOD services like Netflix are available in Liberia, but they are not popular. High internet and data prices in relation to the earning capacity16 of the average Liberian means that most cannot afford digital VOD services.

While there is a local VOD service called Monro TV,17 it is not widely used. Additionally, mobile operators do not have mobile video stores.

**FUNDING SOURCES AND MECHANISMS**

There is no public government funding for Liberian filmmakers, and while they are technically eligible for international grants, practitioners say that they have not been able to access this type of funding.

However, NGOs sporadically fund documentaries and even films. While TV broadcasters can commission or license filmmakers, practitioners note that this is rare. Most of the funding for filmmakers comes from private sources, with most films being self-funded.

**PROMOTION**

Few film festivals are held in Liberia. They are usually hosted or funded by NGOs,18 or international aid partners.19 Example are the EUROLIBERIA film festival,20 which is hosted and funded by the European Union delegation to Liberia, and the KD Film Festival. Additionally, the Liberian Film Institute holds small film festivals to showcase the work of its students. Some festivals also take place periodically based around a specific event, such as the festival on electoral reform issues organized in 2019 by iCampus and Accountability Lab.18

**EDUCATION AND TRAINING**

Public and private institutions in Liberia do not offer diploma or degree programmes in film and audiovisual training. However, a number of universities and other higher education institutions offer programmes in communications. Additionally, schools like the Peter Quaqua school of journalism also offer a diploma programme in journalism.21

Short training programmes are available for filmmakers, such as the Liberia Film Institute four-month programme in filmmaking,22 with courses including sound scoring, video editing, and shooting. Students interested in film making also learn through apprenticeships, or go to other countries to learn.

**NOTES**

1. Liberia Movie Union. About Us page: https://liberiamovieunion.com/aboutus/
2. Liberia telecommunications authority: https://www.lta.gov.lr/about/
5. Copyright society of Liberia: Who we are: https://cosinfo.com/whoweare/
17. Monro TV: https://www.monrotv.com/
LIBYA

<table>
<thead>
<tr>
<th>Population: 7.6 million</th>
</tr>
</thead>
<tbody>
<tr>
<td>GDP per capita: US$ 15,174</td>
</tr>
<tr>
<td>Median age: 28.8 years</td>
</tr>
<tr>
<td>Urban population: 80.4%</td>
</tr>
<tr>
<td>Rural population with access to electricity: not available</td>
</tr>
<tr>
<td>Mobile phone subscription: 91.5%</td>
</tr>
<tr>
<td>Internet users: 21.8%</td>
</tr>
<tr>
<td>Female upper secondary education completion rate: not available</td>
</tr>
</tbody>
</table>


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The Libyan film sector is officially under the responsibility of the Tripoli Cinema Organisation, linked to the Ministry of Culture. No information on representative institutions or associations of filmmakers is available.

FILM AND BROADCAST POLICY

The country does not have a film or audiovisual policy. In 2017, the UNESCO Maghreb Office launched the project “For the Strengthening of a Gender-Sensitive Film Sector in the Maghreb-Machrek”, as part of the implementation of its Action Plan for gender equality, its support for freedom of expression, and the diversity of cultural expressions, in all countries of the MENA region including Libya. The project includes sensitisation of national public entities supporting the development of film and the creative industries in the region in order to integrate a gender-sensitive approach, as well as support to professional women in the sector and to film and audiovisual schools.1

COPYRIGHT PROTECTION AND PIRACY

Libya is a member country of the Berne Copyright Convention, and joined the World Intellectual Property Organization in 1976. According to the Institute for Law and Justice Studies in Arab Societies, a text dating from 1968 protects copyright. However, there is no structure to regulate or enforce intellectual property in Libya.2

PRODUCTION

FILM

The history of cinema in Libya begins, with the production of a few short films and documentaries. After independence in 1951, the Kingdom of Libya made some short films on the ancient city of Leptis Magna, for tourism purposes. In 1959, the Ministry of Information created a film department, touring the country with documentaries and newsreels in 16mm. The Ministry of Education also produced some educational films. Despite the relative lack of film production, film consumption was extremely popular as entertainment.

The country's first cinema was established as early as 1908. From the 1940s to the mid-1960s, Libya had a large number of cinemas: between 14 and 20 in Tripoli and 10 in Benghazi. The first feature films shot in Libya were directed by foreign filmmakers, such as Albert Herman with A Yank in Libya (1942) or Guy Green with Sea of Sand (1958). The first Libyan feature film, Abdella Zarok’s When Fate Hardens / Destiny is Hard, appeared in 1972. In 1973, the General Council of Cinema was founded to manage cinema in Libya.

Foreign films were dubbed into Arabic. Most home movies were documentaries, and social realism was promoted as an ideal for fiction films. The few other Libyan films of the time are The Road (1974) by Mohamed Shaaban, Battle of Tigrift (1983) by Mushafa Kashem and Mohamed Ayad Driza, The Bomb Shell (1985) by Mohamed Ferjani which won awards outside Libya, and Symphony of Rain (1994) by Abdallah Zarok. The General Cinema Council, which continued to operate until 2010, made around 20 to 25 short films and documentaries, and supported some feature films made in the 1970s and 1980s.

A production company called Rays was created and it produced five Egyptian films with Egyptian actors and actresses, notably Earth of fear.1 According to local critic Ramadan Salim, a total of six feature films and a hundred documentaries were made in Libya, but few people saw them. The films, however, cannot be traced.4 Two well-known films in Libya were both directed by Hollywood-based Syrian Moustapha Akkad, with actor Anthony Quinn.

The first and most notorious is The Message, an expensive account of the birth of Islam. A few years later, Akkad shot Lion of the Desert, a biopic of Libyan hero Omar Mukhtar. Like The Message, it was a commercial failure, but both films have been screened regularly by Libyan television since their release.

Film production declined overall. The institute started to struggle with a massive amount of debt and unpaid salaries and was dissolved in the early 1990s. It was officially cancelled in 2002.5
After the 2011 revolution and the fall of Gaddafi, a general desire to reassert itself has gripped Libyan cinema. Thanks to a new openness towards the idea of filmmaking, a number of short documentaries were produced both independently and by organisations. The Ministry of Culture opened a department of Cinema and Theatre which held various activities until 2014. During that time, several workshops and training programmes took place, but the lack of an industry and of cinema halls remained major obstacles.

Young Libyan filmmakers have started to offer a new perspective on society through short films, thanks to the support of the British Council and the Scottish Documentary Institute. The short film 80 (2012), which combines documentary and animation and is directed by the young 25-year-old director Muhannad Lamin, was selected by the Locarno festival in 2016, for example.\(^6\) 80 was produced completely independently, separate from the Scottish documentary institute which screened the film in their workshops. In 2019, Lamin directed another short film, Prisoner and Jailer.

**TELEVISION AND VIDEO**

Faced with the reality of a non-existent film industry, most Libyan film school graduates redirect their efforts towards TV, advertising or other fields. However, Libya's new TV stations do not play a role in the development of creative content in Libya.

In consequence, many aspiring filmmakers have shifted towards digital platforms and social media for quicker production and quicker feedback. Today a large group of videographers and online content creators share their films on Youtube or on video platforms such as Alkul, Alwaw.\(^7\) The decline of experienced film technicians who were previously sources of knowledge has also increased the gap between theory and practice for young filmmakers, and digital platforms are more forgiving when it comes to artistic and technical quality.
The media landscape in Libya is fluid: many Libyans are enjoying the unprecedented freedoms that are newly open to them.

Today Libya has two public channels, Libya Al-Wataniyah TV and Libya Al-Rasmiyah TV, distributed by the Libya Radio and Television Corporation (LRTC), and about 20 private television channels10 (including Libya Al Ahar TV, and Libya TV), which broadcast from Libyan cities and media centers in the Middle East. The number of channels continues to increase, despite concerns about their financial viability.11

Regarding pay television, the number of subscribers remains marginal in a market characterised by the lack of infrastructure and the dominance of piracy. Practitioners estimate that Libya has about 300,000 Pay TV and VOD subscribers. The pay TV leaders are the same as in the rest of the Middle East North Africa (MENA), beIN and OSN, accounting for 98% of pay TV subscribers in 2019.12

DIGITAL PLATFORMS

The Internet penetration rate in Libya stood at 46.2% in January 2021, with 3,19 million subscribers.13 Mobile penetration has exceeded 100% of the population for more than ten years and reached 168.1% in 2021, with 11.62 million subscribers. The market is shared between Al Madar and Libyana. 4G services were launched in 2017, although access to 4G subscriptions remains marginal.

VOD streaming platforms (Netflix, Showmax, CanalPlay) are available in the country. Netflix is popular due to the Libyan audience’s interest in Western content,14 however most people use pirating sites to download films and series for free. Few actually subscribe to a streaming service due to the online payment issues in Libya. The two local VOD services operating in Libya are Alkul and Alwaw.

FUNDING SOURCES AND MECHANISMS

Libya does not offer public funding for film. Filmmakers’ only source of finance is the regional funds offered by Culture Resource (Mawred Al Thaqafi), the Doha Film Institute and the Arab Fund for Arts and Culture (AFAC). Director Lamin is a beneficiary of these funds that enabled him to produce his first fiction in 2019, Prisoner and Jailer.15

PROMOTION

Immediately after the fall of the regime in 2012, a number of creative events sprang up in Libya, including the International Mediterranean Film Festival for Documentaries and Short Films. However, few have survived to this day.

In December 2017, Erato, a human rights film festival, was launched in Tripoli. Erato1 aims to support the making of short films with cutting-edge techniques and to encourage young people passionate about cinema to take an interest in human rights as well.16

EDUCATION AND TRAINING

There is very little training in cinema or television available in Libya. The Faculty of Fine Arts and Media of the University of Tripoli offers courses in script, cinema and animation through its department of visual arts.17 The Advanced Institute of Art Techniques in Tripoli is an arts institute that offers courses in screenwriting, directing and sound engineering. In 2012, the Tripoli Academy of Artists said it trained between 100 and 150 film students each year.18
The Malagasy film industry is under the supervision of the Ministry of Communication and Culture. It is the body responsible for defining the strategy for the implementation of national film policy and managing the cinema support fund. Created in November 2019, it replaced the National Office of Cinema and Motion Pictures (Office national du cinéma et de l’image animée, OMAM)\(^1\), a public industrial and commercial establishment.

The Special Commission on Audiovisual Communication (Commission Spéciale à la Communication Audiovisuelle, CSCA) has been in existence since 1994 and temporarily acts as the High Council for Audiovisual (Haut Conseil de l’Audiovisuel, HCA) which will be introduced. The HCA is a “coordination and monitoring body”. It is also “guarantees the freedom of audiovisual communication and the independence, impartiality and equal treatment of audiovisual communications companies”.\(^4\)

New audiovisual legislation adopted in 2016 provides for the creation of the National Regulatory Authority for Media Communication (Autorité Nationale de Régulation de la Communication Médiatisée, ANRCM), “tasked with examining tenders for the awarding of radio and television broadcasting licences and with awarding operating licences for audiovisual communications companies”\(^5\).

With regard to professionals, various unions and associations encompass players in the audiovisual and film sector in Madagascar.

**FILM AND AUDIOVISUAL POLICY**

The adoption of Act No. 010/2017 on national film policy in 2017 was well received by professionals in the sector. On the whole, it defines itself as a “legal and institutional framework” enabling the State to initiate effective actions to meet the sector’s socio-economic needs. This legal instrument aims to regulate the sector, to introduce a professionalisation mechanism for players and to structure a technical and financial support system for the industry. However, despite the relatively cross-section consultation of the sector prior to its creation, the system needs to be implemented.

The national film policy (loi de Politique Nationale du Cinéma)\(^6\) was repealed on 15 July 2019\(^7\) by order of the High Constitutional Court (Haute Cour Constitutionnelle).\(^8\) But the new text to govern the film and audiovisual sector is some time coming and the sector remains beset by internal divisions and undermined by piracy.

**COPYRIGHT PROTECTION AND PIRACY**

The Malagasy Copyright Office (Office Malagasy du Droit d'Auteur, OMAM)\(^9\) is the guarantor of the protection of the moral and material interests of Malagasy and foreign authors and their beneficiaries. Created in 1984, the OMDA is under the supervision of the Ministry of Communication and Culture, and under the financial supervision of the Ministry of Finance.

Professionals estimate that losses due to piracy can represent over 75%. The problem of piracy strongly impacts audiovisual content but it meets audience demands in the absence of formal and legal distribution channels. Indeed, it is through informal and unregulated channels that films and music are broadcast in the country’s most isolated areas. Nevertheless, this causes serious harm and financial losses to artists, creators and beneficiaries.

The authorities have sought to address the problem by establishing an anti-piracy brigade (Brigade anti-piratage, BAP).\(^10\) But the initiative has been seen by the majority of professionals in the sector as a “tax inspection tool”.

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1. The Malagasy Centre for Cinema and Motion Pictures (Centre Malagasy du Cinéma et de l’Image Animée, ISSM) is under the supervision of the Ministry of Communication and Culture. It is the body responsible for defining the strategy for the implementation of national film policy and managing the cinema support fund. Created in November 2019, it replaced the National Office of Cinema and Motion Pictures (Office national du cinéma et de l’image animée, OMAM)\(^1\), a public industrial and commercial establishment.

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**INSTITUTIONAL FRAMEWORK**

**MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS**

The film and audiovisual industry in Madagascar is under the supervision of the Ministry of Communication and Culture\(^1\), tasked with developing the national film policy, the application of laws and the implementation of policies and programmes arising from legislative objectives. The Ministry is responsible for the development of policies to support the Malagasy film industry, television and news media and for the application of international joint production agreements.

The Malagasy Centre for Cinema and Motion Pictures\(^2\) (Centre Malagasy du Cinéma et de l’Image Animée, ISSM) is under the supervision of the Ministry of Communication and Culture. It is the body responsible for defining the strategy for the implementation of national film policy and managing the cinema support fund. Created in November 2019, it replaced the National Office of Cinema and Motion Pictures (Office national du cinéma et de l’image animée, OMAM)\(^3\), a public industrial and commercial establishment.

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**MADAGASCAR**

Population: **35.6 million**
GDP per capita: **US$ 1,646**
Median age: **19.6 years**
Urban population: **37.9%**
Rural population with access to electricity: **0%**
Mobile phone subscription: **40.6%**
Internet users: **9.8%**
Female upper secondary education completion rate: **6%**


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This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.
PRODUCTION

In 2018, some 279 professionals were registered with the OMACI, including 39 actors, 84 filmmakers, 52 producers, 16 distributors, 5 festival organisers and 22 video game operators. The OMACI also listed 61 audiovisual production companies. But these figures represent just a marginal proportion of all the players working in this sector largely dominated by the informal economy.

FILM

Some Malagasy films have made it onto the "list of films that have marked the history of African cinema" notably The Accident (1972) by Benoît Ramampy, Very Remby (1973) by Solo Ignace Randrasana, and When the Stars Meet the Sea (1996) and Tabataba (1988) by Raymond Rajaonarivelo.

In the early 2000s, the fiction feature film Revy sa ditra Fiainana (2003) by Laza was classed as a film d’artiste thanks to its "aesthetic and artistic qualities". He was also the director of the documentary Fragments de vie (2011) shown at numerous international festivals.

The 2010s saw the first fruits of the incubation work at the Rencontres du Film Court (RFC) festival founded in 2006. Madama Esther (2014), a short film by Luck Razanjaona, won the Silver Colt (Poulain d’Argent) award at Fespaco in 2015. Le Glas (2011) by Ludovic Rianando Randriamanantsoa marked a turning point in the production of television series in Madagascar. Filmmaker Sitraka Randriamahaly, for his part, remains a big name in the animation sector and regularly represents Madagascar at a large number of international events in the field.

A few solidarity initiatives have also succeeded in raising the profile of Malagasy cinema and giving it a new face, notably thanks to the documentaries Ady Gasy (2014) and Zanaka, Thus Spoke Félix (2018) by Lova Nantenaina. The latter won the Silver Colt award at the 26th edition of Fespaco in 2019. Malagasy Mankan y a.k.a Legends of Madagascar (2012) by Haminina Ratovoarivony, a road movie that made its début at Fespaco in 2013, was broadcast to a wide audience in Europe and the United States where the director lives. In 2017, Haminina Ratovoarivony returned to the famous Ouagadougou festival to present another fiction, Antanananivo, tao ianao (2015). Within the diaspora, Marie-Clémente Paes has been noted for her documentaries Songs for Madagascar (2017) and Fahavalo, Madagascar 1947 (2018) which she produced with César Paes.

TELEVISION AND VIDEO

We are seeing a rapid expansion of video production in family and entrepreneurial contexts, although there is no official estimate of their number. These entirely informal productions create a large number of jobs for Malagasy youths who seize employment opportunities and technical training options, which are both accessible and inexpensive.

The production of audiovisual content for private individuals and companies (advertising spots, institutional films, music clips, films for private use, etc.) has grown substantially since the 2000s. The most well-known include the Dzaomalaza series of educational films funded by UNICEF, and produced by the duo Rado Andriamaniasa and Mam phihasina Raminosoa. The latter runs one of the largest institutional film operators, DCC (Digital Development Communication). These films provide a growing opportunity for many filmmakers.

In the music industry, a generation of music clip directors has shaken up the sector. The most notable include director Towomanana Rabarison, who has combined music and history in his production, and José Rakotobe, who has transposed the codes of cinema to the music clip sector.
However, production of events videos remains without doubt the most prolific and has skyrocketed in recent years, notably thanks to the advent of social networks and, as elsewhere, the desire to share and communicate in images using increasingly diverse formats.

With regard to the production of television content, producers have to pay to have any hope of their programme being broadcast on TV. The early 2000s were marked by the arrival of series, and particularly telenovelas, onto the Malagasy TV stage. The first, Sangodimpanina, was launched in 2002 and rebroadcast in 2006. It features 150 episodes lasting 26 minutes. Numerous others followed: Sorona (2004), broadcast on TV Plus in 20 episodes; Ankamantatra (2006) broadcast on TV Plus in 36 episodes; Kintan’ny Paradisa (2005); Mandza in 25 episodes, produced and broadcast on TVM; Tandrify (2004); Jiaby Jiaby (2005); Ditra manadala (2011); and Saro-bahana (2013).

But only a handful of producers have been able to maintain regular production. Among these are Scoop Digital, which has established itself in the production of TV serials since 2009, Horizon Production, and Maki Prod which produces Benja Kely 2 (2017) with an estimated budget of over US$30,000, which is considered a substantial budget. Ducker Image, which notably produced Apocalypse (2003), is not as active as those previously mentioned, but has established itself in the 3D sector and its work in film animation deserves particular attention.

Also of note, the channel Canal+ Madagascar launched an ephemeral channel, Novegasy, from July to October 2017, with the goal of showcasing local content and to promote the “best of Malagasy fiction”. Since March 2020, Novegasy has become a permanent channel and funds the production of the series it broadcasts. This initiative has instilled a new dynamic in the TV series sector and has allowed professionals in the industry to diversify their content and reach a broader audience.

**DISTRIBUTION, EXHIBITION AND BROADCAST**

**DISTRIBUTION COMPANIES**

Distributors are estimated at a dozen professionals primarily working in the distribution of VCDs and DVDs.

**CINEMA EXHIBITION**

In 1972, there was 40 cinema theatres in Madagascar located in the capitals of the provinces. In 2007, there were only 11 left in the entire country and today, Madagascar only has 4 working cinemas: the Plaza Ampefihoa, a large theatre with 800 seats refurbished in 2018; Cinépax Ambodivona opened in 2018, the first multiplex built in the centre of Antananarivo with four screens each with 80 seats; Canal Olympia Iarivo which opened in July 2019; and lastly, the cinema at the Malagasy Film Institute (Institut français de Madagascar, IFM), in the centre of the capital with 350 seats.

Programming remains primarily comprised of U.S. blockbusters and exceptionally Malagasy and African films, with the exception of the IFM cinema which screens recent fiction and heritage films, animated films and documentaries, films for young audiences, and opera and theatre recordings.

The Alliances Françaises network in Madagascar also runs occasional screenings depending on the capacities of each structure. Open-air screenings are regularly organized as part of the Rencontres du Film Court (RFC).

**BROADCAST**

The presence of television sets in households remains relatively low, reaching barely 18% in 2019. The majority of households in Madagascar still receive free-to-air (FTA) channels, with the most common access being terrestrial television. The transition to DTT was scheduled for June 2015, but its roll-out is slow to take place.

The democratisation of the media in the early 90s marked a major turning point in the development of the local industry. TV compensates for the lack of cinemas and creates an audience that, in addition to the foreign films that dominate programming schedules, also offers the possibility of increasing Malagasy content.

The study on media development in Madagascar (Étude sur le développement des médias à Madagascar) conducted by UNESCO in 2017 mentions a dozen TV channels, of which one public and national, Télévision Malagasy (TVM). As in other countries of francophone Africa, the French operator Canal+ holds the largest share of the audiovisual market, but the arrival of Startimes, Canal+’s main competitor, has helped develop offers that better respond to the needs of television viewers.

**DIGITAL PLATFORMS**

Mobile use reached 32% of the population in 2019. The market is shared between four operators: Airtel, Blueline via its mobile brand BIP, Orange Madagascar and Telma. 38% of mobile subscribers had access to the Internet via their mobile in 2019. Fibre-optic Internet continues to be rolled out and is leading to new consumer habits in terms of audiovisual content.

At the regional level, the platform Ol-Film VOD provides access to independent cinema in the Indian Ocean. It offers a film catalogue that covers the islands in the Indian Ocean but also plans to extend its coverage to other countries in the area, particularly Mozambique, South Africa and India. Netflix and Showmax platforms are available to a modest number of subscribers.

Since March 2021, the production company Be mozik specialized in music production has launched the platform Be Mozik Web-TV on YouTube, featuring a large number of Malagasy films. Access to the films is free. This is a first initiative in terms of the use of digital platforms to broadcast local films.
The Rencontres du Film Court (RFC)29 is a film production aid system for national production26 and up until 1995 a Tiasary (Tahiry Iombonana Anohanana ny Sarimihetsika Malagasy) support fund27 existed. These public funds are no longer operational, which means that professionals do not have access to public funding.

The Serasary Fund28 to support production, an initiative of the Madagascar Rencontres du Film Court established in 2011 and since suspended, aimed to support projects for quality films. Other existing sources of funding are the NGOs that finance educational and awareness-raising content and, for more accomplished projects, the Organisation internationale de la Francophonie and ACP-EU support systems.

In 2012, the association Rencontres du Film Court organized the Antananarivo International Human Rights Film Festival (Festival International du Film de Droits Humains d’Antananarivo), in partnership with the European Union and Alliance Ciné. Only one edition of the festival was held, and screened 20 outstanding films that address human rights issues. The Rencontres Documentaires de l’Océan Indien (DAC-OI), primarily focused on training, was held once in 2015.30

EDUCATION AND TRAINING

No film schools exist in Madagascar. Various projects have been initiated in this area, but none have come to fruition. Several initiatives led by private institutions have enabled professionals to improve their skills in the film and audiovisual sector. The private institute E-Media runs film profession-related courses but no complete curriculum. Workshops on film professions as part of the Rencontres du Film Court have helped support professionals for the last fifteen years.

The Profiler firm founded by the filmmaker Lova Andriambololoninirina has positioned itself as a major player in film profession training for the last three years and provides à la carte training courses that meet the needs of film professionals.

In her book Les Cinémas de Madagascar (1937-2007), Karine Blanchon identifies six Malagasy film directors that attended foreign film schools, but since 2010, this number has been growing thanks to the various partnerships put in place to support the emerging dynamic in Malagasy cinema, allowing three young filmmakers to receive scholarships to the École Supérieure des Arts Visuels de Marrakech (ESAV) international school31 in 2010, granted by the Institut Français de Madagascar.

NOTES


7. https://lexpress.mg/03/04/2019/cinemaacapronie-grandissanteaoutedelomac


11. https://www.awotele.com/2016/07/02/lacheminadelconnaissance-descin%C3%A9maurofraicafrique/


18. Interview with Monique Rahajarizafy (Chair of the association BRIGAD for the preservation and safeguarding of audiovisual heritage) Clapboard, TV Plus. March 28, 2018.


25. https://www.youtube.com/channel/UC4hsD3wzX9z5sP2sE5g


31. https://esamarskech.com
MALAWI

Population: 24.8 million

GDP per capita: US$ 1,060

Median age: 18.1 years

Urban population: 17.2%

Rural population with access to electricity: 3.7%

Mobile phone subscription: 39%

Internet users: 13.8%

Female upper secondary education completion rate: 13%


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

Malawi’s film and audiovisual industry, and the wider Department of Arts, are under the responsibility of the Ministry of Tourism, Culture and Wildlife. Malawi does not have a Film Commission, but a Censorship Board (established with the Censorship and Control of Entertainment Act of 1968) is in charge of delivering film and exhibition licences and of rating movies.

Meanwhile the broadcast sector falls under the Ministry of Information, and is regulated by the Malawi Communications Regulatory Authority (MACRA).

In terms of professional organisations, the Film Association of Malawi (FAMA) was established in 2011 to bring together and coordinate the country’s various film stakeholders. FAMA is a membership organisation, with a mandate to build capacity through training and forums that encourage knowledge-sharing, support the production of local films, improve the quality of local productions, and preserve Malawian culture through film.

FILM AND AUDIOVISUAL POLICY

The Malawi Growth and Development Strategy II (2011-2016) earmarked cultural development as an important sub-theme for sustainable economic development, and cited the cultural industry as a dynamic sector with the potential to support long-term economic growth. Recognising the lack of technical and entrepreneurial skills in the Malawian creative sector, it made provisions through its Integrated Arts Development Project (IADP) for the establishment of an Arts School, and the enhancement of the capacities of the Arts Savings and Credit Cooperative (SACCO) and the Arts Production and Marketing Cooperative (APMC). The government is also planning to set up a post-production studio in partnership with the Malawi Communication and Regulatory Authority.

In addition, the Investment and Development Strategy for the Film Industry in Malawi (2015-2020) highlighted several challenges affecting the growth of the film industry in the country, including the absence of a cultural policy. In 2014, UNESCO supported through the International Fund for Cultural Diversity (IFCD) a two-year project entitled Building a Viable and Sustainable Film industry in Malawi, aimed at creating a strategy for investment and development. The project led to the adoption of a new national cultural policy, developed in line with the Film Association of Malawi’s strategic plan which operationalises the Malawi Growth and Development Strategy II (2011-2016) and contributes to the Economic Recovery Plan, in the context of Vision 2020.

COPYRIGHT PROTECTION AND PIRACY

The Copyright Society of Malawi (COSOMA) was established in 1992 and currently implements the Copyright Act of 2016. Its mandate is to promote and protect the interest of authors, composers, performers, producers of sound recording and broadcasters, as well as collect and distribute royalties or other remuneration on behalf of the rights holders. In consequence, COSOMA’s activities span Collective Management, Law Enforcement and Copyright Administration.

A 2013 study conducted by the Government of Malawi through COSOMA, in collaboration with the National Statistics Office and the United Nations’ World Intellectual Property Organisation (WIPO) estimated the economic contribution of copyright-based industries in Malawi at about 3.46% of the Gross Domestic Product (GDP). Stakeholders believe that between 50 and 75% of revenue is lost to piracy in the country, because of an overall lack of awareness of Intellectual Property Rights by stakeholders and a lack of resources needed by law enforcement agents to implement anti-piracy measures.

PRODUCTION

The government estimates that the industry may indirectly support up to some 800,000 jobs and contribute US$1,564,491 to the country’s GDP.
FILM

Cinema entered Malawi in 1948. For a couple decades after Malawi’s independence in 1964, most of the films produced were documentaries on Malawian football and on the country’s first prime minister Kamuzu Banda. In the 1980s, a few notable films were made, including Aubrey Kalitera’s To Ndirande Mountain With Love, which was the first local movie to show at the cinema, and Chris Kamlongera’s Mtengo Wa Moyo (Tree of Life). However, in the 1990s attempts at establishing a local film sector faltered, due to the influx of foreign films.

In the past 15 years, a few Malawian filmmakers have started to draw inspiration from American and Chinese movies, but also from the more-relatable success of Nollywood, to produce films that have attracted attention both locally and at international festivals. This led to a growth phase in Malawian cinema, with some 30 local films (sometimes called Mollywood) now being produced annually. Charles Shemu Joyah is one of Malawi’s renowned filmmakers. Joyah’s productions include the award-winning Seasons of a Life (2010), The Last Fishing Boat (2013), and The Road to Sunrise (2017), which was the first film from Malawi to be submitted in the Foreign Language Oscar category. Other award-winning directors include Joyce Chavula (No More Tears, 2013; Lilongwe, 2015; and Nyasaland, 2016), Flora Suya (My Mother’s Story, 2016), Chimwemwe Mkwezalamba (The Designer, 2013), Tawonga Taddja Nkhonjera (B’ella, 2014), Ernest Chikumi (Shoe Shiner, 2016), and comedian and HIV-AIDS campaigner Michael Usi (Dr. Manga 1 and 2; Living on Perfume, 2009; and Watch Out, 2010).

In 2019, the country had its first encounter with Hollywood when it welcomed the shoot of Chiwetel Ejiofor’s The Boy Who Harnessed the Wind, based on the true-life story of William Kamkwamba, who built a windmill to save his village from drought.

It is estimated that the film industry has employed 500,000 and 800,000 directly and indirectly respectively, and contributes US$1,518,987.24 to the country’s economy annually.

TELEVISION AND VIDEO

As is usual in many nascent markets and in the absence of a funding or revenue model for film, young professionals interested in filmmaking gravitate towards the few opportunities that exist to practice their craft by producing adverts and corporate, music or wedding videos.

The number of private television networks has exploded in recent years in Malawi, with 17 private channels currently in operation. The television sector still functions on the barter model, meaning that producers are required to purchase airtime from the station (typically by bringing an advertisement on board) to broadcast their content. Despite the establishment of a 40% local content quota for broadcast the persistence of the barter system prevents any significant investment from broadcasters into the local content ecosystem. Still, some filmmakers have managed to produce popular shows and soaps, including Ashukile Mwakisulu’s Choices, Flora Suya’s Spouses and Workmates or Michael Usi’s Tikuferanji (What are we dying for?).

When it comes to pay TV, the MultiChoice channel dedicated to the region - Zambezi Magic - is dominated by Zambian content. Practitioners believe that MultiChoice does not perceive the quality of Malawian content to be sufficiently high to be shown on their channel.
CINEMA EXHIBITION

In the 1980s and early 1990s, Malawi counted 13 cinemas. By 1996, all had run out of business, due to the country’s worsening economic situation and the invasion of pirated foreign films on video, including from Nollywood. Today, only four screens remain in the entire country.

Nonetheless, during the same period small video viewing shops have sprouted around the country’s townships and peri-urban market centers. Despite the evolution of the market towards more home-viewing for the most well-off, video viewing shops continue to attract crowds, confirming the appeal of culturally relevant and easily-accessible content for the Malawian audience.

BROADCAST

Due to the country’s low level of urbanisation, television penetration remains low in Malawi, reaching around 11% of households in 2019. Malawi Broadcasting Corporation (MBC) and its channel Television Malawi (TVM) is the only public broadcaster. The country also boasts 17 private stations – including Times Group, Timveni, Adventist and Beta – which broadcast on the Digital Terrestrial (DTT) network which was implemented as early as 2013. DStv dominates the small pay TV market with StarSat (StarTimes), Zuku (Kenya) and GOtv (MultiChoice), competing with channel Television Malawi (TVM) is the only public broadcaster. The country also boasts 17 private stations – including Times Group, Timveni, Adventist and Beta – which broadcast on the Digital Terrestrial (DTT) network which was implemented as early as 2013. DStv dominates the small pay TV market with StarSat (StarTimes), Zuku (Kenya) and GOtv (MultiChoice), competing with

DISTRIBUTION, EXHIBITION AND BROADCAST

DIGITAL PLATFORMS

With the advent of digital technology, the video rental shops of the 1990s gave way to the sale of pirated VCDs, which are now in the process of being replaced by streaming. However, although 4G has arrived in Malawi’s big cities through operators Airtel and TNM, the cost of data still makes it prohibitive for most people to watch video content online. Netflix and Showmax are available in the country.

FUNDING SOURCES AND MECHANISMS

Public or structured funding for film does not exist in Malawi, forcing many filmmakers to self-finance their productions. A few NGOs also sporadically commission documentaries, whose storylines are aligned with their programmatic goals. The Investment and Development Strategy for Film Industry in Malawi (2015-2020) indicated the need for a National Film Fund, which up to date has not been established.

PROMOTION

Malawi hosts four annual or bi-annual film festivals. They include the Malawi Film Festival, a socially-minded event with screenings taking place in schools and churches and include discussions on topics such as women’s rights and environmental and climate change, and Lilongwe Shorts, organised by the Film Association of Malawi in partnership with the Lake of Stars arts festival.

EDUCATION AND TRAINING

There is no public university in Malawi offering specialised film or audiovisual programmes. A few private institutions offer media or theater-related diplomas such as the Malawi Institute of Journalism, or the University of Malawi Chancellor College, which has a Bachelor of Arts in Communication and Cultural Studies (BACCS), and a Bachelor of Arts in Media for Development (MFD). Practitioners say that the institutions are poorly equipped and resourced, limiting their ability to impart the necessary technical skills to students. More recently, a few private colleges, universities or arts centres (such as Dikamawoko Arts, in Blantyre) have also attempted to introduce short courses on film or TV production. Two notable examples are the “Film in a Box” training workshop organised by the African Movie Academy Awards (AMAA) in 2013, and the highly-rated MultiChoice Talent Factory, which held one physical event in the country and is now accessible to Malawian students online.

NOTES

15. LLWshorts: Info. https://llwshorts.wordpress.com/about/
17. University of Malawi, Chancellor College. https://www.cc.ac.mw/faculty/humanities
The Mali National Filmmakers’ Union (Union Nationale des Cinéastes du Mali, UNCM) is the national organisation bringing together Mali’s film and audiovisual industry professionals.2

**FILM AND AUDIOVISUAL POLICY**

Law No. 98-037-RM of July 20, 1998 sets the framework for Mali’s cinematographic policy. In particular, it confers to the CNCM the mission of ensuring the regulation and control of cinematographic activities. In this capacity, it issues operating visas, film shooting authorisations, professional cards and controls the ticket office in cinemas. The CNCM is also responsible for monitoring cooperation agreements with several countries, including France, the Netherlands, Denmark, Morocco, Germany and Cuba.

There exist no established quotas for local content, or any other incentives for encouraging production in Mali.

**COPYRIGHT PROTECTION AND PIRACY**

The Malian Copyright Office (Bureau Malien des Droits d’Auteur,BUMDA), created in 1978, is the public institution responsible for the protection of copyright and related rights and for combatting piracy. The service is administratively attached to the National Directorate of Arts and Culture (Direction nationale des Arts et de la Culture, DNAC).3 Financial losses due to piracy are difficult to estimate, but they undoubtedly constitute a significant shortfall for stakeholders.

**TELEVISION AND VIDEO**


**DISTRIBUTION, EXHIBITION AND BROADCAST**

Until the 1990s, Mali had 25 cinemas, but there are now only two: Magic Cinéma, previously the weak link in the Malian film industry. In 2013, Danish Cooperation provided a unit to fulfil this role, and thus save directors from having to go abroad in order to finish their films. Thanks to this postproduction unit, Mali has gained production autonomy.

**PRODUCTION**

**FILM**

Malian film production is among the most awarded in Africa. Among the most prolific directors are Souleymane Cissé who notably directed Baara (1978) (Tanit d’Argent at the Carthage Film Festival and Étalon de Yennenga at FESPACO), Yeelen (1987) (Jury Prize at Cannes), Waati (1995) (Official Selection at Cannes). Also, Cheikh Oumar Sissoko who directed among others Guimba the Tyrant (1995), Étalon de Yennenga at FESPACO, and Adama Drabo who directed Taafé Fanga (1997) selected for the Directors’ Fortnight at Cannes.

There are more than forty production organisations, the most important of which are Les Films Cissé / SisseFilimu, Kora Films, Brico Films, Sarama Films, Les Films du 7, Banko Productions, Warafilms, Looba - SARL, and Vortexgroup. Average annual film production is estimated at two feature films and around twenty short films, to which must be added a few school films and about ten animated films. However, films of an institutional nature and reports are not taken into account in this production.

The country hosts a few shoots of international productions per year on its territory. However, a major advance should be noted in postproduction, which was previously the weak link in the Malian film industry. In 2013, Danish Cooperation provided a unit to fulfil this role, and thus save directors from having to go abroad in order to finish their films. Thanks to this postproduction unit, Mali has gained production autonomy.

**INSTITUTIONAL FRAMEWORK**

**MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS**

The cinematographic sector is under the supervision of the Ministry of Culture through the Mali National Center for the Film Industry (Centre national de la cinématographie du Mali, CNCM). The High Authority for the Audiovisual and Communication Industry (Haute Autorité de l’Audiovisuel et de la Communication, HAC)4 is responsible for regulating the audiovisual sector.

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**Mali**

Population: 27 million
GDP per capita: US$ 2,327
Median age: 16.3 years
Urban population: 43.1%
Rural population with access to electricity: 25.4%
Mobile phone subscription: 115.1%
Internet users: 13%
Female upper secondary education completion rate: 10%


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

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1. High Authority for the Audiovisual and Communication Industry (Haute Autorité de l’Audiovisuel et de la Communication, HAC)
2. The Mali National Filmmakers’ Union (Union Nationale des Cinéastes du Mali, UNCM)
3. Malian Copyright Office (Bureau Malien des Droits d’Auteur, BUMDA)
4. High Authority for the Audiovisual and Communication Industry (Haute Autorité de l’Audiovisuel et de la Communication, HAC)
Moreover, the Itinerant Digital Film initiative (Cinéma Numérique Ambulant, CNA), which is present in many African countries, above all in West Africa, enables the screening of films in urban, peri-urban and rural areas.

**BROADCAST**

The Office de Radio Télévision du Mali (ORTM) is the main public broadcasting operator with 2 channels. According to data collected by the Mali High Authority for the Communication Industry (Haute Autorité de la Communication du Mali, HAC), there are 25 authorised commercial TV channels in the country and five non-commercial channels. Most of these are general interest channels, but there are also specialised channels, some of which are denominational. ORTM occupies a quasi-monopolistic position as the only national broadcaster, followed by Africable, a pan-African channel.

The process of transition from analogue to digital terrestrial television (DTT) is being implemented through the Malian Transmission and Broadcasting Company (Société Malienne de Transmission et de Diffusion, SMDT). The transition to full digital for all Malian television stations is planned for the end of 2021. The pay television market has been dominated by Canal+ for years. The Chinese telecommunications company StarTimes, as well as local players operating MMDS have a small share of the market.

**DIGITAL PLATFORMS**

Mobile telephony continues to increase its market penetration and already reaches 111.5% of the population. Orange and Malitel operate growing networks, mainly in urban areas.

Fixed broadband remains negligible with less than 1% of households accessing the internet via a fixed connection in 2019. Mobile internet has around 13% of users. Despite the lack of organisation of the sector, local mobile applications are beginning to exist, such as Amap-Kurukan®, which offers a small selection of films and series.

**FUNDING SOURCES AND MECHANISMS**

A support fund for the film industry was set up in 2018. The first call for projects launched at the end of 2020 in the framework of the fund selected six projects in the course of development, six projects in production and one project in postproduction. As elsewhere, the COVID-19 crisis has deeply affected the film and audiovisual sector. In 2020, the State announced an emergency support fund to compensate for the loss of income for cultural and creative enterprises as a whole, including the film industry. The urgent support measures recommended include the exemption of cultural enterprises and organisations from levies and taxes; subsidisation of up to 50% of fixed costs for cultural enterprises and organisations; subsidisation of the wage bill for key personnel in cultural enterprises; support for communities and local authorities for maintenance work on heritage buildings and the reimbursement of 50% of the expenses incurred for suspended cultural events.

**EDUCATION AND TRAINING**

Education and training offers in the film and audiovisual sector is at an embryonic stage, which constitutes a major challenge for development of the sector. The Balla Fassalé Kouyaté Conservatoire of Multimedia Arts and Occupations (Conservatoire des Arts et Métiers-Multimédias de Balla Fasséké Kouyaté) proposes courses on the film industry, television and its various professional occupations.

The Mali National Centre for the Film Industry (Centre National du Cinéma Malien, CNCM) inaugurated a studio-school known as Le Bourgou in 2016, whose aim is to provide training for film professionals. A programme in film and audiovisual technique by the Education-Training Incubation Centre - Studies & Services (Centre d’incubation Éducation-Formation - Études & Services, EDUFORM-CABINET) has existed since 2016, in partnership with the Private University of Management and Applied Technologies (Université Privée de Management et de Technologies Appliquées, UPM2T). Its objectives include “strengthening technical and professional skills in the film and audiovisual industry and training academics wishing to embark on film and audiovisual careers”.

All of these training courses, however, suffer from insufficient structure and continuity, since they are often dependent upon external initiatives and input. Malian industry professionals continue to express a real need for quality training in accordance to international standards.

**NOTES**

1. www.haca.ma
3. https://bmda.ma/info/nos-partenaires-bumda-(mali)
8. https://niarela.net/societe/culture/eduformcabinet-des-opportunitiess-de-formation-aux-metiers-du-cinema-et-de-laudiovisuel
In 2012, the government adopted the Law on the Protection of Literary and Artistic Rights (Loi relative à la protection droits littéraires et artistiques), which refers in a generic manner to producers of video recordings and audiovisual broadcasting bodies.

**PRODUCTION**

Industry professionals estimate that there are 12 production companies active in the country, providing 200 direct jobs and an annual shooting average of ten local films and two foreign films.

**FILM**

After its glory days in the 1970s, Mauritanian cinema has slowly declined in this country of 3.4 million inhabitants. The historical figures of Med Hondo and Sidney Sokhona, and their modern counterpart, Abderrahmane Sissako, for the most part built their careers abroad. Mohamed (Med) Hondo is generally considered a pioneer in this field. He made films that achieved outstanding success at the international level. Soleil Ô (1970), in which he denounced racism, won a Golden Leopard award at the 1970 Locarno Film Festival. Bicots-Nègres, vos voisins (1973, English: Arabs and Niggers, Your Neighbours) is a major social portrait of immigration. West-Indies (1979) questions the slave trade since the 18th century, Safrana ou la parole (1976) reconstructs the epic of the Queen of the Azna, on the basis of griots’ narratives. Sidney Sokhona is the author of Safrana ou le droit à la parole (1978, English: Safrana or Freedom of Speech).

The most internationally renowned Mauritanian filmmaker is Abderrahmane Sissako, director of La vie sur Terre (1998, English: Life on Earth) and Waiting for Happiness (2001), a film about the dream of migration which won the Étalon d’Or at the 2003 FESPACO Pan-African Film Festival. In 2006, his film Bamako highlights the social drama caused by the structural adjustment programmes imposed by international organizations. In 2015, after winning several Césars, Timbuktu was nominated for Best Foreign Film category at the 87th Academy Awards.
Within the country, a few voices are trying to emerge in a context that is scarcely inclined to support expression in the art of filmmaking, by making short films produced with the means at hand. Among the most dynamic of these, is the Media Plus production company run by the producer and filmmaker Sidi Mohamed Cheiguer which, using its own funds, recently produced eight short films by young authors participating in workshops organized by the Maison des Cinéastes filmmakers’ centre. Some of the authors-directors of short documentaries and fictional films, including Wassim Korbi, Salem Dendou, Abderrahmane Lahy, Moussa Dicko and Amal Saad Bouh, were featured in a Mauritania Focus at the Lausanne African Film Festival in 2020. Mention should also be made of Sidi Mohamed Cheiguer Junior, Mohamed Echkouna and Deddah Abdallah, who had the opportunity of presenting their films at the Visions du Réel Festival in 2017.

A few foreign films have been shot in Mauritania over the years, including amongst others Fort Saganne (1984) by Alain Corneau, Le Cinquième élément (1997, The Fifth Element) by Luc Besson, Le Peuple migrateur (2001, Winged Migration, also known as The Travelling Birds or The Travelling Birds: An Adventure in Flight in some English-language releases) by Jacques Perrin and, more recently, the Italian documentary Il Corpo della Sposa (2019, Flesh Out) by Michela Occhipinti, presented in the Panorama section of the Berlinale the same year. The documentary Beyond Territories (2017) about Abderrahmane Sissako, produced for the Franco-German channel Arte and directed by Valérie Osouf, can also be cited.

TELEVISION AND VIDEO

As elsewhere, the production companies dedicated to the production of advertising, music videos and corporate films are numerous and constitute an informal market where young people work. No figures exist in this flourishing market.

With regards to television, the existing television channels in Mauritania do not play any visible role in the local production of creative content. Producers are obliged to pay or offer their films free of charge in order to have them broadcast. However, the 2020 series Le Chameau des temps (30 episodes) and the 2011 series La Famille (29 episodes), are both produced with funding from the Ministry of Culture.

DISTRIBUTION, EXHIBITION AND BROADCAST

CINEMA EXHIBITION

There has been no commercial cinema in the country for some time. The Institut français of Mauritania is the sole option for the screening of films. Exceptionally, as in the case of the Mauritanian premiere of Timbuktu by Abderrahmane Sissako, an international conference room for screenings is adapted for the circumstances. The room at the Biodiversity Space (Espace de la biodiversité) in Nouakchott has also been equipped with a screen by the Maison des Cinéastes filmmakers’ centre, and a private cinema is currently being opened.
In 2002, Abderrahmane Lahy created the Maison des Cinéastes filmmakers’ centre and is striving to bring about the birth of a film culture and industry in Mauritania. His aim is the dissemination of a cinema which reflects the reality of the country and its culture and civilisation, through the training and social and cultural commitment of filmmakers.

**BROADCAST**

In Mauritania, the market penetration of television sets is progressing slowly, reaching about 46% of households in 2019. Channel reception consists almost exclusively of free-to-air (FTA) channels. Most access is provided via direct-to-home (DTH) satellite, as in neighbouring countries of the Maghreb. The digital transition, launched in 2016, is slow to be finalised.

Since 2011, the sector has been liberalized and there are now five private television channels providing political debates, documentaries, reporting and cultural programmes. Since its creation, the TV de Mauritania (TVM Al Mouritaniya) has given birth to four other channels, namely Al Moutinaiya 2 (closer to the youth), Al Mouritaniya Al Thakafiya (cultural channel), Al Mouritaniya Al Riyadiya (sports channel), and the parliamentary channel. Programmes are provided in national languages.

International telecommunications companies take the bulk of the small pay television market, namely Canal+, beIN and, with a minor market share, MultiChoice (DStv). Since its creation, the TV de Mauritania (TVM Al Mouritaniya) has given birth to four other channels, namely Al Moutinaiya 2 (closer to the youth), Al Mouritaniya Al Thakafiya (cultural channel), Al Mouritaniya Al Riyadiya (sports channel), and the parliamentary channel. Programmes are provided in national languages.

The mobile communications sector is organized around three network providers: Move, Mattel and Chinguitel.

The growth of mobile internet in Mauritania is less marked due to the low bandwidth of the networks in service. The country has 1.56 million internet subscribers in January 2021, representing a growth of 14% between 2020 and 2021 and a penetration of 33.1% of the population. Nevertheless, the country had 208,239 subscribers in 2013.

**DIGITAL PLATFORMS**

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**FUNDING SOURCES AND MECHANISMS**

No public funding for cinema and audiovisual is available for film producers in Mauritania. However, the High Authority for the Press and Audiovisual Industry (HAPA) supports audiovisual productions for local broadcasting. Thus, for the past two years, a series for broadcasting on public television has been produced annually, with a majority of public funding. Apart from occasional support from NGOs for institutional orders, most local production is conducted on a self-production basis and with the producers’ own funds.

**PROMOTION**

There are two film festivals in Mauritania, namely the Nouakshort Film Festival organised since 2006 by the Maison des Cinéastes filmmakers’ centre, which in particular presents films from the younger generation.

In 2021, the first edition of the Omeme (Nations) Festival is being held on the subject of human rights, also organised by the Maison des Cinéastes. Other occasional events are organised by the Institut français of Mauritania and its partners.

**EDUCATION AND TRAINING**

There are no public or private institutions providing education and training in the field. Within the framework of its regular activities, the Maison des Cinéastes filmmakers’ centre organizes short workshops, which the majority of young filmmakers have had the opportunity to attend. For the past two years, the Institute of Fine Arts and Architecture (Institut des Beaux-Arts) has been planning to set up training courses in the field of the film and audiovisual industry. The initiative is slow to materialise and no date has been set for its launch.

**NOTES**

2. https://www.rirm.org/hapa haute autorité de presse de l’audiovisuel/
4. https://www.rirm.org/hapa haute autorité de presse de l’audiovisuel/
5. http://www.musicafrica.net/node/72099
7. https://www.musicafrica.net/node/72099
10. http://www.filmdocumentaire.fr/4DACTION/w_fiche_film/50634_1
17. http://mauriweb.info/node/7515
produces its own corporates and small films. It manages and runs several Short Film Festivals per year, organised around a central theme, focusing mainly on young, emerging and new filmmakers, and school children.

In addition, the Economic Development Board (EDB), under the Ministry of Finance, as part of its mandate to ensure greater coherence and effectiveness in implementing growth policies, was established in 2013 (then under the old Board of Investment BOI), to oversee the Film Rebate Scheme, assisting filmmakers with a variety of permits and permissions.\(^2\)

When it comes to stakeholder representation, the Motion Picture Forum of Mauritius (MPFM) is a trade organisation dedicated to the promotion and defense of the legal, economic and creative interests of filmmakers throughout Mauritius.\(^3\) Its activities include the representation of filmmakers, the marketing of films and audiovisual content, and their publication on digital media and online channels. The Mauriwood Film Industry Artists Association is a non-profit organisation which promotes and supports the emerging film industry in Mauritius and in the Indian Ocean to create employment.\(^4\)

For the broadcast sector, the promulgation of the Independent Broadcasting Authority Act led to the setting up of the Independent Broadcasting Authority (IBA).\(^5\) The Authority manages the emerging Mauritian landscape which includes private, commercial and community broadcasters. It regulates this sector by granting licences and ensuring that broadcasters preserve and promote the plural nature of the Mauritian society.

**Film and Broadcast Policy**

The most important piece of policy is the Mauritius Film Rebate Scheme, which was established in 2013, offering a Rebate of 30% on Qualifying Expenditure, and expanded in 2016 to offer a rebate of up to 40% on qualifying expenses. This film rebate scheme, one of only two in sub-Saharan Africa, has the ambition to position Mauritius as a leading global film destination.

The MFDC Regulations of 2001 stipulate the laws that filmmakers ought to adhere to while shooting in Mauritius.\(^6\) This includes securing an authorisation from the MFDC, the presentation of a synopsis of the film, detailed information on the proposed dates and locations of shooting, the names of the crew members, and the equipment and props to be used. Visiting crews travelling are allowed entry to Mauritius, receiving work visas on arrival at the airport. Film crews must have work permits issued by the local Service Film production and a letter of authorisation from the relevant authorities.\(^7\)

Finally, the export of locally produced films is exempted from VAT. The Mauritius Revenue Authority (MRA) also exempts customs duty on the importation of film equipment for use in filmmaking and can lease equipment to filmmakers.\(^8\)

**Copyright Protection and Piracy**

Practitioners estimate that some 25% of revenues from film and audiovisual creative works are lost to piracy in the country. There is a mix of legislative laws covering copyright in Mauritius. The Copyright Act of Mauritius was revised in 2014 to provide better protection to copyright and related rights.\(^9\) The basis for protection is not only citizenship of or habitual residence in Mauritius but also concerns works covered by any international convention or other international agreement to which Mauritius is a party.\(^10\) The country’s Criminal Investigation Department has its own copyright protection team.

The Mauritius Society of Authors (MSA) was established under the Copyright Amendment Act of 2017 to replace the Rights Management Society of Mauritius.\(^11\) It is housed under the Ministry of Arts and Cultural Heritage.\(^12\)
MSA collects fees and distributes the money as royalties to its members as well as foreign authors, composers and publishers through international affiliated Collective Copyright Management Societies worldwide.

**PRODUCTION**

Practitioners estimate that the film and audiovisual sector generates about US$20 million gross revenue annually and has created some 5,000 direct and 20,000 indirect jobs. Prior to the advent of Covid-19, an average of 2 local and 20 foreign films were produced each year. Of these, at least 50% originated out of India and Bollywood, followed by films from Germany, the UK, France, the USA and South Africa. Numerous international commercials were also produced in Mauritius.

**FILM**

Filmmaking in Mauritius started with sporadic attempts at making home movies in the 1950s. Later on, the popularity of the Bollywood movie *Kuch Kuch Hota Hai* (1998), filmed in Mauritius, prompted other Indian producers to take advantage of the country’s scenery. Thanks to its attractive natural environment and diverse landscapes comprising towns with tree-lined avenues such as Port Louis, forests, national parks, mountains, and beaches, Mauritius has been a popular film destination for over 30 years. Since 1977, more than 200 foreign films, commercials and TV series have been shot in the country.

Some of the earlier international films include *Jane and the Lost City* (1987) and *Tropical Heat* (1993). In 2013, *Les Enfants de Troumaron*, adapted from the book of Ananda Devis, wife and mother of Harrikrisna Anenden and Sharvan Anenden, directors of the film, was nominated for the Academy Awards. The film *Break Up Guru* (2014), shot entirely in Mauritius, was seen by an audience of over 40 million in China and as a result, Chinese tourism increased by over 500%, according to the MFDC. Other notable productions include *Dilwale* (2015); the Hollywood film *Serenity* (2019), starring Anne Hathaway and Matthew McConaughey, the first foreign film to be shot entirely in Mauritius; *Agent*, the Drama series (13 x 48 mins) produced by Jeremy Nathan for Cinebar Studios for Canal + International, SABC 1 and acquired by Netflix, *Amor de Madre* (A Mother’s Love) for Netflix Spain (2020), and *Escape to Love* (2020), the first Mauritian Netflix Original USA project.

Andreas Habermeyer, who worked on *Serenity* (2019) and an Executive Producer on the series *Agent* (2019), Co Producer on the *Amor de Madre and Escape to Love,* and Wassim Sookia who produced *Eros* (2005) and *Home, Away* (2011), which was selected for the 34th Festival International du Court Métrage de Clermont-Ferrand, are among the most prominent Mauritius-based producers.

Finally, a few Mauritian players, such as Gustave Kerven, known for *Delete History* (2020), partially filmed in Mauritius in 2019, *Louise-Michel* (2008) and *Aaltra* (2004), and Gaston Valayden, seen in *Les Enfants de Troumaron* (2012), *The Comeback: A Tale of Irrelevance* (2019) and *La Cathédrale* (2006), have also shone on the international stage.

Although the Mauritius film sector is mostly centered around servicing foreign productions, a few local filmmakers inspired by Hollywood, Bollywood, and Nollywood have started creating their own content, which is sometimes referred to as “Mauriwood.”

Among filmmakers, David Constantin is probably the most prominent Mauritian-based film director today. In 2002 he directed and produced the short film *Diego l’interdite* (Diego the Forbidden, 2002) and directed *Lonbraz Kann* (*Sugarcane Shadows*), in 2014. He is busy with his second feature film, called *O Ancoradouro Do Temp* (*The Anchorage of Time*).

**TELEVISION AND VIDEO**

Besides working as crew on international productions shooting in the country, budding local filmmakers can practice their craft by producing commercial, corporate, music or wedding videos, or by distributing their own creative work online. Local content creators are also sometimes able to sell their work to local TV stations, which are required to air 10% local content. However, most times the MBC requires the filmmakers to pay them, rather than the other way around.
CINEMA EXHIBITION

There are 14 cinemas and 36 screens in Mauritius. Movies are predominantly broadcast in French, with some in English or Indian languages. The Star Cinema within the Bagatelle Mall of Mauritius contains six screens, with a total seating capacity of 1,200. Other movie theaters include the Cine Klassic Movie Theater and Cinema Star at the Caudon Waterfront, and Cinema ABC in Rose Hill. With cinemas being closed in 2020 due to the Covid-19 pandemic, large sections of the audience shifted online to streaming platforms such as Netflix.

BROADCAST

In Mauritius, TV sets have had a strong foothold among homes for years, with a penetration standing above 95% for more than 15 years. Almost the entirety of households actively subscribe to a pay TV service, distributed through direct-to-home satellite (DTH) or IPTV. Canal+ is competing with the incumbent actor Mauritius Telecom, majority-owned by Orange, and with the Indian Ocean based Parabole. DStv is also popular in the country.

The Mauritius Broadcasting Corporation (MBC) is the national public broadcaster. MBC programmes are broadcast in 12 languages, notably French, Creole, English, Hindi, Urdu, Bhojpuri, Tamil, Gujarati, Telugu, Marathi, Mandarin/Cantonese and Hakka, across 17 television channels in Mauritius, 4 in Rodrigues and 2 in Agaléga. It was the first public television broadcaster in Africa to launch Digital Terrestrial Television channels. In 2007, MBC extended its digitised service to the islands of Rodrigues and Agaléga. Meanwhile, private TV stations include ION News, Teleplus, TopTV Mauritius, L'Express (Mauritius) and MBC Web TV.

DIGITAL PLATFORMS

Mauritius counted 1.91 million mobile connections in 2020, which represents 150% of the total population. There were 860,000 thousand internet users in Mauritius as of January 2020, corresponding to a 68% internet penetration. There were 860,000 social media users in January 2020.

The Mauritian VOD and OTT market remains small in volume and value, however some practitioners estimate that up to 500,000 people may be subscribers or regular consumers of online video services. Global or panafrican players such as Netflix, Showmax (MultiChoice), iROKO+, Amazon Prime Video and Apple TV+ are available in the country. In December 2016, the MBC also released the MBC play app, allowing users around the globe to stream the Live TV & radio channels of the corporation.

FUNDING SOURCES AND MECHANISMS

PUBLIC FUNDING

In 2013, a 30% Film Rebate Scheme was established to provide both local and international filmmakers with a financial incentive to shoot in the country. The terms of the rebate were extended in 2016 to offer a competitive cash rebate of a maximum of 40% on Qualifying Production Expenditure (QPE) incurred in Mauritius. The Economic Development Board (EDB) is entrusted to facilitate film production under the Film Rebate Scheme.

The QPEs include transport, accommodation, manpower, catering and the hiring of equipment and premises in Mauritius. In order to qualify, filmmakers must spend over US$30,000 for commercials, documentaries, and various television type shows. For feature films, they must spend over US$100,000 to qualify for 30% Rebate. If they spend over US$1 million, they can qualify for up to 40% Rebate.

PRIVATE FUNDING

Several banks in Mauritius provide cash flow of the EDB Rebate, including Afrasia. There is no formal system of private equity investment into films yet, although many financial institutions and equity funds are showing interest in the industry, as it becomes more effective and widespread. Although, the drama series Agent, Jon Rabaud’s Blue Penny and David Constantin’s new film O Ancoradouro Do Temp (The Anchorage of Time), all secured private equity in Mauritius.

PROMOTION

In 2007, the Île Courts–International Short Film Festival was established by the non-profit organisation Porteurs d’Images. Since its creation, Île Courts–International Short Film Festival has acted as a toolkit for the development of cinema in Mauritius. The non-competitive festival is meant to be a showcase for a different cinema in Mauritius, with a focus on short films from the Indian Ocean area. French-speaking and creole-speaking filmmakers from the Caribbean and Pacific Islands also submit films for nomination and recognition.
In October 2017, the Government initiated a Mauritius Cinema Week to create an annual film festival to honour global talent and achievements from the global film industry. A second edition of the event was held in 2018.\(^{36}\)

There also exists many short film competitions - managed by the MFDC - such as the Bhojpuri short film competition, "I am better" short film competition, Inter-college film competition, Mauritius heritage short film competition, Road safety short film competition and the 7 Day Challenge,\(^{19}\) which play an important role in the development and promotion of young Mauritian film talents.

**EDUCATION AND TRAINING**

The University of Technology Mauritius (UTM) in collaboration with MFDC offers a series of short courses under the National Skills Development Programme (NSDP) in Camera & Lighting, Sound for Cinematography, and Film Editing.\(^{30}\) Courses last one month and are followed by a one-month film placement at MFDC.

Several universities, such as the Greenwich University Pakistan Mauritius Branch Campus and the University of Mauritius (Mediacom Studio), also offer several courses in media, from communication to journalism.

In 2019, filmmaker Andreas Habermeyer and Identical Pictures opened the International Film School Mauritius (IFSM) to offer professional-level education and technical training across all the key departments of multimedia screen work, with the goal of building up a powerful skills base and a vibrant screen storytelling culture in the Indian Ocean.\(^{41}\) This was interrupted by the start of Covid-19, and will re-open in 2021.

IFSM uses state-of-the-art studios, networks, post-production facilities, and film equipment facilities to offer Beginner Level, Advanced Level, Combined and Masterclass Short Workshop Courses in a variety of fields of study including film, camera work, lighting, screenwriting, film production, animation, sound engineering and cinematography. The courses are two to four weeks in length. The IFSM will be formally launched in 2021, as soon as Covid-19 allows.

**NOTES**

1. MFDC. Mauritius Film Development Corporation. http://www.mauritiusfilm.mu/
2. EDB. About Us. https://www.edbmauritius.org/aboutus
5. IBA. Welcome to the IBA Web Site. https://www.iba.mv/
10. Copyright Index. Get Copyright Registration in Mauritius. https://copyrightindex.com/getcopyrightregistrationmauritius
37. Filmfreeway. Ille Courts International Short Film Festival. https://filmfreeway.com/IleCourtsInternationalShortFilmFestival
41. International Film School Mauritou. www.filmschool.mv/
Created in 1944, the Moroccan Centre for Cinematography (Centre Cinématographique Marocain, CCM) is a public administrative institution responsible for working for the promotion, distribution and screening of Moroccan cinema. One of its missions is also to make Morocco a pole of attraction for foreign production. The Commission for the support of national production, responsible for determining which projects receive support from the aid fund, is made up of personalities from the world of art and culture.

Professionals in the sector are represented by numerous organisations such as the Union of Moroccan Film Directors and Authors (Union des Réalisateurs Auteurs Marocains), the Moroccan Chamber of Documentary Filmmakers (Chambre Marocaine des Documentaristes), the Moroccan Chamber of Film Producers (Chambre Marocaine des Producteurs de Films), the Moroccan Chamber of Cinemas (Chambre Marocaine des Salles de Cinéma), the Moroccan Chamber of Distributors of Films and Audiovisual Programmes (Chambre Marocaine des Distributeurs de Films et Programmes Audiovisuels), the Moroccan Chamber of Film Technicians (Chambre Marocaine des Techniciens de Films), the Moroccan Chamber of Audio and Audiovisual Producers (Chambre Marocaine des Producteurs de l’Audio et de l’Audiovisuel), the National Federation of Film Clubs of Morocco (Fédération Nationale des Cinéclubs au Maroc), the Moroccan Association of Film Critics (Association Marocaine des Critiques de Cinéma) and the Moroccan Federation of the Audiovisual and Film Industries (Fédération Marocaine des Industries de l’Audiovisuel et du Cinéma).

The regulatory body of the audiovisual sector is the High Authority for Audiovisual Communication (Haute Autorité de la Communication Audiovisuelle, HACA), which is composed of the Higher Council of Audiovisual Communication (Conseil Supérieur de la Communication Audiovisuelle) and the General Directorate of Audiovisual Communication (Direction Générale de la Communication Audiovisuelle). The Higher Council ensures that audiovisual communication companies in the public and private sectors comply with the provisions of the legislation and regulations concerning audiovisual communication, as well as with the specifications thereof.

**FILM AND AUDIOVISUAL POLICY**

Morocco is positioned as one of the African countries with the greatest presence in film production, with a commitment from the public authorities and a declared will to use the vast potential of film to best advantage for the development of the country and its sociocultural characteristics. The strategic objective is to make Morocco a regional and international hub through a policy of partnerships, reinforcing the support system for Moroccan films, and attracting foreign investment.

Moroccan film production has been constantly growing since 1988, thanks in particular to the setting up of the Moroccan Centre for Cinematography (CCM) by the national production support fund. The 2013 budget act marked a decisive turning point by enabling the implementation of the new film production aid procedure. This aims to prioritize the quality of production, the expansion of the film industry in Ouarzazate, the improvement of existing cinemas and their transformation into multi-auditorium and multiplex establishments. It also enables the provision of support to cinema owners and managers to help finance their equipment with digital projectors. The drafting of a white paper on production has made it possible to put in place mechanisms for the protection of intellectual property and to combat counterfeiting and piracy.

Moreover, the quality of the filming sites, particularly in the southern region, is attracting an increasingly large number of foreign productions. The construction of an international film village in Ouarzazate demonstrates the public authorities’ will to promote the image of the Kingdom as a destination for filming and projection. More recently, the supply of film studios has been reinforced by a centre in Rabat-Salé-Kénitra.

Foreigners and non-Moroccan production companies are exempted from VAT on all goods and services purchased in Morocco.

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**INSTITUTIONAL FRAMEWORK**

**MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS**

The Moroccan film sector is organised under the supervision of the Ministry of Culture, Youth and Sports, which is responsible for “the promotion of the national film industry in accordance with an approach which considers cinema not only as a sector reflecting values, and producing culture and images, but also as a sector creating wealth and employment”.

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**MOROCCO**

<table>
<thead>
<tr>
<th>Population: 40.9 million</th>
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<tr>
<td>GDP per capita: US$ 7,515</td>
</tr>
<tr>
<td>Median age: 29.5 years</td>
</tr>
<tr>
<td>Urban population: 63%</td>
</tr>
<tr>
<td>Rural population with access to electricity: 100%</td>
</tr>
<tr>
<td>Mobile phone subscription: 124.2%</td>
</tr>
<tr>
<td>Internet users: 64.8%</td>
</tr>
<tr>
<td>Female upper secondary education completion rate: 17%</td>
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This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.
A new decree on public aid for the production of foreign films, which came into force in 2018, has also placed a budget of US$11.4 million at the sector’s disposal in order to attract foreign productions and revitalize Moroccan film production. Morocco undertakes to reimburse 20% of the expenditure of eligible foreign productions (films, series, TV films and documentaries filmed in Morocco for at least 18 days), with a maximum of US$2 million per production. A series of other benefits are provided for foreign productions, such as the procedure for the temporary import of arms and munitions necessary for film shoots, discounts granted by the Moroccan Royal Air Maroc airline, a nominal fee for filming at historical sites and monuments, simplification of the customs clearance procedure for both the import and export of film equipment, as well as a system for facilitating administrative procedures and contacts with the authorities in the country’s administrative divisions where filming takes place.

Lastly, a new bill approved by the House of Councillors/Cabinet of Morocco on 31 January 2021 has reorganized the CCM with new functions to play a key role in the regulation, supervision and consolidation of the sector. This bill replaces a 40-year old law, which has shown its limitations in providing a framework for the new challenges undertaken by Morocco. The Centre hopes that this new law will provide it with mechanisms making it possible to move the film economy forward, create employment opportunities, encourage creativity and promote and enrich Moroccan cultural identity.

Lastly, with regard to the audiovisual sector, a Fund for Promotion of the National Audiovisual Scene (Fonds pour la promotion du paysage audiovisuel national) was adopted within the framework of the 2005 Budget Act. It has made it possible to provide more resources to public channels in order to ensure balance between the requirements of their public service mission and the demand of a wider audience, including the provision of nationwide coverage in particular. The fund has made it possible to finance, among other things, the replacement of production equipment, the improvement of the quality of national broadcasts and the production of audiovisual works, particularly television films.

COPYRIGHT PROTECTION AND PIRACY

Piracy is one of the major issues in the crisis of film distribution in Morocco. According to the Foreign Exchange Office (Office des Changes), 50 million blank DVDs enter the country legally each year. Films are then burned and sold on the black market for between US$0.57 and US$0.79. It is estimated that the perpetrators of piracy make a total of US$28 million. In general, films are pirated directly in cinemas at the time of their release, and copyright infringers therefore manage to circulate copies as soon as films are released. In order to stay one step ahead of piracy, the Moroccan Megarama cinema chain is trying to obtain distribution rights for films at the same time as their release in Europe or the United States.

The Moroccan Copyright Office (Bureau des Droits d’Auteur Marocain) is the collective management body responsible for collecting and distributing all forms of royalties in Morocco. But although Morocco has a relatively strong legal framework with regard to intellectual property, industry professionals report challenges in terms of awareness-raising and enforcement on the ground.

The first Moroccan law on the protection of literary and artistic works of 1916 has been amended on numerous occasions in order to improve the national system for the protection of copyright and related rights, and adapt it to the new international environment.
In particular, the institution of payment for private copying makes it possible to provide financial compensation for prejudice suffered by holders of copyright and related rights.

**PRODUCTION**

According to the CCM annual report, Moroccan national production totalled 13 feature films, 83 short films, 36 series, 28 TV films, 86 commercials and 16 docudramas in 2020. In addition, 8 foreign feature films and 9 foreign TV series were filmed in the Kingdom, representing a total investment of US$21.5 million. This constitutes a sharp fall compared to 2019, when the overall budget invested in Morocco by foreign productions reached almost US$90 million. The number of cinema admissions also fell significantly in 2020, with box office receipts decreasing from US$10.5 million in 2019 to US$2.7 million in 2020.

In 2012, the Association of Audiovisual Sector Companies (Association des Entreprises du Secteur Audiovisuel, ASES) estimated that there exist between 108 and 250 production companies in Morocco, of which 20 to 30 have a genuinely structured organisation.

**FILM**

The history of cinema in Morocco is connected with that of France, due to their geographical proximity and common past. After the Lumière brothers’ grand premiere in Paris at the end of the 19th century, operators went in search of interesting and exotic images, particularly in Morocco. The first cinema opened in Fez at the beginning of the 20th century. The history of cinema in Morocco includes Daniel Quintin was the first film to be shot in Morocco. Since then, the country provides, the diversity of its natural landscapes and its technical infrastructures. In April 2015, the British daily newspaper The Guardian listed Morocco as one of the world’s 10 best film locations.

Major directors and actors having filmed in Morocco include John Huston, Martin Scorsese, Ridley and Tony Scott, Philippe de Broca, Jackie Chan, Alan Chabat, Paul Greengrass, Oliver Stone, Alejandro Gonzalez Inárritu, Mike Newell, Clint Eastwood, Bernardo Bertolucci, Vittorio Storaro, Franco Zeffirelli, Bruce Willis, Sean Connery, Brad Pitt, Robert Redford, Nicole Kidman, Tom Hanks, Daniel Craig, Sam Mendes, Sophia Loren, Monica Bellucci, Billie August and Leonardo DiCaprio. Films such as Kundun (1997) and The Last Temptation of Christ (1988) by Martin Scorsese, American Sniper (2014) by Clint Eastwood, Gladiator (2000) and Black Hawk Down (2001) by Ridley Scott, Mission Cleopatra (2002) by Alain Chabat, the 5th instalment of Mission Impossible and the 24th James Bond film, are among the highly successful films shot in Morocco.

As far as production and the local market are concerned, the Moroccan Centre for Cinematography (CCM) and Souissi Studios were created in 1944, a period when the number of cinemas in urban centres was beginning to increase. Moroccan audiences were initially particularly fond of Egyptian films, for both cultural and political reasons. Once national sovereignty was re-established in 1956, the government used the CCM to encourage a large number of short film productions, in particular by young filmmakers having graduated from the prestigious IDHEC film school. Le Fils Maudit (1958) by Mohammed Ousfouri and Wèchmo (1970) by Hamid Bennaniest are considered the first feature films directed by Moroccans.

In the 1980s, the government began to actively support national film production, leading to a sharp increase in the number of films made. L’Amour à Casablanca (1991) by Abdelkader Lagta and À la recherche du mari de ma femme (1993) by Mohamed Abderrahman Tazi are classics of the early 1990s. Young filmmakers from the Moroccan diaspora such as Ismaël Ferroukhi, Nour-Eddine Lakhmari, Nabil Ayouch and Hassan Lagzouli were beginning to emerge.

Public enthusiasm, political measures and administrative incentives, such as an annual budget of US$6.8 million intended for advances on receipts, aid for scriptwriting, and the creation of the Marrakech International Film Festival (Festival international du film de Marrakech), finally established Moroccan cinema. Today, the country produces an average of 25 feature films a year, and Moroccan films take leading box office positions. In 2019, the comedy Messaoud, Saida et Saadane by Brahim Chkiri dethroned the Hollywood blockbuster Joker, attracting more than 200,000 cinema-goers.

Moroccan filmmakers such as Hicham Lasri, Nourredine Lakhmari, Laila Marrakchi, Narjiss Nejjar, Faouzi Bensaidi, Nabil Ayouch, Jilali Ferhati, Ismaïl El Iraki and Halima Ouardiri are internationally recognized and regularly selected for the most prestigious film festivals such as those of Berlin, Cannes and Venice, often returning with awards. Among the most recent awards, Zanka Contact by Ismaïl El Iraki received the Best Actress award at the 2020 Venice Film Festival, Halima Ouardini won the Best Short Film award at the 2019 Berlinale, and Meryem Benn’Barek-Aloïsi won the Un Certain Regard Award for Best Screenplay at the 2019 Cannes Film Festival for Sofia, a film about single mothers. In 2021, the young director Sofia Alaoui won a César and a Sundance award for her short film So What If the Goats Die (Qu’importe si les bêtes meurent), filmed in Berber.

Women have a strong presence in Moroccan cinema. Farida Belyazid made socially committed popular films in the 1970s and 1980s, and Farida Bourquia was responsible for the first Moroccan documentaries about women made by women in 1975. Today, female directors such as Narjiss Nejjar, Sonia Terrab, Sofia Alaoui, Jihane Bahar, Asmae El Moudir, Meryem Benn’ Barek, Maryam Touzani, Laila Marrakchi, Dalila Ennadir and Simone Bitton tell the stories of the daily lives of women in Morocco in their films.
Finally, animated cinema is also booming in Morocco, thanks in particular to the galvanizing effect of the International Animated Film Festival in Meknes (Festival International de Cinéma d’Animation de Meknès, FICAM)\textsuperscript{15}. For 20 years, the FICAM has set a benchmark for animated film, attracting the greatest directors from all over the world (Paul Driessen, Michel Ocelot, Hélène Vayssières, etc.). The films are handpicked with a rigorous selection process and the festival provides an opportunity for explaining animated films and bringing them to a wider audience in a country where they are little-known. Moreover, for the first time, the famous festival of the animated film genre, which is held in Annecy (Annecy Festival, Festival international du film d’animation d’Annecy), has given carte blanche to Meknes at its last edition, in order to highlight the Moroccan animated film scene.

**TELEVISION AND VIDEO**

The Moroccan public audiovisual sector is composed of two public broadcasters, SOREAD 2M and the National Broadcasting and Television Company (Société nationale de radiodiffusion et de télévision, SNRT), as well as about ten private channels. The public channels are financed by state subsidy through a licence fee, but also thanks to surplus revenue from advertising services, and income from the provision of certain services. Numerous productions are made in-house, but since the liberalisation of the Moroccan audiovisual scene in 2005, broadcasting requirements impose a broadcasting quota of 30% productions of external origin. This measure made it possible to open an important market for new independent production companies.

According to a study conducted by the Association des entreprises du secteur audiovisuel (Association of Audiovisual Sector Companies, ASESA) in 2005\textsuperscript{16}, the public sector was the largest employer in the sector, with a workforce of 2,200 people employed at the SNRT and 700 at SOREAD 2M. In the private sector, the number of employees varies, with a total payroll estimated, at the time, at between 450 and 600 people.

The SNRT and SOREAD 2M are the principal purchasers and broadcasters of Moroccan films and documentaries, but the demand for local television content is not regular. The month of Ramadan, during which families end their daily fast by sharing meals in front of the television, concentrates a large proportion of the channels’ investment in local content. In 2020, US$25.5 million were invested in 63 works during the Ramadan period, an amount which represented almost half of total Moroccan production that year.\textsuperscript{10}

Series are a part of Moroccans’ daily life\textsuperscript{17}. While audience ratings were initially snatched up by Mexican and South American telenovelas in the 90s and 2000s, Turkish series have taken over in the course of the last ten years, with ratings approaching four million viewers for the national channel 2M. Egyptian series have always been an abiding feature, but Moroccan series are gaining ground, above all during Ramadan. Moroccans are loyal to their national productions and their national stars. *Rdat Al Walida* (Mother’s Blessing) is one of the most watched series on the Al Aoula channel, the first public general interest TV channel, with 2.7 million viewers\textsuperscript{18}. On YouTube, it outperforms all of the national productions, and its trailer even exceeds one million views. Other series are also very popular, such as *Moummou Aynia* and *Yakout wa Anbar*, which has become a real social phenomenon, suddenly making the young actors Rabii Skalli and Fatima Zahra Akaaboune into stars.
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CINEMA EXHIBITION

Morocco has 77 cinema screens.2 According to the CCM, the operation of cinemas in Morocco is going through a deep crisis, due to the closure of about ten cinemas every year, and the fall in attendance levels for traditional cinemas that are still working. Indeed, a large number of small cinemas are closing or dying, and a large city like Agadir now no longer has any cinemas. To remedy this situation, the CCM recommends the transition from the current single-screen mode of operation, with single auditoriums, to a multi-auditorium mode of operation.

To this end, several measures have been put in place via the promulgation of the law on the application of VAT to the cinema sector, enabling investors in multiplexes to recover the VAT with investment agreements. The CCM is also examining measures with the Ministry of Finance to support cinema exhibition and the drafting of agreements with local authorities to encourage cinemas. For example, the State is supporting the construction of a new multiplex with 7 screens and 1,200 seats in Casablanca, as well as 5 plans for new multiplexes (2 in Rabat and the other 3 in Fez, Tangier and Agadir).

A certain category of local films, particularly popular comedies, are released in cinemas and attract large numbers of admissions of cinema-goers. But as elsewhere, original films d’auteur have difficulty in finding distributors.

BROADCAST

In Morocco, the television market is very large, and 90% of households have owned a television set for more than ten years. Free-to-air satellite services (FTA) dominate the market to a very large extent, reaching about 94% of TV households in 2019.

The Moroccan audiovisual sector reached a major turning point in 2000, thanks in particular to the creation of the HACA and the ending of the State monopoly on radio and television. This reform also led to the promulgation of the law on audiovisual communication, the launch of new special interest and regional channels, the signature of statements of requirements and programme contracts for public channels, and lastly the granting of licences to new private telecommunications companies.

Today, the supply of audiovisual services comprises about ten channels. The public network SNRT distributes five national channels (TVM, Arriyadiya, Arrabi, Al Maghribiya and the Mohammed VI Holy Koran station (Radio Mohammed VI du Saint Coran)) as well as the regional station of Laayoune, and the general interest Amazigh channel. SOREAD-2M, another public channel, is by far the most-viewed channel in Morocco, with an audience share of 61.6%.19 Medi 1 TV, Canal Atlas, and Télé Maroc are private channels.

Pay television services are struggling to emerge in a market marked by the rise of piracy. The local incumbent telecommunications company Maroc Telecom holds the bulk of the market, challenged by Pan-Arab actors operating direct-to-home (DTH) satellite services in all Middle Eastern and North African countries20. beIN SPORTS is the most popular multichannel pay television package in Morocco, representing about 65% of the local pay television market.

DIGITAL PLATFORMS

The telephone network and the Internet are particularly well-developed in Morocco, with internet subscriptions reaching 64.8% of the population, while the number of mobile subscribers was 44.7 million in 2019, or 124.2% of the population (certain people having multiple subscriptions)21. VOD streaming platforms (Netflix, Showmax and CanalPlay) are available in the country and are very popular, and are gradually replacing pirated DVDs. Morocco is also one of the three largest markets for the Star Play service, which has 1.8 million subscribers in the Arab area22. But there are no local VOD platforms to date.

FUNDING SOURCES AND MECHANISMS

Since 1980, Morocco has put incentives in place to promote national film production. Over a period of seven years, and after 35 feature films and 30 short films, the initial system of automatic and non-selective support showed its limitations2, prompting the CCM to introduce support for national production based upon the taxation of cinema tickets in 1987. Between 1987 and 1999, 58 feature films and 38 short films were then produced.

Advances on receipts were only introduced in 2003, in accordance with a new system that grants four instalments of funding, distributed at different levels of the development of a film. Firstly, advances on receipts for feature films and short films before and after production, presented by Moroccan production companies. Secondly, a financial contribution for the writing and rewriting of feature and short film screenplays. Finally, a quality bonus for feature and short films having received an advance on receipts before production. However, some industry professionals complain of a lack of strategy in the selection of the projects supported, and note the limits of a system based upon an advance on receipts, when the country has too few cinemas.

In terms of international subsidies, Moroccan producers have access to numerous grants, notably from the Doha Film Institute. Certain NGOs and private funds, such as the Touria and Abderrahmane Tazi Foundation (Fondation Touria et Abderrahmane Tazi) and the OCP Foundation (Fondation OCP), as well as the Institut Français also sometimes finance certain projects, including documentaries.

Finally, private investors exist in the sector but are rare, and few banks finance cinema.
There are numerous film festivals in Morocco. The Marrakech International Film Festival is a major event on the Moroccan artistic scene, and an opportunity for Moroccan filmmakers to appear at the forefront alongside international stars such as Martin Scorsese, Robert de Niro and Robert Redford. In addition to film screenings, the festival also provides masterclasses and the Atlas Workshops, a talent development programme supporting projects at the writing, pre- and post-production stages. Today, the Marrakech festival has become a true international showcase for the country.

Other well-known industry events include the Tangier National Film Festival, which rewards the best national productions of the year, the Agadir FIDADOC festival, which celebrates documentary film, the Salé International Women’s Film Festival (Festival International du Film de Femmes de Salé), the Tétouan Film Festival which showcases Mediterranean cinema, and the above-mentioned Meknes International Animated Film Festival.

Lastly, Morocco takes part in a large number of international festivals, such as the Cannes, Toronto and Berlin Festivals, and in audiovisual trade shows such as MIPCOM, in order to promote the country as a film location.

**PUBLIC INSTITUTIONS**

Morocco has a number of public Higher Educational Institutes providing degree programmes, such as the Higher Institute for the Information et Communication Industries (Institut Supérieur de l’Information et de la Communication, ISIC), the Higher Institute of Dramatic Arts and the Cultural Studies (Institut Supérieur d’Art Dramatique et d’Animation Culturelle, ISADAC) and the Higher Institute of Vocational Training for the Audiovisual and Film Industries (Institut Supérieur des Métiers de l’Audiovisuel et du Cinéma, ISMAC) in Rabat and the Higher School of Technology in Oujda (Ecole Supérieure de Technologie d’Oujda, ESTO).

A number of specialized university courses are also available at Cadi Ayyad University (Université Cadi Ayyad) in Marrakech, Abdelmalek Essaâdi University (Université Abdelmalek Essaïdi) in Tétouan, King Fahd School of Translation / UAE (Ecole Supérieure Roi Fahd de Traduction / UAE) in Tangier, University of Hassan II Casablanca (Université Hassan II de Casablanca), the Faculty of Letters and Humanidades Ben M’Sit (FSLSH de Ben M’sik), the University of Chouaib Doukkali in El Jadida (Université Chouaib Doukkali), Ibn Zohr University (Université Ibn Zohr) in Agadir, Sidi Mohammed Ben Abdellah University (Université Sidi Mohamed Ben Abdellah) in Fez, Sultan Moulay Slimane University Beni-Mellal (Université Sultan Moulay Slimane) and the Moulay Ismail Faculty (Faculté Moulay Ismail) in Meknes.

**PRIVATE INSTITUTIONS**

Lastly, in the private sector, a number of vocational training institutes provide high quality training courses, such as the Film Industry Vocational School (École des Métiers du Cinéma, EMCC), COM’SUP, the Higher Institute of Journalism and Communication (Institut Supérieur de Journalisme et de Communication, ISJC), and the Higher School of Journalism and Communication (École Supérieure de Journalisme et de Communication, ESJC), the Institute of Journalism and Vocational Training for the Television Industry (Institut de Journalisme et des Métiers de la Télévision, IJMT), all of which are in Casablanca, the Institute for Leadership and Communication Studies (ILCS) and the Specialist Institute for the Film and Audiovisual Industries (Institut Spécialisé du Cinéma et de l’Audiovisuel, ISCA) in Rabat, the Specialist Vocational Training Institute for the Film Industry (Institut Spécialisé dans les Métiers du Cinéma, ISMC) in Ouarzazate, the School of Visual Arts (École Supérieure des Arts Visuels, ESAV) in Marrakech, the ENSAM-Meknes Design and Technology Engineering School (École Nationale Supérieure d’Arts et Métiers, ENSAM) in Meknes and SUP’MM in Tangier.

**NOTES**

2. Centre cinématographique marocain – www.ccm.ma
3. www.haca.ma
5. El Express Canada, December 2019 Ouarzazate, capitale africaine du cinéma
15. https://ficam.ma
19. Media Marketing, March 20, 2018 https://mediamarketing.ma/article/HZ7FI7G/2m_est_toujours_la_chaine_la_plus REGARDee_au_maroc.html
21. UNDP Global Development Indicators
MOZAMBIQUE

Population: **41.2 million**
GDP per capita: **US$ 1,280**
Median age: **17.6 years**
Urban population: **36.5%**
Rural population with access to electricity: **8%**
Mobile phone subscription: **47.7%**
Internet users: **10%**
Female upper secondary education completion rate: **5%**


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

After having being managed by a National Institute following independence, the film industry in Mozambique has been under the authority of the Ministry of Tourism and Culture and under the supervision of the National Institute of Cultural and Creative Industries (INICC-IP). The INICC-IP was created in 2019, with the mission of implementing, executing and stimulating the policies adopted by the government for the cultural and creative industries, and is the regulatory authority for the film and audiovisual sector.

Television activity is managed by the Information Cabinet (GABINFO), an organisation attached to the Prime Minister’s Office.

The Association of Filmmakers of Mozambique (AMOCINE) is the association grouping together professionals in the sector.

FILM AND AUDIOVISUAL POLICY

The Law on the Film and Audiovisual Industry adopted in 2017 (Lei no. 1/2017) and the regulations thereof were subject to debate and strongly contested by the professional sector, which considers that the regulations adopted contain restrictive provisions that limit and hinder their economic activity, while failing to take technological change and the economics thereof into account.

The Law on the Press is currently in the course of review and provides for the adoption of the Television and Radio Law. The regional civil society organisation, the Media Institute for Southern Africa (MISA), is calling for these legal texts to adequately reflect technological reality, new platforms and international organisations’ recommendations and good practices in the social communication sector, as well as for the adoption of a code-building attitude, contributing to the integration of norms into a single text, thus avoiding the proliferation thereof.

The country’s Constitution provides for freedom of expression. A Commission of the Ministry of Culture is responsible for classifying films, in terms of age of access.

COPYRIGHT PROTECTION AND PIRACY

The vast majority of piracy of audiovisual content concerns foreign content (Hollywood, Bollywood and others) and therefore has no major impact on the authorities and industry professionals in Mozambique.

The Copyright Law adopted in 2001 constitutes the main legal instrument within Mozambique’s legal system. Supervision of the application of this law is exercised in a transverse manner, among others, by the Ministries of Commerce and Industry, Culture and Justice.

The Associação Moçambicana de Autores (SOMAS), created in 2000, is an association working for the recognition of authors and protection of copyright. It primarily works in the music industry.

PRODUCTION

FILM

The first film screenings in Mozambique were held at the beginning of the twentieth century. Cinema has strongly marked the country’s history, from colonisation to the liberation struggle, until independence in 1975. After independence, the government actively supported a policy aimed at promoting a national film industry. Thus, in 1977, the National Film Institute (INC) was created, the country’s first cultural institution.

This was followed by years of very dynamic expansion, with the necessary resources, aimed at training filmmakers and the beginning of regular national production. Training was provided through partnerships with governments (Cuba, Brazil and France) and foreign filmmakers (Ruy Guerra, Med Hondo, Haile Gerima, Jean-Luc Godard, Jean Rouch, etc.). The INC was given administrative and financial autonomy, enabling it to properly finance its film distribution activities, which in the meantime had been nationalised, through the network of about a hundred cinemas that existed at the time.
At the end of the 1980s, structural adjustment policies, aggravated by a civil war, imposed financial management measures on the government, which meant the end of public funding policies for the film industry. Despite the lack of public support, Mozambican cinema has developed over the years and a significant body of titles produced and directed by filmmakers continues to exist.

Among the first post-independence generation of filmmakers are Licínio Azevedo, Sol Carvalho, João Ribeiro, Isabel Noronha and Camilo de Sousa, all of whom have regularly made documentaries and feature films over the years such as Virgin Margarida (Virgem Margarida, 2012) and The Train of Salt and Sugar (O Comboio de Sal e Açúcar, 2016) by Licínio Azevedo, The Last Flight of The Flamingo (O Último voo do flamingo, 2010) and Avo Dezanove (2019) by João Ribeiro; Another Man's Garden (O Jardim de Outro homem, 2007) and Mabata Bata (2017) by Sol Carvalho; A Memory in Three Acts (2017) by Inadelso Cossa. These films often won awards in the festival circuit.

A new generation, including Mickey Fonseca, Pipas Forjaz, Inadelso Cossa, Yara Pereira and others, often trained on the job or taking advantage of various opportunities, are successfully taking over. Such is the case with the feature film Regate (2020) by Mickey Fonseca, for which Netflix has acquired the broadcasting rights. Other young talents are also emerging, often women such as Sara André, Lara Sousa, Gigliola Zacarra, Wilfred Machili and many others. The most active production companies are Ebano, Promarte, Kanema, Mahla Filmes, 16mm, YP Productions and Anima.

The country regularly receives international productions, taking advantage of its geographical proximity to South Africa and the infrastructures, technical teams and technologies available in the latter country. This is how Hollywood productions such as Ali (2001) by Michael Mann, The Interpreter (2005) by Sidney Pollack and Blood Diamond (2006) by Edward Zwick, amongst others, were shot in Mozambique via the intermediaries of South African service companies.

In a similar vein, a significant number of films originating from Portugal have also been shot in Mozambique such as The Murmuring Coast (A Costa dos murmúrios, 2004) by Margarida Cardoso, Sleepwalking Land (Terra Sonâmbula, 2007) by Teresa Prata; Tabu (2012) by Miguel Gomes and Mosquito (2020) by João Nuno Pinto.

Despite the irregularity of national production, it should be noted that Mozambican production has nevertheless attracted attention in international festivals in recent years, with films that have encountered success on their release in the few existing cinemas and on television.

TELEVISION AND VIDEO

Mozambique’s television channels do not have any policies and practices in support of film production. National television production is limited to the production of on-stream programmes. On rare occasions, technical services and facilities are provided in exchange for these programmes. The most common practice is the free broadcasting of programmes produced in an independent manner.

The small-scale video production market segment dedicated to coverage of weddings, christenings and other events is, despite its rudimentary expertise, by far the most active. This segment promotes the emergence of small production companies which, on the basis of very small technical production units, employ the great majority of people.

DISTRIBUTION, EXHIBITION AND BROADCAST

CINEMA EXHIBITION

In recent years, there has been a slight increase in cinema attendance and Mozambican film premiers have broken audience records. However, of the eight screens in the country in 2020, the company Lusomundo Moçambique had to close two in Maputo in 2021, as a result of the COVID-19 pandemic.

There are also a small number of screens associated with cultural centres and private operators in the cultural sector and associations, which screen films on an occasional basis, above all for events.

The network of informal projection venues with rudimentary technical conditions, often under licence and paying taxes to the State, is the most dynamic and a source of employment for numerous operators throughout the country. This is a segment to which innovative support policies could be applied, since it provides employment and plays a highly important social role in providing entertainment to disadvantaged communities.

BROADCAST

Television market penetration has gradually increased over the years, reaching about 35% of households in 2019. The transition to digital terrestrial television (DTT) is expected to be completed in 2021.

Mozambique has about 15 public and private channels. Television of Mozambique (Televisão de Moçambique, TVM) is a public channel and covers the whole territory. SOICO Televisão (STV) is a private channel launched in 2002, owned by the Soico Media Group, which publishes the daily newspaper O Pais and operates the SFM radio station. Since its creation, it has been broadcasting highly prestigious national and international events.

TV Miramar is the national audience leader in Mozambique and is part of the Miramar communication network, owned by the Brazilian Record Group (Record TV), one of the largest Portuguese language communication groups in the world. On a smaller scale, note should also be made of Televisão Internacional de Moçambique (TIM) and GUNGU TV, both of which are privately-owned.

In the pay television segment, MultiChoice (DStv and GOtv), StarTimes, TV cabo and Zuku share the market.
DIGITAL PLATFORMS

Mobile use reached 55% of the population in 2019. The market is shared between three operators: Mcel (Mocambique Celular), Movitel (Viettel Group) and Vodacom (whose majority shareholder is the Vodafone Group). 48% of mobile subscribers had access to the internet via their mobile in 2019, partly offsetting the low rate of market penetration of fixed broadband services. 

Net Kanema is a local platform providing exclusively local content and the bulk of national production. Netflix VOD services are available and represent a market which is still small but growing.

The South African platform Showmax is expected to be available in the course of 2021.

FUNDING SOURCES AND MECHANISMS

Various possibilities, limited in scope and volume of funding, are available to content producers in Mozambique. A support fund is provided for in the first Audiovisual and Film Industry Law adopted in 2017. The first call for projects was launched in December 2020, for support to the amount of US$10,000 per project.

The more experienced Mozambican producers, on the strength of their experience in international co-production, are familiar with international, above all European (Portugal, France, ACP-EU) support mechanisms, and are eligible for a large number of support systems. The majority of Mozambican films over the last twenty years have been produced thanks to these international support systems.

Moreover, funding provided by NGOs linked to development and education programmes in various fields is also available. The private sector’s contribution to local funding is minimal and primarily consists of providing various services and facilities.

PROMOTION

Mozambique has a few small-scale initiatives which perform promotional work. KUGOMA is a festival of short films which also provides short training courses, seminars and debates on various subjects.

INSTIDOC is organized on the basis of an international selection of institutional documentaries, primarily funded by various development organisations.

Africa Cinema Week, in partnership with the German University of Bayreuth, provides an annual selection of recently produced African feature films.

The European Cinema Week organised by the local Delegation of the EU is also an event in the local landscape on a regular basis.

Note should also be made of Museu do Cinema, a virtual museum project run by an association, which works to safeguard and disseminate Mozambique’s film memory.

Lastly, the Kulungwana association for Cultural Development awards an annual prize in the field of film and audiovisual, as well as visual arts, dance, photography, music and theatre. This prize, which is accompanied with a sum of money, is greatly appreciated by the country’s young talents.
The cultural centres of countries such as France, Brazil and Portugal also provide regular events organised around film screenings. The Mozambique-Germany Cultural Center (CCMA) and the local delegation of the European Union are also behind initiatives combining the production and distribution of short films by young directors.

EDUCATION AND TRAINING

The Higher Institute of Arts and Culture (ISArC) aims to develop the skills necessary for the creation, reflection, research, achievement, appreciation and management of different fields of art and culture and provides a programme with an interdisciplinary focus. Film training is a three-year course (Bachelor’s degree), but suffers greatly from an absence of human and material resources. The School of Communication and Arts - University Eduardo Mondlane (ECA- UEM) provides higher education in communication, information and arts, including journalism, music, theatre, library science and archives. In 2013, the institution announced plans, as yet not put into effect, in the fields of advertising, marketing, public relations, dance arts and audiovisual production.

The Higher Institute of Communication and Image of Mozambique (ISCIM) is a private institution that provides multimedia communication modules in its Communication and Corporate Relations course, while declaring the provision of training in the audiovisual field to be an objective.

UPCycles Residência Criativa 2021 is a creative residency open to filmmakers organised by the Museu do Cinema em Moçambique and financed by the Calouste Gulbenkian Foundation, which has been taking place in Maputo since 2019 and is open to nationals of African countries in which Portuguese is an official language. Numerous short training initiatives in various formats are also held every year, organised by associations such as the Filmmakers Association of Mozambique (AMOCINE) and the Association of the Friends of the Cinema Museum (AAMC), as well as by festivals and cultural centres, often in partnership with international trade associations.

In spite of these various options, the industry professionals and former students interviewed indicate that the available training does not place sufficient emphasis on practical aspects and know-how.

NOTES

2. https://www.facebook.com/Amocinemoz
8. https://revista.negocios.co.mz/o-sucesso-de-comboio-de-sale-acuicas/
13. https://miramar.co.mz
15. https://netkri.tifm.co.mz/catalog
17. https://www.facebook.com/instidoc/
25. https://gulbenkian.pt
NAMIBIA

Population: 3 million
GDP per capita: not available
Median age: 21.8 years
Urban population: 51%
Rural population with access to electricity: 35.5%
Mobile phone subscription: 112.7%
Internet users: 51%
Female upper secondary education completion rate: 13%


INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The main institution driving the development of the Namibian film sector is the Namibia Film Commission (NFC), a statutory body established in 2000 under the Ministry of Information and Communication Technology.

The NFC is composed of representatives from the film industry (nominated by the Filmmakers’ Association of Namibia), the Ministry of Tourism, the Ministry of Information and Technology, and the Ministry of Home Affairs.

The mandate of the NFC is to support the development of the local film industry through funding and training; help Namibian films get into festivals and travel globally, and position Namibia as a global film destination.

The Filmmakers Association of Namibia is the main representative organisation of professionals.

The Communications Regulatory Authority of Namibia regulates the broadcast sector.

FILM AND AUDIOVISUAL POLICY

Key policies supporting the local film and audiovisual sector in Namibia include funding through the NFC’s Film and Video Fund and a 50% local content quota for broadcast. The NFC has also held various discussions with the Namibia Investment Centre (NIC) in order to further incentivise the local film sector.

When it comes to Namibia’s status as a global film location, foreign crews seeking to shoot in Namibia are required to work with a local company and to secure film permits and work visas.

It is worth noting that Namibia has managed to position itself as an attractive film destination by leveraging its existing natural and human resources despite a lack of financial incentives for foreign films. Although it does not have any co-production agreements with other countries, the NFC is able to regularly collaborate with South Africa and Germany.

COPYRIGHT PROTECTION AND PIRACY

Namibian audiovisual practitioners estimate that less than 25% of creative content revenue is lost to piracy in the country, which is lower than in most other African countries. However, it is likely that this number is underestimated as Namibia only counts one collective management organisation, the Namibian Society of Composers and Authors of Music (NASCAM), which only represents one segment of the creative industries.

No organisation is in charge of collecting rights for audiovisual works. During the 2018/19 financial year, NASCAM reported the distribution of US$68,540 as royalty to members for the music played on private and public platforms.

Moreover, matters of Intellectual Property are subject to the Copyright Act of 1994, which is vastly outdated and does not account for the digital exploitation of creative works. In 2019, the Business and Intellectual Property Authority (BIPA) announced that the Copyright Act would be updated to take the evolutions of the industry into account and clarify the duties of customs and other enforcement officers.

PRODUCTION

FILM

Until very recently, Namibia was mostly known as a film location thanks to its stunningly desolate landscapes of dunes and desert, all easily accessible from world-class hotels and lodgings such as the Wolwedans Dunes Lodge and Little Kulula through well-maintained roads.

Iconic natural landmarks such as the Fish Canyon in the south, the floodplains of the Zambezi region in the north, the clay pans of Deadvlei and Sossusvlei, as well as arid landscapes, regularly attract commercials, music videos, adventure reality series (such as MTV’s The Challenge) and small sections of feature films.
Practitioners estimate that some 60 foreign projects are shot in Namibia every year, most of them originating from South Africa, Germany (22 productions in 2018), and the UK. The country has also served as backdrop to a long list of Hollywood productions, including *2001: A Space Odyssey* (1968), *10,000 B.C.* (2008), and *The Mummy* (2017), with the most high-profile of them probably being George Miller’s blockbuster *Mad Max: Fury Road*, which won six Oscars at the 2016 Academy Awards. For all these productions, the use of Namibian crew is a requirement unless there is a skills deficit in the country. This has allowed Namibian film technicians to gain valuable international experience. Prior to the pandemic, the country’s facilities were always fully booked, with the demand often surpassing the availability of skilled local crew.

When it comes to local films, *Namibia, the Struggle for Liberation* (shot in 2005 and released in 2007), a Namibian-American co-production starring Danny Glover, was the first feature film funded with Namibian money, with the government investing in the project. The film was not successful commercially but it did employ dozens of Namibian crews and created a structure upon which the industry has since then been able to expand. Pioneers of Namibian film such as Bridget Pickering, Richard Pakleppa and Cecil Moller have been joined by a younger generation, which includes Joel Haikali, Oshosheni Hivelua, Perivi Katjavivi, Tim Huebschle and Krischka Stoffels, and is committed to bringing Namibian stories to the screen. In the past few years, Namibian films such as *Katatura* (2015), *Land of the Brave* (2019), and *Invisibles* (2019), have started to make appearances and even win awards at festivals around the world. The industry reached a new milestone in 2020 when *Baxu and the Giants* (2019) became the first Namibian film to be acquired by Netflix.

Today ten local films are shot in Namibia every year on average. Practitioners estimate that about 20 production companies are active in the country, with between 50 and 100 people making a living exclusively from the audiovisual sector in Namibia. In total, practitioners estimate that the Namibian film and audiovisual industry supports about 2,500 indirect or part-time jobs. According to research conducted by the NFC, the sector generated US$1.3 million per year on average in direct and indirect contributions to the economy between 2012 and 2018.

**TELEVISION AND VIDEO**

As is generally the case in the industry in Africa and around the world, most Namibian film practitioners survive by diversifying their activities across the audiovisual spectrum, applying their creativity beyond film to commissioned projects for broadcast, corporate videos, and advertising.
Namibian TV channels are subject to a 50% local content quota, and the Namibian Broadcasting Corporation (NBC) has announced that it was determined to bring more Namibian creative content (outside of news and talk shows) on the air. In 2020 for example, the NBC released the local drama *Dreamers*, produced by Desert Film, as well as *The Search*, a reality TV program. Both productions received funding from the NFC.

**DISTRIBUTION, EXHIBITION AND BROADCAST**

**CINEMA EXHIBITION**

Namibia counts 16 cinema screens located in the big cities of Windhoek and Swakopmund, mostly showing Hollywood films. Namibian films gained access to theatrical distribution for the first time very recently, in 2019, thanks to the combined efforts of the NFC and key industry partners. Major Namibian films are now able to secure limited theatrical runs, although those are mostly attended by industry players, friends and family, and do not constitute a source of revenue for producers. Practitioners estimate the average market share of local films to be less than 10%.

Outside of the main urban areas, Namibian audiences currently have no access to cinemas. In 2019, the NFC announced its plan to collaborate with the Ministry of Information and Communication Technology to support the screening of local films nationwide by acquiring solar-powered cinema sets and donating them to rural communities.

**BROADCAST**

In Namibia, 51% of households owned a TV set in 2019. The pay TV audience (largely captured by frontrunner MultiChoice) has recently overtaken free-to-air (FTA) television, even though the transition to digital terrestrial television (DTT) FTA has been completed since 2015.

Public broadcaster NBC operates several free (NBC 1 and 2) and paid (NBC 3, 4 and 5) channels with varied programming including news, entertainment, dramas, telenovelas, movies, sports, music and educational content. One Africa Television is Namibia’s only private television station, and is available on the NBC’s DTT network and well on MultiChoice’s DStv and GoTv DTT platforms. After undergoing a restructuring process in 2016, the channel started to reintroduce locally produced shows in 2017 and is working to further increase its local production content. In 2019, One Africa TV partnered with First National Bank of Namibia to sponsor The 48-hour Film Project and screened the 11 short films that resulted from the competition.

**DIGITAL PLATFORMS**

The Namibian digital video and OTT market remains exceedingly small in volume and value, mostly due to the small size of the local market. Showmax (MultiChoice), iROKtv, Netflix, Trace Play (Trace TV), Amazon Prime Video and, recently, Apple TV+ are competing in the SVOD market.

Locally, the NFC has been developing its own streaming platform focused on Namibian content which is due to launch in 2021 in partnership with telcos. The streaming platform is known as Tala Streaming.

**FUNDING SOURCES AND MECHANISMS**

**PUBLIC FUNDING**

The Namibian Film Commission provides public funding to Namibia’s film and audiovisual sector through its Film and Video Fund. The NFC’s budget was US$241,766 in 2020, with 82% of the funding going towards the development of the film industry and the rest earmarked for operations, marketing and board expenses. Additional funding can be accessed through the National Arts Gallery of Namibia (NAGN), and the National Arts Council (NAC). In total, an estimated US$671,572 in public funding is available to Namibian filmmakers every year as a combination of grants and loans, with the largest amount given to one single project estimated at US$114,167.

When it comes to the NFC, its various support schemes target not only the funding of all formats of audiovisual production (short and feature films, documentaries, TV movies, dramas and soaps, animation) in both the development and production phases, but also skills training, audience development, promotion and marketing. In order to qualify for funding, projects must have been developed by or involve a significant role for Namibians, and provide significant benefit to the Namibian film and television industry. Industry and audience development activities must occur within Namibia and enable participation by Namibian audiences.

In 2018, the NFC launched a pan-African fund to encourage collaboration with other African countries and it also recently engaged in conversations with China. Among its upcoming initiatives is the construction of the country’s first fully serviced film studios.

**OTHER SOURCES OF FUNDING**

Outside of the NFC, alternative or complementary sources of funding are limited in Namibia. Filmmakers seeking additional funding for creative film projects find that there is little buy-in from local corporate or private investors due to the persistent lack of business model for film. However some commissioning from local broadcasters as well as sponsorships from local brands can be accessed.

**PROMOTION**

Currently there is only one film festival in Namibia - the Tala Film Namibia Festival (TFNF) - limiting opportunities for local film promotion or audience development. At the TFNF, the audience are allowed to vote for their favourite Namibian content. However, the Namibia Film Shop have made progress in creating a platform where a collection of local productions can be easily accessed.
Namibia benefits from several institutions offering undergraduate audiovisual programmes, including a diploma in TV Production at the College of Arts Namibia (COTA), a bachelor in Media Studies at the University of Namibia, diplomas in Film and Television Production or Creative Media Production at the Namibia Institute of Technology (NIT), and various long and short courses at the Namibia Film School. Since 2015, the Namibia Film Commission (NFC) has supported 52 COTA students specialising in TV productions with full tuition fees. The NFC also encourages all foreign productions coming to Namibia to take on and build the capacity of as many local trainees as possible in various departments. Local practitioners estimate that about 60 students graduate from these combined programmes every year with a reasonably strong set of skills, although these are currently more geared towards TV production than film.
NIGER

Population: 34.8 million
GDP per capita: US$ 1,219
Median age: 15.2 years
Urban population: 16.5%
Rural population with access to electricity: 11.7%
Mobile phone subscription: 40.6%
Internet users: 5.3%
Female upper secondary education completion rate: not available


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

Under the supervision of the Ministry of Cultural Renaissance, Arts and Social Modernisation (Ministère de la Renaissance Culturelle des Arts et de la Modernisation Sociale, MRC/A/MS), the Niger National Centre for the Film Industry (CNCN, Centre National de la Cinématographie du Niger) has been in operation since 2008. The centre has the objective of promoting the film industry in Niger.

The High Council of Communication (Conseil Supérieur de la Communication, CSC), created by the Constitution of Niger on 25 November 2010, is the regulatory body responsible for communication. It ensures and guarantees the freedom and independence of written and electronic media as well as audiovisual communication.

In November 2017, the Niger Federation of Filmmakers’ Associations (Fédération des Associations des Cinéastes du Niger) was created in order to defend film industry professionals’ interests. Among the founding associations of the Federation are Niger’s very first filmmakers’ association (Association des Cinéastes du Niger, ACN) created in 1970, Itinerant Digital Film (Cinéma Numérique Ambulant, CNA), Hikima Matassa, and the Nigerien Association of Film Clubs and Film Critics (Association Nigérienne des Ciné-clubs et Critiques de Cinéma, ANCCCC).

FILM AND AUDIOVISUAL POLICY

With the adoption of the National Cultural Policy (Politique Culturelle Nationale) by decree in 2008, Niger has equipped itself with an instrument for the promotion of artistic creation. Its stated mission is to “make Culture a means of affirming our identity, for building on new foundations, and a powerful lever for sustainable development, as well as an essential factor in integration and the fight against poverty”[1]. National film and audiovisual policy is based upon the creation of a framework and environment capable of enabling the restoration of a virtuous circle for the film industry as a whole.

The major priorities defined for the industry should enable the sector to flourish, namely the promotion of professional training in order to bring working filmmakers into step with technological changes, the implementation of visual literacy education programmes, the creation of a financial support framework for the film and audiovisual industry, and the development of production and broadcasting as well as infrastructures and facilities.

On the other hand, Niger does not have a quota policy for local content and incentives for the encouragement of production are non-existent.

COPYRIGHT PROTECTION AND PIRACY

Despite the fact that Niger has a high proportion of piracy, it remains difficult to quantify at the national level due to lack of data. The Niger Copyright Office (BNDA, Bureau Nigérien du Droit d’Auteur) is a public institution of an industry-based nature, placed under the technical supervision of the Ministry of Culture and the financial supervision of the Ministry of Finance. Created in 1996, the BNDA has the mission of protecting and defending the economic and moral interests of its members, encouraging national creativity, collecting and distributing copyright royalties, and combating piracy. It is the legal representative of all foreign societies of authors, by the sole fact of its becoming a member of the International Confederation of Societies of Authors and Composers (CISAC) on 15 October 1997. It should be emphasised that several artists (musicians, producers-filmmakers, etc.) create associations to protect their works. By means of individual and collective actions denouncing “pirate” distributors, certain artists’ complaints are filed with the BNDA.

PRODUCTION

FILM

Léon Poirier crossed the Niger filming La Croisière noire (1925), Jean d’Esme, a specialist in colonial novels, filmed La Grande Caravane in the east of the country in 1936, but it was above all Jean Rouch an engineer who built roads and bridges, that marked the first era of cinema in Niger when he turned to ethnography in 1947.

After independence, production was mainly supported by the Franco-Nigerien Cultural Centre (Centre Culturel Franco-Nigérien) and the Human Sciences Research Institute (Institut de Recherche en Sciences Humaines). Against this backdrop, Moustapha Alassane directed Aouré (1962) and La Bague du Roi Koda (1962),
La Mort de Gandji (1965), the first animated film on oral communication, which won a prize at the first edition of the World Festival of Black Arts (Festival Mondial des Arts Nègres), followed by other animated films such as Bon Voyage Sim (1966), and Return of an Adventurer (Le Retour d’un aventurier) (1966), the first African western.

Oumarou Ganda, then dock worker in the port of Abidjan, had played in Moi, un Noir by Jean Rouch (1957) before becoming a filmmaker: Cabascabo (1968) received the Bronze Tanit at the Carthage Film Festival and Le Wazzou polygame (1971) won the Étalon de Yennenga at the FESPACO in Ouagadougou.

Djingarey Maïga has directed many feature films, always bearing the word « black » in the title, Rahmatou Keïta won a prize at FESPACO 2017 for The Wedding Ring (Zin’naariyâ) (2016) and Moussa Djingarey directed Ma belle-mère, ma coépouse (2019), but it is above all Nigerian documentaries that have been presented in festivals in recent years, in particular from filmmakers Amina Weira and Aïcha Macky.

**TELEVISION AND VIDEO**

Niger has two public channels and around fifteen private channels, which could constitute an ideal framework for the production and broadcasting of Nigerien content. But only a few channels such as RTN, Tal TV, Dounia TV, and RTT produce (documentaries, sketches, fiction, etc.) to feed their programme schedule. They occasionally buy local films and sometimes even co-produce film projects.

The television series Maison Projet by Souleyman Mahaman, Nan and Aysinan and Xa Raconte, as well as the forty or so short documentaries and fictional films due to be broadcast on local channels are examples of the vibrancy of Niger’s audiovisual sector, with young filmmakers’ reflections on social questions. The production of commercials and video clips for private companies, institutions and artists is a flourishing activity.

**DISTRIBUTION, EXHIBITION AND BROADCAST**

**CINEMA EXHIBITION**

In 1960, Niger had ten theatres, six of which were private¹. Today, there is only one film theatre in Niamey, the Canal Olympia theatre of the Bolloré Group, which opened in 2017. In rare occasions, African and Nigerian films are premiered there.

Private, non-paying film clubs provide another means to watch films. Artists organise screenings and debates to which neighbours, friends and film lovers are invited in order to see Nigerien films in the presence of the directors. The film clubs travel between the villages for screenings of Nigerien films. The Nigerien Association of Film Clubs and Film Critics (Association Nigérienne des Ciné-Clubs et Critiques de Cinéma, ANCCCC) has set up film clubs in certain schools in the capital, holding debates on films in order to introduce young people to film culture. Training and conferences are also run during editions of certain festivals such as the Toukountchi Niger Film Festival initiated by the ANCCCC. Partners such as the Spanish and French embassies and the CNCN support these educational initiatives in the field of the audiovisual and film industry.
BROADCAST

The presence of television sets remains low, reaching barely 15% of households in 2019. Channel reception consists almost exclusively of free-to-air (FTA) channels, which continue to be distributed on terrestrial analogue networks. Niger has two public channels, ORTN (Office de la Radio et Télévision du Niger) and Tal TV, and some 15 private channels, including Dounia TV, RIT, Tambara TV, Labari TV, Uptako TV, Sarraounia TV, Fidélité TV, Bonferey TV, Anfani TV, Niger 24, and Gaskia TV.

The long-awaited transition to digital terrestrial television (DTT) remains uncertain in the short term, and direct-to-home (DTH) free-to-air satellite access is gaining ground among Nigerien households. The transition from analogue to digital has the potential to become a springboard for the local film and audiovisual industry.

The French telecommunications company Canal+ dominates most of the very small pay television market.

DIGITAL PLATFORMS

In Niger, video-on-demand platforms do not yet exist. However, some filmmakers regularly use platforms such as YouTube, Facebook, Vimeo, etc. in order to broadcast their films. Niger does not have an audience measurement system, but these platforms provide real-time information on the number of views of films, which can facilitate promotion of the work and the artist.

FUNDING SOURCES AND MECHANISMS

There are few funding mechanisms for the film and audiovisual industry in Niger. Film and audiovisual funding largely remains highly dependent on European support systems. The Niger National Centre for the Film Industry (Centre National de la Cinématographie du Niger, CNCN) sometimes provides support to filmmakers according to projects. Between 2016 and 2020, these projects received support mainly through equipment, including cameras, editing panels, projectors, among others. Producers can also obtain funding from private and international partners.

The assistance that these partners provide is often the provision of audiovisual equipment or technicians.

In general, the financing of films in Niger is a challenge. A few films, such as The Fruitless Tree (L’Arbre sans fruit) (2015) by Aicha Macky and Dédou (2015) by Souleyman Mahaman, manage to get support from the Organisation Internationale de la Francophonie (OIF) or the European Union (EU). Some rare projects such as Anger in the Wind (La Colère dans le vent) (2016) by Amina Weira and Koukan Kourcia and Les médiatrices (2014) by Sani Magori have given rise to international co-productions.

PROMOTION

Private initiatives attempt to support the promotion of cinema in Niger through the organisation of various festivals and other events to compensate for the lack of cinemas. Among the most important are the Niamey African Film Meeting (Rencontres du Cinéma Africain de Niamey, RECAN), the African Documentary Film Forum (Forum Africain du Film Documentaire), the International Environmental Film Festival (Festival International du Film d’Environnement, FIFEN), the International Human Rights Film Festival (Festival International des Films sur les Droits de l’Homme, FIFIDHO).

The ANCCCC supervises the Festival of Animated Films in Homage to Moustapha Alassane (Festival de Films d’Animation en Hommage à Moustapha Alassane, FAHMA.), the Niger Film Critics’ Week (Semaine de la Critique du Cinéma au Niger) and the newest of the festivals in Niger, the Toukountchi Nigerien Film Festival (Toukountchi Festival de Cinéma du Niger), which made its debut in 2016 and has forged partnerships with other festivals in Africa, including the Panafican Film and Television Festival of Ouagadougou (FESPACO, Festival Panaficain du Cinéma et de la Télévision de Ouagadougou).

EDUCATION AND TRAINING

The pioneers of cinema in Niger, such as Jean Rouh, Moustapha Alassane and Oumarou Ganda, were all self-taught.

The second generation of filmmakers (Moustapha Diop, Yaya Kosso, Mahaman Bakabé, Souleymane Mahaman, etc.) were trained in film schools in France.

Today, many young Nigerien filmmakers receive training leading to qualifications and diplomas in some film and audiovisual professions abroad and in Niger. Between 2017 and 2019, 27 industry professionals in production, directing, editing and camerawork graduated from the Information and Communication Technical Training Institute (Institut de Formation aux Techniques de l’Information et de la Communication, IFTIC). The Art and Culture Department of Niamey Abdou Moumouni University (Université Abdou Moumouni de Niamey) and the University Institute of Technology of Dosso (Institut Universitaire de Technologie de Dosso) also provide modular training courses in audiovisual production. Inter Média, the filmmaker Mahaman Bakabé’s private school, has specialised in training, usually in the form of modules, for certain professional occupations in the art of filmmaking for the past ten years. All of these training courses are relevant, but are not enough to support the development of a real film industry in Niger.

NOTES

6. DFR/IFTIC 2021
The sector is supervised by the Federal Ministry of Information and Culture. Under the ministry, film production, distribution and exhibition are overseen by the National Film and Video Censors Board (NFVCB), while television broadcasting is regulated by the National Broadcasting Commission. The Nigerian Film Corporation (NFC) is a government parastatal focused on the production of documentaries, educational materials, and archiving, and has recently been considered for commercialization by the federal government.

Stakeholders in the industry are represented by various guilds and associations. The Cinema Exhibitors Association of Nigeria (CEAN) represents cinema exhibitors, while theatrical distributors are under the Film and Motion Pictures Association of Nigeria (FDAN). Other organizations include the Directors’ Guild of Nigeria (DGN), the Actors Guild of Nigeria (AGN) and the Association of Movie Producers of Nigeria.

Noteworthy is the fact that two states in Nigeria, Lagos and Kano, have their own states Censors Boards. In the case of Lagos, the city being the hub and centre of Nollywood, the board works in collaboration with the NFVCB in implementing its regulations in terms of the fight against piracy, as well as licensing exhibition centers. Meanwhile, Kano’s board is more focused on censoring films in accordance with the state’s religious code.

FILM AND BROADCAST POLICY

The federal government of Nigeria regulates the film ecosystem through the operation of the National Film and Video Censors Board (NFVCB), established in 1993 under the National Film and Video Censors Board Act. The board’s policies reflect the position of the government on relationships with stakeholders, as well as conducts that apply to film production, exhibition and distribution. For instance, part of its policies includes classification of films for exhibition, where it determines age ratings for films to be exhibited in cinemas.

Also, the Board must license exhibitors and exhibition locations, amongst other responsibilities.

When it comes to the broadcasting sector, Nigeria’s local content quota is informed by the Nigerian Broadcasting Code. The NBC’s 6th amendment of 2019 ensured the inclusion of more defined regulations such as the requirement for all online broadcasters to be registered with the NBC and to operate by the code; the localisation of concepts to fit the Nigerian target audiences, also insisting on the directors and authors of programmes to be Nigerian; or the availability of sports exhibition rights to all classes of operators (satellite, cable, terrestrial).

Some specific sections of the amendment, such as the one precluding the use of exclusive licenses by broadcasters and platforms (with the goal of encouraging competition), have been widely debated within the industry. Based on the controversies and criticisms from stakeholders, the federal government is reviewing the amendment, especially the ban on content exclusivity.

COPYRIGHT PROTECTION AND PIRACY

Piracy presents a big challenge for Intellectual Property (IP) owners in the Nigerian creative space. It is estimated that Nigeria lost US$3 billion in revenue from creative works in 2019 due to digital piracy. IPs are protected under the Copyright Laws and regulated by the Nigerian Copyright Commission (NCC). The complexity of digitalisation in the area of IP necessitated the federal government to attempt revitalising its copyright laws in 2015. However, not much has been achieved in the process.

In 2007, the NCC, in alignment with international standard practice, established the Collective Management Regulation, to empower registered and licenced collection managers to aid IP owners in collecting revenues for their works.
Basically, they act as representatives of the artists, ensure the buyers have easy access to the content and remit revenues to the IP owners. However, the system has experienced some challenges, including the non-clarity as to what extent the collection organisations can legally represent the rights of the owners.19

Some Collective Management Organisations (CMO) in Nigeria include Copyright Society of Nigeria (COSON) and Musical Copyright Society of Nigeria (MCSON), both representing musical artists; Audio Visual Rights Society of Nigeria (AVRS), representing the audiovisual industry, and Reproduction Rights Society of Nigeria (REPRONIG), representing creatives in the literary industry.

The NCC has, however, embarked on a couple of strategic operations to combat piracy. They include the Strategic Action Plan Against Piracy (STRAP) and the Copyright Litigation and Mediation Programme (CLAMP), both enacted in 2005.20

**PRODUCTION**

The Nigerian creative industry (film, television, music, fashion, visual arts, gaming, etc.) is reportedly the nation’s second-largest employer of labour, after the agricultural sector.21 The film industry in itself currently employs over a million people who work directly or indirectly across the exhibition, distribution and production subsectors. The industry produces about 50 movies every week.22

There is no existing data as to the total number of film production companies operating in the country, which may very well be in the hundreds. The most prominent ones active in the theatrical space include EbonyLife Films, Inkblot Productions, Film Trybe, Scene One Production, FilmOne Entertainment, Play Network Studios, Toyin Abraham Productions, BBB Media, among others.

In addition to those, there are many independent filmmakers based in cities such as Asaba, Owerri, Enugu and Ibadan,23 whose contents are mostly locally distributed by individuals, and exhibited by pay TV and streaming platforms.

**FILM**

Filmmaking in Nigeria is as old as the inception of Nigeria as a British colony. The first feature film, *Palaver*, was produced in 1926 by Geoffrey Barkas and starred Nigerian actors. Since then, the industry has undergone different phases of development. After the country’s independence in 1960 and the indigenization decree of the then Head of State, Yakubu Gowon, ownership of cinemas was transferred to Nigerians from foreigners and indigenous productions began to thrive, with more local films making it to the box office.


The early 2000s introduced a transition from VHS to VCDs and DVDs, and an increase in production and consumption. Star actors such as Ramsey Noah, Genevieve Nnaji, Omotola Jalade Ekeinde, Uche Jombo Rodriguez, Kate Henshaw, Jim Iyke, Stella Damasus, Stephanie Okereke, Ini Edo and Pat Attah, to mention a few, starred in several romantic comedies and melodramatic films that became household names.

In 2004, modern cinemas returned with the establishment of Silverbird Cinemas, in Victoria Island, Lagos. A new generation of filmmakers became faced with the need to raise the production quality of their work in order to take it to the big screen. At the same time, a small group of filmmakers from the 90s era also became more ambitious with their storytelling. Kunle Afolayan’s *The Figurine* (2009) is widely considered to be the first “New Nollywood” film, marking a turning point in the creative development of the industry.26

Since 2009, Nollywood films have continuously thrived in Nigerian cinemas, in terms of both quantity and quality. With an improvement in funding from government loans and corporate financial institutions, filmmakers have enjoyed better production budgets and have managed to make films good enough to compete with Hollywood at the local box office. In 2014, popular stand-up comedian, Ayo Makun, produced his first feature film, *30 Days in Atlanta*, starring Hollywood A-list actress Vivica Fox, which went on to become the first Nollywood film to get a Guinness World Record recognition, grossing about US$1 million.27

In 2016, the ELFIKE collective (comprised of EbonyLife Films, FilmOne Entertainment, Inkblot Productions and Koga Studios),28 produced *The Wedding Party*, which surpassed all existing records and became the biggest film performance in Nigerian cinemas at the time, grossing in US$1.5 million.29 Since then, other local films, such as *The Wedding Party 2* (2017), *Chief Daddy* (2018), *King of Boyz* (2018), or *Sugar Rush* (2019), have risen to the top of the box office. In December 2020, when cinemas finally reopened after months of lockdown due to the pandemic, *Omo Ghetto: The Saga* became the latest highest-grossing movie of all time in the local naira currency, earning over US$1.3 million after a groundbreaking 11-weeks run at the box office.30

In addition to those, there are many independent filmmakers based in cities such as Asaba, Owerri, Enugu and Ibadan,23 whose contents are mostly locally distributed by individuals, and exhibited by pay TV and streaming platforms.
Nollywood films have not only encountered success at the cinemas, but also on the new streaming platforms such as Netflix. In 2020, Kenneth Gyang’s Oloture went on to rank as one of the top ten most-watched films in 25 countries upon its release on Netflix.31 A few months later, Kunle Afolayan’s Citation achieved a similar feat.32

While a certain category of Nollywood films are chasing commercial box office success, another type of filmmakers from Nigeria or its diaspora has been increasingly attracting attention at film festivals worldwide. Several films by locally based directors, such as Confusion Na Wa (2013) by Kenneth Gyang or 93 Days (2016) by Steve Gukas, have screened at international festivals like the Berlin International Film Festival,33 the Toronto International Film Festival,34 and the Durban Film Festival. Nigerian filmmakers from the diaspora are bringing international storytelling standards to authentic storylines with impressive results. In 2013, Chika Anadu’s B for Boy premiered at the 2013 London International Film Festival, while Shola Amoo’s The Last Tree made its debut at the 2019 Sundance Film Festival.35 2020 was a particularly prolific year for Nigerian filmmaking talent, with Eyiñme, directed by Chuko and Arie Esiri, screening at about 18 festivals and winning the Achille Valdata award at the Torino International Film Festival, Shine Your Eyes written by Chika Anadu and starring Nollywood Star, O.C. Ukeje, premiering at the 70th Berlin International Film Festival, and Lizard by Akinola Davies Jr winning Best Short Film at the Sundance Film Festival.

Finally, contributing to the global influence of Nigerian cinema is the noteworthy Hollywood success of many diasporan Nigerian actors, including David Oyelowo (Selma), John Boyega (Star Wars), Chiwetel Ejiofor (Doctor Strange), Hakeem Kae-Kazim (X-Men Origins: Wolverine), Caroline Chikezie (Supernatural), Sophie Okonedo (Hotel Rwanda) and Gbenga Akinnagbe (The Wire).

**TELEVISION AND VIDEO**

The advent of private stations across the country in the mid 90s created new distribution channels for Nollywood producers. The first Nigerian TV series, including home favourites such as New Masquerade, Basi and Company (written and produced by the internationally acclaimed writer Ken Saro-Wiwa), Things Fall Apart, Tales by Moonlight, and Checkmate, were produced in the 80s and 90s.36

Music videos are also a very popular type of content on Nigerian television, especially with the growing appeal of the Afrobeats music genre. The likes of Multichoice’s Channel O, Sound City, Trace TV, and MTV Base, are some channels dedicated to exhibiting music videos.
In Nigeria, Free-to-Air broadcasters such as NTA, Channels TV or Silverbird TV operate on the barter model, which means that producers are expected to purchase airtime from the channel with which they eventually split advertising revenue. The persistence of this model has stifled the growth of local creative content on Nigerian television. One exception is Wazobia TV, which pays for local content.

The pay TV segment has provided a lot more opportunities. Multichoice's Africa Magic channels and StarTimes' PBO TV have become major exhibiting platforms for Nollywood, through both the acquisition and commission of local content. Practitioners report that the acquisition and commission of platforms for Nollywood, through both PBO TV have become major exhibiting Africa Magic channels and StarTimes' lot more opportunities. Multichoice's The pay TV segment has provided a local content. Exception is Wazobia TV, which pays for content on Nigerian television. One has stifled the growth of local creative revenue. The persistence of this model which they eventually split advertising purchase airtime from the channel with which they operate on the barter model, which means that producers are expected to earn. EbonyLife ON, the company's VoD of all contents owned by the company has done this. Recent partnerships with Hollywood studios have also provided opportunities for Nigerian filmmakers, as companies such as Netflix and Disney have signed deals with Nigerian production companies.

DISTRIBUTION COMPanIES

Leading theatrical distributors, including FilmOne Entertainment, Silverbird Distribution, Genesis Distribution, Blue Pictures Distribution, Metro Pictures and Homeland Distribution, are associated under the auspices of the Film and Motion Pictures Distribution Association of Nigeria (FDAN). Other independent distributors such as Pinnacle Distribution, Viva Distribution and Kada Distribution operate outside of FDAN.

VCD and DVD distribution is mostly handled by independent distributors. Cities such as Lagos, Onitsha, Asaba and Ibadan are known to have several independent distributors, especially for local language films produced in these cities.

Some distributors under FDAN also maintain an aggregator relationship with ancillary platforms to help them secure films. For instance, FilmOne Entertainment recently renewed their contract to supply Netflix with 33 Nollywood titles, and have so far supplied some 70 films to the platform.

CINEMA EXHIBITION

Nigerian cinemas have grown in number of screens in recent years, from 218 in 1980 to 253 in 2020. Nigeria concentrates 94% of cinema locations in the Anglophone West African region. The Nigerian market is split between 40 different cinema exhibitors. In terms of revenue, Nigeria grossed about US$16.8 million in box office revenues in 2019.

The country was awarded the 2019 Emerging Cinema Market of the Year at CinemaCon, in Los Angeles.

In January and February 2020, prior to the pandemic lockdown, Nigerian cinemas recorded a growth in revenues of 11% and 21% respectively compared to 2019. However, the lockdown, which lasted for over five months, as well as the reduced seating capacity upon resumption contributed to an annual loss in revenue of about 75%, dropping to a little over US$4 million for the year. Nonetheless, the postponement of the release of most Hollywood titles to 2021 gave a boost to Nollywood titles which generated 55%, or about US$2.3 million of total box office revenue in 2020.

BROADCAST

Television in Nigeria was born in 1959, when the Western Nigerian Government Broadcasting Corporation (WNTV) began operations in Ibadan. Other WNTV stations opened across various regions in the country, until 1977 when it was renamed the Nigerian Television Association (NTA). State governments operated their individual stations until 1979, when the federal government directed that NTA control television broadcasting nationwide. NTA remained Nigeria's only TV channel until 1994, when the federal government licensed the first private television station, Galaxy TV. Since then, other private television stations have been licensed all over the country. Popular stations include Africa Independent Television (AIT), Channels TV, Silverbird TV, and Arise TV. In total, there are about 96 television stations in Nigeria.

As at 2019, over 74% of Nigerian homes owned televisions. Despite the federal government’s early engagement in the DTT transition agenda in 2012, the process is yet to be completed. When it comes to pay TV, subscription numbers are on a steady increase and are projected to reach 7 million households in 2023, and 10 million by 2025.
DIGITAL PLATFORMS

In the early 90s, at the advent of Nollywood, the initial distribution model for film was VHS, which later evolved to VCD and lastly DVD before physical copies went almost extinct. Sales of physical copies were the key revenue channel for filmmakers. However, piracy presented an insurmountable challenge of revenue losses. Today, digital platforms have made video streaming a key distribution channel for Nollywood contents.

Nigeria has the highest internet penetration rate in Africa, at 96.1% as of December 2020. Number of internet users in Nigeria rose to 99.5 million in 2020 from 85 million in 2019. Internet usage is expected to grow to 131 million in 2023 and reach 65.2% of the population in 2025, from the current 46.6%. About 79% of internet consumption happens via mobile phones, 19.18% is consumed via desktops and 1.13% via tablets. Google Chrome leads as the preferred browser with 58.41% of users, while opera comes second with 29.27%.

As of 2020, about 28 million Nigerians used social media networks. The number is expected to grow to 31.73 million by the end of 2021. Facebook leads in the number of users by 44.5% as of February 2021, followed by Twitter with 30.4%. Instagram and Pinterest come third and fourth with 10.22% and 9.12%, respectively, while only 4.81% of users consume content via Youtube.

As of January 2020, 83% of the nation’s population (169 million people) had mobile lines, which was an increase by 7.7% from January 2019.

In 2011, entrepreneur Jason Njoku launched Iroko TV as the first VOD service to target the Nigerian and Nigerian diaspora market, with its Youtube channel Nollywoodlove, which reached 150 million views in its first year. Iroko TV then moved away from Youtube to launch its own VOD platform, as well as an in-house production facility, Rok Studios, and three pay TV channels. In the past decade, the company has raised more than US$25 million in funding from US-based Tiger Global Investments, Swedish hedge fund Kinnevik, and French pay TV leader Canal+. In 2019, Iroko’s production studios and pay TV channels were acquired by Canal+, while Njoku vowed to continue to focus on the development of the VOD service. As of November 2020, Iroko TV recorded about 300,000 subscribers.

Other local players include IbakaTV, bank-owned platforms such as Ndana TV (GT Bank), Red TV (UBA) and Accelerate TV (Access Bank), and MyFilmhouse, a TVOD subsidiary of the Filmhouse Group, which ceased operations in 2019 but is on the verge of a return. Mobile operators also offer mobile video services, including Airtel and its recently launched Airtel TV.

Netflix officially entered the Nigerian market in 2019. That year, the platform was estimated to have attracted some 50,000 subscribers. The Covid-19 lockdown had a positive impact on the growth of digital platforms in Nigeria and across Africa. Netflix recently declared that its subscribers in Africa have grown to over 2 million, with Nigeria being a major market.

Multichoice’s Showmax is the other large pan african VOD platform available in Nigeria.

PUBLIC FUNDING

In 2012, the federal government, through the Creative Industry intervention fund, availed the industry financial support to the tune of US$200 million for film-related projects and businesses. The fund was disbursed by the Bank of Industry (BOI) as single-digit interest rate loans. It was the first time in the country that the federal government made such funds available for the entertainment industry including Nollywood. A renowned beneficiary of this fund is Filmhouse Cinemas, which from a three-screen cinema in December 2012, has grown to become the country’s largest cinema chain, with 13 locations and 58 screens in 7 states as of December 31st 2020.

In 2015, BOI initiated the Nollyfund, a US$5 million facility for the production of commercially viable films. To ensure its objectives were realised, the bank set up the Nollyfund Implementation Advisory Group, a team of cinema management experts, a national film distributor, production and post-production experts, film critics/reviewers, and film producers. The Group’s mandate was to critically review all the film scripts and associated budgets submitted to BOI by movie producers, and make technical recommendations to BOI for approval in line with the bank’s credit policy. A renowned beneficiary film project of the Nollyfund is Kunle Afolayan’s The CEO, released in cinemas in 2015.

In 2019, the federal government introduced the Creative Industry Finance Initiative (CIFI), also disbursed by BOI. Players in the film industry sub-sectors such as production and distribution companies, can get as much as US$83,300 and US$1.3 million respectively. At a maximum interest rate of 9%, beneficiaries are allowed up to ten years to repay their loans. BOI partnered with all commercial banks in the country to ensure that the fund is easily accessible.

Other beneficiaries of fundings from BOI include, but are not limited to, Silverbird Cinemas (digitization), Genesis Cinemas, G-media, as well as the producers of the films Half of a Yellow Sun and Flower Girl.

FUNDING SOURCES AND MECHANISMS

Since its inception in the 1980s, the Nigerian film industry has grown independently based on a purely commercial model, with productions often being self-funded by the filmmakers themselves. In the past ten years though, Nigerian filmmakers and entrepreneurs have started to gain access to new types of funding from different sources: the federal government, international organizations, as well as private investors.

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INTERNATIONAL GRANTS

Although Nollywood films are overwhelmingly funded locally, a few Nigerian projects were able to access international funding. For example, Bisola Akinmusuyiwa’s *The Legend of the Vagabond Queen of Lagos*, and Ike Nnaebue’s *No U-Turn*, a co-production between Nnaebue’s Passion 8 Communications, Steps and Don Edkins both from South Africa, received grants from the World Cinema Fund.

In addition to the WCF, filmmakers in Nigeria are also technically eligible for several other funds from international organizations, such as Slamdance Screenplay Competition, Vision Sud Est Fund, IDFA Beta Fund, One World Media, Art Moves Africa, etc. However, in reality most Nigerian producers working on fiction films do not choose to go the grant-funding route, which can be time-consuming. To the contrary, most Nigerian documentary filmmakers are supported by grants from NGOs. For instance, the African Culture Fund recently financed *Plateau*, a documentary centered on the mining of tin in Jos, Plateau State, developed by British-born Nigerian filmmaker, Karima Ashada. Also, in 2017, the European Union, under the auspices of the Fund ‘Instrument contributing to Stability and Peace’ (IcSP), sponsored a documentary titled *Plateau on the Move*, on the power of social mobilization and organization and its impact on economic growth.

PRIVATE FUNDING

Until recently, corporate private funding for the Nigerian creative industry was scarce. In the early 90s, when the Nigerian film industry began experiencing a boom, film projects were mostly funded by individual businessmen and from the personal savings of passionate filmmakers.

However, there currently exists a budding relationship between players in the industry and private equity firms, as well as with venture capitalists and other financial institutions.

In 2012, Tiger Global Management, a New York based private equity firm, invested US$8 million in venture capital in VOD startup Iroko TV. In 2018, the platform secured more funding when Canal+ and Kinnevik AB jointly helped to raise US$19 million to finance its scaling and aggressive expansion goals, some of which included investment in film production.

In 2014, private equity firm Africa Capital Alliance (ACA) invested US$20 million in financing the expansion and diversification of Filmhouse Group, owners of Filmhouse Cinemas and FilmOne Entertainment. Filmhouse went on to open more cinemas and diversify into film distribution and production.

Local commercial banks are also starting to dip their toes in film funding. In 2018, Keystone Bank Plc partnered with EbonyLife Films for the production of *Chief Daddy* which was released in Nigerian cinemas. In 2019, Access Bank launched AccessNolly, a US$2.78 million funding initiative geared at sponsoring the production and distribution of content of international standard.

In addition to this, a couple of Nollywood films have benefitted from brand sponsorships and partnerships. For instance, *The Wedding Party* and *The Wedding Party 2* both benefited from a partnership with Dubai Tourism.

Ebonylife also secured sponsorship from Johnny Walker for the *Royal*
Hibiscus Hotel screening at the Toronto International Film Festival in 2017.103 In 2015, popular stand-up comedian and filmmaker, Ayo Makun, became a brand ambassador for Peak Milk.98 Since then, he has enjoyed brand partnerships for his productions such as films *Merry Men 1 & 2* and his periodic comedy show *AY LIVE*. Director Kunle Afolayan also got endorsed as brand ambassador by Air France.96 Consequently, he has partnered with the company on some film projects, one of which is *The CEO*, which had its world premiere on board a commercial flight enroute from Lagos to Paris.97

Pay TV stations have also served as exhibiting platforms and hence, revenue streams for indigenous content through acquisitions or commissions. For instance, Multichoice’s Africa Magic has 19 stations dedicated to different content categories, such as epic, family and language.98 In 2020 Startimes, in partnership with PBO TV, launched a channel for Nollywood films.39

**EDUCATION AND TRAINING**

**PUBLIC INSTITUTIONS**

Most public universities in Nigeria, such as the University of Nigeria, Nsuka,110 offer film-related diploma and degree programmes as part of their Theatre Arts department or Theatre Arts and Film Studies,111 where students are educated on acting, directing and film studies as core parts of the course.112 The *National Film Institute (NFI)* of Jos in Plateau State is the one public institution fully dedicated to film studies. It offers both diploma and degree programmes, as well as professional short courses for various specialties in filmmaking.113

A plethora of Nigerian universities also offer degrees and diplomas in Mass Communication, which include courses in Broadcasting and TV.114 The Nigerian Institute of Journalism is a dedicated institution for media studies located in Lagos.

**PRIVATE PROGRAMMES**

Aside from the NFI, the major avenues of education and training for aspiring professionals in the country are several independent private institutions which offer certificate and diploma programmes. Some of these schools were founded by renowned veteran film or media professionals, such as the new Ebonylife Creative Academy owned by media mogul Mo Abudu. The academy, supported by Lagos State Government through the Lagos State Creative Industries Initiative (LACI), offers free short courses on screenwriting, production, directing, acting, lighting & cinematography, art direction and visual post-production.115 Del York Film Institute in Lagos offers courses ranging from screenwriting, directing, editing, 3D motion graphics, VFX, Drones, PR and Media Communications. Other notable programmes offering similar courses include the Multichoice Talent Factory, the Biola Alabi Film Lab, the Royal Arts Academy, PEFTI Film Institute (established by Wale Adenuga), the Lufodo Academy of Performing Arts (established by Joke Silva Jacobs) and the High Definition Film Academy.116

The animation sub-sector is growing rapidly due to the rising need for its services beyond filmmaking. As a fast-evolving industry, the challenge of skill acquisition and training is currently being addressed by individual studios through an apprenticeship approach. Some companies who adopt this method of training include Basement Animation, Anthill, Spooft, Quadron, Orange VFX and Mighty Jot Studios.117 A few institutions dedicated to cartoon and animation training,118 such as Earlybull Film School, also exist. They offer and issue certificates for courses such as 3D animation, Graphics/UI Designs, Visual Effects, Motion Graphics, etc.119

Recently, a Nigerian animator, Ridwan Moshood, won the 2020 edition of the Cartoon Network Africa’s Creative Lab competition. Moshood subsequently opened an animation company, Pure Garbage, partnering with US-based Baboon Network and the African Animation Network (AAN) to develop original content. AAN and Baboon Network are also keen on tackling the challenge of skill gaps and training, and are partnering with Boston Media House to launch training academies. Though they plan to start in South Africa,120 a continuous progress in their relationship with Moshood’s Pure Garbage may inspire an interest to train similar calibre of talents in Nigeria.
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The Rwanda Cultural Heritage Academy (RCHA), an agency affiliated to MYCULTURE, has responsibility to contribute to the promotion of artistic creations, including film.

The Rwanda Film Office (RFO) was established by the Rwanda Development Board (RDB) in 2019, and has been a major step towards creating a film-friendly environment and infrastructure. RFO is dedicated to the cultural, commercial and industrial success of Rwanda’s audiovisual industry seriousness and goal orientation is an important characteristic on all levels of the Rwandan society and administration. Its vision is to making Rwanda a premium filming destination in Africa and beyond through strengthening the audiovisual sector as a strong pillar that contributes to the national social transformation.

The RFO serves as a point of contact for the global and the domestic film industry, providing information on film locations, pooling local professionals and connecting them with international clients or investors, and promoting local productions within the country. In addition to its service function, RFO also trains students as location scouts.

The Rwanda Film Federation (RFF) unites all filmmaking professional guilds (directors’ guild, actors’ guild, screenwriters’ guild, etc.) and is the organisation in charge of speaking with the government on behalf of industry practitioners. It also studies requests for film permits and makes recommendations.

Broadcasting is overseen by the Rwanda Media Commission (RMC) while licences are provided by the Rwanda Utilities Regulatory Authority (RURA).

FILM AND AUDIOVISUAL POLICY
While Rwanda does not have a standalone film policy or bill, Creative Arts Industry sector is one of National Cultural heritage Policy pillars. The Rwandan government recognises the cultural and commercial value of the creative economy and of the film and audiovisual industry in particular. Cross-sectoral spillover effects, in terms of increased tourism revenues for example, further motivate the government to develop incentives to support the industry. Overall, the entire Rwandan creative sector is estimated to contribute 5% to the country’s GDP.

In 2018, the Rwanda Development Board hosted local and international producers, film commissioners, investors and officials to discuss how to create a viable African film industry during the first Kigali Audiovisual Forum. Tax breaks and incentives for film production were among the top topics of discussion.

To increase visibility and international exchange, the RFO is also in the process of establishing an international annual audiovisual conference in partnership with the Cologne Film Festival. The conference is expected to function as a networking platform, where challenges of the industry can be addressed, projects presented and business ideas exchanged.

A Marketing Strategies for the Promotion of Cultural and Creative Industries in Rwanda was developed in 2019. The film industry is part of the strategic document.

COPYRIGHT PROTECTION AND PIRACY
Practitioners estimate that 50-75% of the revenue generated from audiovisual content is lost to piracy in the country. Rwanda has had some form of IP framework since the 1960s. After its creation as part of legal and commercial reforms aimed at facilitating business entry and commercial activities, the RDB took over IP administration. The Office of the Registrar General established in 2008 has responsibility to daily manage the IP rights.

The Rwandan Society of Authors (RSAU) is a Collective Management Organisation (CMO) established in 2010 to collect and distribute the royalties for rights holders, act as the custodian of creative products, and distribute such products to clients.
In 2018, the country passed a revised policy on Intellectual Property (IP), which protects and enforces copyright laws. The IP Law includes extensive provisions on enforcement and provides a range of powers to the judiciary and special tribunals, the police and customs authorities to address IP enforcement. In March 2019, Rwanda Arts Initiative (RAI), a non-governmental and non-profit organisation partnered with UNESCO to develop a common strategy for intellectual property rights in Rwanda's cultural and creative industries. RAI proposed to support the implementation of IP rights in the cultural and creative industries through collecting and centralising data on public and private organisations working on the protection of IP rights, bringing stakeholders together to design an online platform that facilitates communication and collaboration in the implementation of IP law, and raising awareness of IP rights in CCI.

The project was expected to strengthen cross-sectoral cooperation in the implementation of IP law in Rwanda, the processes and mechanisms for the implementation of IP law, and the role of civil society in the enforcement and implementation of IP rights.

PRODUCTION

Production of film and audiovisual content in Rwanda remains in a nascent stage. Limited investment in the sector made it difficult for players to access the necessary equipment, knowledge and skills that they need to produce content according to global standards. Nevertheless, practitioners estimate that about 20 production companies currently operate in Rwanda, and that the industry has created 1,000 direct and 6,000 indirect jobs.

FILM

Having only emerged after 1994, the Rwandan film industry is less than three decades old. A number of producers and directors got their start on NGO-funded documentaries. In the mid-2000s, Rwandan filmmakers, like many of their contemporaries across the region, started producing low budget films to distribute locally on DVD, but that market was quickly phased out with the digitalisation of the economy.

Many of the early films released in Rwanda were centered on the theme of the genocide. However, the industry is now moving away from this topic to tell other stories. Recently, a small group of pioneers have managed to build a community structure with the capacity to train young filmmakers, showcase Rwandan talent, and introduce cinema into Rwandan culture. This tight-knit group is comprised of directors who are all very well integrated in the international film co-production ecosystem, such as Eric Kabera, Kivu Ruhorahoza, Amelia Umuhire, Sam Ishimwe, Philibert Mbabazi, Clementine Dusabujambo, Joel Karekezi, Ganza Moise, Shyaka Kagamé, and Janvier Mutiganda. Their films, which include Grey Matter (2011), Imbabazi: The Pardon (2013), Kickin' It With The Kinks (2016), Bounty (2017), Impfura (2017), winner of the Silver Bear at the Berlin Film Festival, and The Mercy of the Jungle (2018), have made an impact at film festivals worldwide. They stand united in their goal to support the development of the Rwandan film sector.

The 26th Pan-African Film and Television Festival of Ouagadougou (FESPACO) featured Rwanda as the Guest Country of Honor and the Rwandan film Mercy of the Jungle directed by Joel Karekezi has won the Gold Etalon de Yennenga, the coveted top prize of the biennial Festival also known as the Oscars of Africa, held in Ouagadougou in 2019.

In the past 20 years, Rwanda also hosted a few major foreign film shoots, such as Shooting Dogs (2005), Sometimes in April (2005), Munyarangabo (2007), Africa United (2010), Our Lady of the Nile (2019), and Petit Pays (2020), which played a role in training a number of local technicians. In July 2021, Neptune Frost, a Rwandan-set sci-fi film co-directed by Saul Williams and Anisia Uzeyman, premiered at the Cannes Film Festival's Directors' Fortnight. These productions still have to bring in skilled crew and equipment from other countries such as Kenya or South Africa. But thanks to the positive signals sent by the government, Rwanda is becoming an increasingly attractive film destination. Before the pandemic, a dozen major Hollywood productions were lined up to shoot part of their films set in Angola, Congo, Cameroon, or South Sudan in Rwanda. Overall, practitioners estimate that on average about ten local films and two foreign films are shot each year in the country.

TELEVISION AND VIDEO

Budding Rwandan filmmakers find work producing commercials for local brands, or music videos for popular musicians such as Bruce Melodie. Local TV channels do acquire local content, and some entertainment entrepreneurs like Nelly Misago, who produces two popular local TV dramas, City Maid and Seburikoko, are starting to fill the gap in locally-produced TV programmes. In November 2020, Canal+ International launched Canal+ Rwanda. The company plans to commission TV series and feature films, with the goal to eventually launch a 100% Kinyarwanda channel.

The most notable development in the video space has been the rise of YouTube as a sustainable source of revenue for Rwandan producers, who have also found online the freedom to create more innovative content. In the past couple of years, web series have become extremely popular both locally and across the Kinyarwanda-speaking world. These series are mostly in the comedy or soap opera genre, such as Papa sava, featuring comedian Nyiritegeka Gratien, or Marine, produced by Blackwell Films and which gripped fans during the pandemic in May 2020. Other series attracting large audiences on Youtube include City Maid, Seburikoko, Idiotic Thieves by Pattyn, and Nyako Comedy and Military Love by Afrimax TV. In fact, the success of YouTube channels such as Afrimax TV or Isimbi TV is such that they have become more influential than traditional media houses.
For a long time, Rwanda had only one cinema, Century Cinemas at the Kigali City tower, predominantly showing Bollywood and Hollywood movies. In December 2020, French media conglomerate Vivendi opened a Canal Olympia venue in Kigali, the company’s second one in an anglophone country after Nigeria. The leisure complex, which comprises a 300-seat cinema, an outdoor stage, and an escape games area, promises to promote local productions.

The channel reception consists primarily of free-to-air (FTA) channels, distributed through the digital terrestrial networks implemented as early as 2013 in the country. The FTA market consists of one public TV station and 18 private channels. Private broadcasters in Rwanda face challenges of the low level of advertising revenue, most of which goes to the government broadcaster.

The international operators DStv/MultiChoice, Canal+, StarTimes and Azam offer audiovisual services in the country’s estimated 304,643 pay TV subscribers. Canal+ has been available since 2012, partnering with Tele10, private Rwandan company in bringing digital TV services to citizens in various parts of the country, as well as taking local channels like RTV, TV10, TV1, FLASH TV, ISANGO TV, AUTHENTIC TV, BTN, and GENESIS TV to audiences outside the country. In November 2020, Canal + announced that it would provide training, financing, and promotion platforms to Rwandans working in the entertainment and media sectors.

The Ministry of Youth and Culture, in collaboration with Imbuto Foundation under the support of Korea International Cooperation Agency (KOICA), has set up a grant for the financial year 2020-21 to support projects, which are intended to be of benefit to the development of artists, including those from film industry. This grant was managed and coordinated by the Business Professionals Network (BPN).

Local artists, individuals as well as local companies or organisations submitted projects through online platform on Art-Rwanda website. The grant funded 30 outstanding projects. In July 2020, the government launched the Cultural and Creative Industry Recovery Plan to help artists and filmmakers weather the COVID-19 pandemic period.

The Rwanda Film Office project, which currently sits under the Tourism section of the Rwanda Development Board, has the potential to eventually become a permanent institution mandated to provide funding to support local productions, and there are ongoing conversations about future enabling measures such as tax incentives.

For film, a handful of Rwandan filmmakers have accessed grants from international organisations such as the World Cinema Fund and other festivals’ development schemes, the Organisation Internationale de la Francophonie (OIF), NGOs, even private foreign funding, such as the documentary The 600. Producers of TV programmes can count on commissioning or licencing fees from broadcasters such as Canal+, or from local VOD platform Zacu TV.

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However, when it comes to the financing of creative audiovisual content, the most notable evolution in recent years has been the emergence of YouTube as a reliable source of revenue for Rwandan filmmakers. Young creators have been able to draw consistent returns from the online distribution of self-funded web series which have become popular with the global Kinyarwanda-speaking audience. This new model has been infusing new dynamism in the Rwandan filmmaking community.29

Finally, the Urusaro International Women Film Festival, created and managed by CinéFEMMES RWANDA, promotes women and gender equality in cinema.30

Rwandan filmmakers and representatives from the RDB are also routinely present at major regional and international festivals and markets such as the FESPACO, European Film Market at the Berlin Film Festival, the Cannes Film market, DISCOP or MIPCOM.

PROMOTION

Rwanda counts four major film festivals, attracting an estimated 10,000 festival goers annually. Launched in 2015, the Mashariki African Film Festival30 celebrates African cinema culture by bringing a lineup of feature films honoring creativity, traditions, and heritage. In 2021, the festival will take place in parallel to DISCOP Africa,31 and will include a range of programmes with a major focus on business in the film industry and celebrating African stories on big screens. The festival is set to screen more than 90 films taking place in more than five locations and it is expecting more than 5,000 participants.

The Hillywood festival, organised by Rwanda’s leading filmmaker Eric Kabera, aims at ‘taking Hollywood to the thousand hills of Rwanda’.32 The festival began as a mobile cinema initiative taking films to communities in the countryside, and has become a key event in the local creative industry. Hillywood attracts industry players who want to interact and helps Rwanda’s film industry develop an international reputation.

The Rwanda Film Festival celebrates African films (from the continent and the diaspora) and a selection from international (PANORAMA) highlighting the best in African filmmaking and potential newcomers in the industry and arts of cinema.33

EDUCATION AND TRAINING

PUBLIC

Practitioners estimate that about 50 people undergo some sort of film or audiovisual training annually in Rwanda. The only public institution to offer a film or audiovisual-related programme is the University of Rwanda, the country’s largest public institution, which has an elective audiovisual course unit within the department of journalism34. It does not offer any degree or diploma in film or audiovisual studies.

PRIVATE

A number of private institutions have recently started offering film and audiovisual programmes accredited by the Workforce Development Authority (WDA), spurred by new interest from the government in the sector. The Kigali film and television school (KFTV),35 is one of the prominent audiovisual schools in the country accredited by WDA, training professional filmmakers, photographers, film and television actors, music audio producers, and graphic designers. The Africa Digital Media Academy (ADMA),37 offers courses in all areas of the digital media industry. In 2019, the Rwanda Development Board (RDB) in partnership with the Korea International Cooperation Agency (KOICA) established a state-of-the-art Innovation Centre that focuses on fostering entrepreneurship and innovation in the audiovisual and creative industry, covering the whole value chain from pre-production, production and post-production.38

Power & Constraint is a highly-rated training workshop organised by filmmakers Philibert Mbabazi and Sam Ishimwe. Students of the programme produce two short films annually that are then shown at international film festivals, with the effect of putting their directors on the map. IgaSinema, organised by production companies Ejo Films and Eyugi and supported by the German cooperation, focuses on training technicians to take Heads of Department (HOD) positions on international productions. After the intensive two-week program, trainees get hired to act as HODs on a local film to gain practical experience. Foreign cultural centers such as the Goethe Institut, through its partnership with the Mashariki Film Festival (“Tumene Sinema” – Let’s Learn Cinema programme),29 and non profits such as Kwetu,40 also offer short courses or workshops, as well as on-the-job training.

Students interested in acquiring film or audiovisual skills sometimes travel outside the country to take part in short training programmes around the East Africa region (such as the Maisha Film Lab,41 the Film Pro Series,42 or Docubox,43 or beyond. In the past couple years, the rising number of international productions shooting in the country, such as Our Lady of the Nile,44 and Petit Pays,45 have also provided valuable training grounds for dozens of Rwandan film technicians.

Overall, practitioners agree that, as Rwanda’s audiovisual sector continues to grow, more standardised training opportunities, conducted by qualified trainers with professional equipment, will be required for aspiring filmmakers to improve their skills.
NOTES

3. Facebook: Rwanda Film Office https://www.facebook.com/rwandafilmooffice/
24. Inyarwanda https://inyarwanda.com/
27. The 600 Movie http://the600movie.com/
29. Ibid
30. Facebook: Mashariki African Film Festival https://www.facebook.com/masharikifest/
33. Rwanda Film Festival https://festagent.com/en/festivals/rwanda_fest
34. http://www.cinefemmesrwanda.org/unsaroiwflf/
36. Kigali Film School: Who We Are https://www.kigalifilmschool.com/
38. RDB, RDB, KOICA inaugurate ICT Innovation Center https://dbb.rw/rdb-konica-inaugurate-ictinnovationcenter/
SAO TOME AND PRINCIPE

Population: 0.3 million
GDP per capita: US$ 3,964
Median age: 18.6 years
Urban population: 73.6%
Rural population with access to electricity: 55.7%
Mobile phone subscription: 77.1%
Internet users: 29.9%
Female upper secondary education completion rate: 7%


INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The Ministry of Culture is the public institution responsible for the film and audiovisual industry. Law no. 1/01 of 2001 regulates television access and diffusion on the national territory.

ASSECOM (Associação São-Tomense de Entretenimento e Comunicação Multimédia – Cultural e Artístico) is the main association supporting the creation of policies in the film and audiovisual sector.

FILM AND AUDIOVISUAL POLICY

Stakeholders have indicated that there is not yet any political policies for the sector in the country, despite efforts on the part of civil society organisations.

COPYRIGHT PROTECTION AND PIRACY

Sao Tome and Principe is a member of ARIP (African Regional Intellectual Property Organization), but stakeholders indicate that there is no sign of a national regulation of copyright. Film and audiovisual content copied on the internet principally circulates on the informal market without any regulation in the archipelago.

PRODUCTION

FILM

After Sao Tome’s independence, filmmaking was focused on nation-building, with documentaries made by the Ministry of Information, the narratives of which centered on the protagonists of political parties.

The logic of production in recent decades has shifted from nation-building to development issues, namely to questions related to the protection of the environment, ecology, culture and memory. On political memory, the Sombras do Poder documentary films by Nilton Medeiros and Jerónimo Moniz in 2020 are noteworthy examples.

Not to mention the films Serviços, das Memórias à Identidade by Nilton Medeiros (2017), São Tomé e Príncipe: Relatos de uma História by Nilton Medeiros and Jerónimo Moniz (2015), and Mionga ki Òbo - Mar e Selva (2005) by the director and actor Ângelo Torres. Also of note is A Ilha dos Cães by Jorge António, a feature-length fiction film produced in 2017, which made a great impact on the island. The documentaries O Conto de Ossobó by Silas Tiny, presented at DocLisboa 2017 and Na terra como no céu (2010) by the Portuguese director Inês Gonçalves.

Among films made since the early 2000s, two works stand out: the documentary Tchiloli - Identidade de um Povo by Felisberto Branco and Kälü Mendes (2010), and Rosa do Riboque by Alberto Bragança and Januário Afonso (2017). These films are the result of the Programme for the Promotion of the Production and Dissemination of Audiovisual Content of the Community of Portuguese Language Countries (CPLP).

TELEVISION AND VIDEO

The public television channel TVSTP focuses on information and entertainment. Broadcasting is limited to less than 24 hours per day. TVSTP devotes most of its programmes to news and serials imported primarily from Brazil. Another important part of the programmes is devoted to awareness-raising campaigns: road safety, preventive health, etc. The local content is primarily educational in nature and is produced by employees of the channel.

Several Portuguese soap operas and series have been produced in the territory of Sao Tome, such as RTP’s Milongo in 1994, TVI’s Equador in 2011, SIC’s Golpe do Destino in 2016; and in 2017, part of the screenplay for the SIC’s soap opera Amor Maior was recorded in Sao Tome.

Portuguese TV channels also produce documentaries in Sao Tome and Principe, such as the documentary series Sao Tome and Principe: a world to discover in 2017 and Sao Tome and Principe: 30 years later, and in particular Na Roça com os tachos, a cookery programme which made a great impact on the audience of RTP Internacional and RTP África.
DIGITAL PLATFORMS

Fixed broadband remains limited with 5% of households having Internet access via a fixed connection in 2019. Mobile Internet will probably remain the principal means of access due to the low level of electrification, lack of reliable Internet infrastructures and the high cost of data. Sao Tome and Principe’s two telecommunications companies, CST and UNITEL, as well as DStv South Africa, provide satellite television.

Netflix is available to those who have a foreign IP. The number of subscribers is not very great due to limited local purchasing power and the costs associated with internet.

FUNDING SOURCES AND MECHANISMS

Existing sources of funding are connected with non-governmental organisations within the framework of development programmes and private institutions connected with tourism and the hotel business. The ICA (Portuguese Film and Audiovisual Institute) has already financed certain projects such as the film A ilha dos Cães (2017) by the Portuguese-Angolan director Jorge António.

The Programme for the Promotion of the Production and Dissemination of Audiovisual Content of the Community of Portuguese Language Countries (CPLP) has financed a number of documentaries within the framework of DocTV CPLP.

Portuguese television channels such as RTP (Rádio Televisão Portuguesa) and TVI have financed the production of projects of Portuguese origin, such as the production of the television series Equador on the Portuguese channel TVI, in 2008.

EDUCATION AND TRAINING

The University of Sao Tome and Principe does not provide any options in the fields of film and audiovisual media. The Social Sciences and Humanities curriculum provides higher education in the field of journalism. International cooperation services in the country, such as the Centro Cultural Português do Instituto Camões, provide assistance, in particular through the provision of short training workshops.

NOTES

3. https://www.facebook.com/events/79664747156118
5. https://holofote.sapo.pt/televisao/2017-01-26-elenco-de-amor-maior-parade-sao-tome-e-principe/#&gid=0&pid=1
8. https://www.facebook.com/events/205882450485757
REGULATORY INSTITUTIONS

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

Over the years, Senegal has created many structures to develop its film industry. The creation of “Senegalese News” (Actualités sénégalaises) by the Ministry of Information headed by the filmmaker Paulin Soumano in 1961 marked a first initiative. A Cinema Bureau (Bureau du cinéma) was also created at the urge of the first generation of Senegalese filmmakers. In 1972, the National Cinema Society (Société Nationale de Cinéma, SNC) took over as a structure capable of promoting the production and co-production of films in Senegal. From the beginning of its activities in September 1973 until its dissolution in 1977, the SNC co-produced six feature films: L’arroseur arrosé by Sembene Ousmane, Le Bracelet de bronze by Tidiane Aw, Baks by Momar Thiam, Boron Xam Xam by Maurice Dores, L’option de Thierno Sow, Njangane by Mahama Thraoré, and three short films. This was followed by the creation of the Company of Import, Distribution and Cinematographic Exhibition (Société d’Importation de Distribution et d’Exploitation Cinématographique, SIDEC) in 1974 and the Company of Import, Promotion and Cinematographic Exhibition (Société d’Importation, de Promotion et d’Exploitation Cinématographique, SIMPEIC) in 1991.

Through the Decree No. 78-300 of April 12, 1978, the State set up the Film Industry Support Fund (Fonds de Soutien à l’Industrie Cinématographique, FOSIC) aimed at supporting Senegalese filmmakers. In 1983, the New Society of Cinematographic Promotion (Société Nouvelle de Promotion Cinématographique, SNC) was also created. Since then, as a result of structural adjustment plans by the State, the cinema was no longer a priority.

Today, the Film Industry Directorate (Direction de la Cinématographie, DCI), under the authority of the Minister of Culture (ministre chargé de la Culture), implements the Senegalese State’s policy in the fields of the film and audiovisual industries. It is the principal state body identified in Senegal for representation and regulation.

The National Council for the Regulation of the Audiovisual Industry (Conseil national de Régulation de l’Audiovisuel, CNRA), established by Law 2006-04 of 4 January 2006, is responsible for providing responses to the challenges of the new audiovisual scene and anticipating changes in the audiovisual system.

FILM AND AUDIOVISUAL POLICY

The activities of production, distribution and promotion in the film and audiovisual industries are governed by Law No. 2002 - 18ª. Among the decrees, one establishes the organizational and operating modalities of the FOSIC.

According to the DCI, current policy consists of “developing the film and video industry in order to make it a vector of growth and development of the local economy and employment in Senegal in a direct and indirect manner, in particular through training and professionalisation of the value chain, development and reinforcement of facilities and infrastructures, finalisation of the regulatory frameworks, establishment of incentives for the financing of creations and the development of an internal and export audiovisual market.

COPYRIGHT PROTECTION AND PIRACY

The Senegalese Copyright Office (Bureau sénégalais du droit d’auteur, BSDA) was created in 1972 with the mission of protecting authors and their works. After 43 years of existence, it was replaced by the Senegalese Society of Copyright and Related Rights (Société sénégalaise du droit d’auteur et des droits voisins, SODAV) established in December 2013 with the support of all stakeholders in the Senegalese cultural world and the public authorities. The creation of the SODAV, in the form of a non-profit copyright society, represented a step toward the implementation of Law No. 2008-09 of January 25, 2008 on copyright and related rights.

PRODUCTION

FILM

Senegal’s first contact with cinema dates back to 1900 with the screening of the film L’arroseur arrosé by Louis Lumière. A series of films was subsequently produced on Senegal. It was not until 1955 that the association called “African cinema group” made up of two Senegalese, Mamadou Sarr and Jacques Mello Kane, the Dahomean (actual Benin) naturalized Senegalese Paulin Soumano Vieyra and the Antillean Robert Caristan, produced a short film in Paris titled Afrique sur Seine.
In 1966, *La noire de...* by Senegalese Sembène Ousmane was shown during the World Festival of Black Arts, becoming the first film by a black filmmaker from Sub-Saharan Africa to receive international attention.

The history of cinema in Senegal above all represents a thirst for images and messages for its people about their identity, expressed by filmmakers, conscious of the power of images; Ousmane Sembène being the most outstanding example. His film *Borom Sarret* (1962) in the first years of independence, is considered the first film made in Africa by a black African, even though Paulin Soumanou Vieyra made *Afrique sur Seine* in 1955. It was, however, Sembene Ousmane’s film *Le Mandat* (1968) that placed Senegal in the map for the first time.

Over the years and the different film policies in place, Senegalese cinema forged a path for different generations of filmmakers such as Djibril Diop Mambety, Ben Diogaye Bèye, Ababacar Samb Makharam, Mahatma Johnson Traoré, Samba Félix Ndiaye and later Moussa Sène Absa, Moussa Touré, Mansour Sora Wade, before the arrival of a younger generation - Alain Gomis, Angèle Diabang, Moly Kane, El Hadji Samba Sarr and Mati Diop, among others.

In the 1990s, due to economic difficulties, the sector is no longer a priority. This brought about a decline in the film industry.

It was not until 2015, after the success of *Today* (2012) by Alain Gomis (Gold Étalon de Yennenga at the FESPACO), *President Dia* (2012) by Ousmane William Mbaye (Documentary Award at FESPACO) and *La Pirogue* (2012) by Moussa Touré (Un Certain Regard section at the Cannes Film Festival), that the public authorities started to financially endow the Fund for Promotion of the Film and Audiovisual Industry (Fonds de Promotion de l’Industrie Cinématographique et Audiovisuelle, FOPICA), created by decree in 2004.

Other awards followed, including *Félicité* (2017) by Alain Gomis (Gold Étalon de Yennenga at FESPACO 2015 and Silver Bear at the Berlinale), *Atlantique* (2018) by Mati Diop (Grand Prix du Jury de Cannes 2019) which further demonstrated that Senegalese cinema has a future while it is supported.

In this revival, a greater presence of women should also be noted, through the work of Angèle Diabang, Katy Léna Ndiaye, Rama Thiaw, Khady Sylla, Khadidiatou Pouye, Diana Gaye, Laurence Attali, Laurence Gavron, Mati Diop, etc. One Senegalese filmmaker explains it as the result of the development of society, while stressing that, when all is said and done, what matters is to tell stories which concern our own contexts and are also universal.

The DCI lists 110 production companies established in Senegal and 900 Senegalese films produced between 1960 and 2020. The most dynamic of these are: Cinekap; Karoninka Prod; Indigo Films, Marodi Films, Les Films Mame Yandé, Buzz Studio SARL, Sunuy Films, Sie Sky Pictures Entertainment, Mediatik Com, Even Prod, Studio Sankara, LOGUISS Cineprod and Pikini Production.
TELEVISION AND VIDEO

Digital technology has made it easier to popularize audiovisual practices, especially within younger generations.

With the audiovisual boom beginning in the 2000s, the advertising and video production sector has vastly expanded. Private initiatives have come into being and the resulting job creation has enabled numerous young graduates to pursue careers in production and filmmaking. The sector is still expanding in a very unstructured way and the absence of reliable data makes this economic activity difficult to assess.

Senegalese television series achieve great public success such as Maîtresse d’un homme marié, which has millions of views on YouTube. Mention should also be made of the series Sakho et Mangane, produced by Canal+ International and Keewu Productions and broadcast on Netflix (after achieving success on All 4, the online platform of the British Channel 4 television station). The series JigeeN, Karma, Dikon, Adja, Goldar and Nafi are also highly popular, contributing to the emergence of a local audiovisual industry.

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CINEMA EXHIBITION

Senegal is experiencing a revitalisation of the sector with the revival of cinemas in West Africa. Private initiatives such as the Ousmane Sembène Complex (Complexe Sembene Ousmane) and Canal Olympia are contributing to this revival with nine screens, including eight in Dakar, as well as eleven film exhibition and distribution organisations. For its part, the French company Pathé has announced its intention to invest in the creation of new movie theaters.

In addition, projection projects such as Ciné Banlieue, the itinerant Digital Cinema Project (Cinéma Numérique Ambulant) and MobiCiné complete the country’s cinema projection services. The Culture WAW Association’s MobiCiné project received support from the European Union and UNESCO through the International Fund for Cultural Diversity (IFCD) in 2018, and now has mobile projection units in six of Senegal’s provinces.

BROADCAST

The market penetration of television sets in Senegal is constantly increasing at the same time as the increase in access to electricity, reaching around 60% of households in 2019. The majority of households still receive free-to-air (FTA) channels, the most common means of access being digital terrestrial television (DTT) since the beginning of the DTT transition in 2015. As in other countries of francophone Africa, the pay television market has been dominated by the international actor Canal+ for years, in the face of local actors operating MMDS and DTT pay television services. The Chinese telecommunications company StarTimes is currently expanding in the country.

Television undoubtedly constitutes the best showcase for the dissemination of fictional films and especially series, which have a growing audience among viewers. However, it should be specified that no quotas have been set for the broadcasting of local content.

DIGITAL PLATFORMS

The DCI lists 15 working platforms. The Marodi TV platform provides an example of great popular success primarily on the basis of a catalogue of local television content.

The Senegalese market remains extremely small in volume and value terms. The principal obstacles to the development of the online video market include lack of means of payment, shortage of suitable content in terms of location and language and the low level of broadband market penetration, quality and accessibility. The SVOD market is dominated by Showmax (MultiChoice), with its services available free of charge to the satellite pay television telecommunications company’s subscribers. Other available platforms include Amazon Prime Video, Trace Play (Trace TV) and iROKO + (iROKO Group).

Mobile market penetration exceeded 100% of the population in 2014 and reached 109% in 2019. The mobile market is shared between Expresso, Orange and Free (formerly Tigo Mobile, the subsidiary of Millicom purchased by the French company Africa Holding in April 2018). Sirius Telecom Africa is expected to launch its commercial activities shortly as a mobile virtual network operator (MVNO) providing services, among others, on the Free network. 33% of mobile subscribers had access to the Internet via their mobiles in 2019, partly offsetting the low rate of market penetration of fixed broadband services.

FUNDING SOURCES AND MECHANISMS

The Fund for Promotion of the Film and Audiovisual Industry (Fonds de promotion de l’industrie cinématographique et audiovisuelle, FOPICA) provides the first financial support for the sector. Since its creation, it has made it possible to support the birth of several films, many of which have won awards at international events.

The Funds of La Francophonie (Fonds de la Francophonie), set up by the International Organisation of La Francophonie (Organisation Internationale de la Francophonie, OIF), are of great importance for the funding of both film and audiovisual projects in Senegal. This financial support is intended for development, production and post-production.

In the context of the COVID-19 pandemic, the Senegalese government has mobilized US$500,000 to support production companies, filmmakers and film and audiovisual technicians, who had submitted a memorandum to the authorities requesting the setting up of a fund to provide social assistance to their professional class and support the revival of their sectors.
In view of the significant growth and popularity of television series, channels are beginning to become involved in financing these projects.

The broadcasting of highly successful series by the most important local television channels generates significant advertising revenue for producers, who keep 60-70% of the revenue.20 Product placement in scripts is also a regular source of funding.

The tremendous success of Senegalese series in Africa and the African diaspora is pushing production companies to diversify in order to seek international revenues. EvenProd has already started dubbing several series into French and is considering dubbing them into English to be broadcast by local television stations in anglophone and francophone African markets. This strategy has already been adopted by the Marodi platform, which affirms that foreign television stations are its third source of revenue, after Senegalese channels and YouTube.

Canal+ International, which purchased Marodi’s two flagship TV dramas in order to broadcast them on its A+ channel, has seized the opportunity of the potential market represented by the African diasporas. A year ago, the audiovisual giant launched Sunuyeuf, a channel entirely dedicated to this kind of format and to plays in Wolof. The French group is already broadcasting TV dramas, dubbed into English to be broadcast in various professional occupations. This need has given rise to a plethora of options, at various levels and in various fields, of centres and institutions providing training.

The DCI provides backing and support to various training organisations, including Fotti Cultures, the Yennenga Centre (Centre Yennenga)22 and Kino Téranga,23 which organized 110 workshops and training seminars between 2019 and 2020.

The needs and dynamics of education and training attract the interest and participation of directors and producers. The Yennenga Centre (Centre Yennenga), directed by the Franco-Senegalese filmmaker Alain Gomis, has the ambition of training and supporting the continent’s young talents in order to enable films to be made 100% in Africa. This organisation is intended to be a place for training, creation and production of African films and aims to become a film industry centre and to provide vocational training to young people in film industry occupations, particularly in postproduction and editing.

Within his production organisation Cinekap, the producer Omar Sall has been developing the Up Court Métrage short films24 training programme for a number of years, which provides (eight-month) periods of training, including the production of nine short films as an integral part of the programme.

**EDUCATION AND TRAINING**

With a logic of effectiveness and performance, the revival of cinema in Senegal and the effect of TV series have naturally raised the obligation to provide training in the various professional occupations. This need has given rise to a plethora of options, at various levels and in various fields, of centres and institutions providing training.

The DCI provides backing and support to various training organisations, including Fotti Cultures, the Yennenga Centre (Centre Yennenga)22 and Kino Téranga,23 which organized 110 workshops and training seminars between 2019 and 2020.

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**NOTES**

13. https://www.agenceecofin.com/opoebts/2411-
17. https://www.marodi.tv
mobile/countrySelection=senegal
20. https://www.lemonde.fr/afrique/article/2020/10/25/les-series-senegalaises-a-lassaut-de-la-planete-pour-faire-de-dakar-un-petit-
hollywood_6057309_3212.html
24. https://cinekap.com/up-courtmetrage
SEYCHELLES

Population: 0.1 million
GDP per capita: US$ 29,056
Median age: 34.2 years
Urban population: 57.1%
Rural population with access to electricity: 23.8%
Mobile phone subscription: 184.3%
Internet users: 58.8%
Female upper secondary education completion rate: not available


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The Ministry of Local Government, Sports and Culture - Department of Sports and Culture - is the Seychelles government institution responsible for the film and audiovisual industry. The Cultural Policy document of the Republic of Seychelles states that one of its objectives is to promote and encourage the development of Seychellois feature films and documentaries, as well as media, for cultural promotion and development.

The Film Classification Board established in 1994 is responsible for determining whether a film is suitable for general viewing or subject to restrictions in accordance with the Cinematographic Film Censorship Act.

The Cine Sesel association, relaunched in 2017 after a hiatus, brings together professionals and works for the development of filmmaking in Seychelles.

FILM AND AUDIOVISUAL POLICY

Two laws exist for general governance of the media: the Seychelles Media Commission Act (SMC Act 36 of 2010) and the Licences Act, Act 23 of 2010 (Licences Act). The amended version of the Media Communication Act, in force since 2011, states its objectives as being "to preserve the freedom of the media, improve and maintain high standards of journalism in Seychelles, require publishers of newspapers, radio and television broadcasters, news agencies and journalists to respect human dignity, freedom from discrimination on any grounds except as are necessary in a democratic society, and to maintain high standards of integrity and good taste."

The Broadcasting and Telecommunication Act gives the State the right to license broadcasting companies.

COPYRIGHT PROTECTION AND PIRACY

Stakeholders estimate that less than 25% of income from the film and audiovisual industry is lost due to piracy. The Republic of Seychelles joined the World Intellectual Property Organization (WIPO) in 2000 and the Seychelles Authors and Composers Society (SACS) is the collective management organization appointed to protect the interests of its members and collect royalties from music users on behalf of its members.

PRODUCTION

Audiovisual production is mainly limited to advertising content and commercial orders which are broadcast by the public television channel. Stakeholders estimate the number of production companies active in the country at around twenty. The number of direct jobs within the sector is estimated at 400.

FILM

Filmmaking in Seychelles is very relative. Cliff Moustache, a Seychellois director living in Norway, is the only Seychellois filmmaker identified as working on a film project.

However, a few foreign films have been shot in the country, with crews and equipment that usually came from neighbouring Mauritius, including Good Bye Emmanuelle (1977) by François Leterier, Tarzan, the Ape Man (1981) by John Derek, and Pirates (1986) by Roman Polanski. Moreover, known for the beauty of its beaches and its enormous tourist potential, Seychelles has become the idyllic setting for high-end advertising films and travel and tourism films produced by foreign companies. This production does not seem to make any significant contribution to the development of local skills.

TELEVISION AND VIDEO

In the absence of a structured funding policy, local production companies principally rely on the small advertising, corporate videos and events market.

In terms of television production, most economic activity is centred on the Seychelles Broadcasting Corporation (SBC). The majority of its programming is produced in-house and is principally composed of studio programmes and, more recently, series. In 2019, for the first time in its history, the SBC acquired the broadcasting rights for an independent production, common practice being to pay for the broadcasting airtime.
DISTRIBUTION, EXHIBITION AND BROADCAST

CINEMA EXHIBITION

The country has two cinemas with one screen each. Their programming consists mainly of American blockbusters and occasional films from Europe. On one occasion, a film produced jointly with Sri Lanka was premiered at a local cinema.

BROADCAST

Television viewing in Seychelles has been at high levels for several years, reaching 99% of households in 2019. With regard to free-to-air (FTA) services, signals are broadcast on the terrestrial network. The transition to digital television was launched in 2018, but is still not completed and for the time being the system is hybrid.10

Apart from the SBC, the country also has a private pay television channel, TV Sesel, with an estimated 4,000 subscribers.

The Cable & Wireless Seychelles, DStv (MultiChoice) and Intelvision telecommunication companies compete for market share in the pay television segment.

DIGITAL PLATFORMS

Mobile use exceeded 100% of the population in 2009 in Seychelles and reached 200% in 2019. The market is shared between Airtel and Cable & Wireless. 60% of mobile subscribers had access to the Internet via their mobile in 2019.11

The Netflix, Showmax and Canal Play streaming platforms are technically available in the country, but the VOD market remains very weak in terms of volume and value.

FUNDING SOURCES AND MECHANISMS

There is no source of public funding for the film and audiovisual sector in Seychelles. Local production is financed by orders of a commercial nature and on an occasional basis, and to a limited extent, by NGOs within the framework of awareness-raising campaigns.

PROMOTION

The Underwater Photo and Film Festival and the Regional Education Film Festival are held in Seychelles but do not appear to be events of a regular nature. The stakeholders contacted indicate that these events have a limited impact that primarily concerns the tourism industry.

EDUCATION AND TRAINING

No existing programme in Seychelles provides training in the filmmaking and audiovisual field. Most training takes place at the public television station within the framework of the SBC Learning programme, which regularly trains between 15 and 20 people in the fields of production, shooting, lighting and montage. The majority of beneficiaries come from the SBC and many become self-employed after their training.

In its short existence, the Cine Sesel Association has given impetus to training courses aimed at developing local talent.12 Short courses are also provided by India and on a few occasions short training workshops have been organized by the National Arts Council and the Alliance Française des Seychelles.

NOTES

2. https://seylii.org/sc/legislation/consolidatedact/78a
9. https://sbc.sc
10. https://sbc.sc/dtt/
Part 3 • National mappings

SIERRA LEONE


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

Sierra Leone has no institutional framework dedicated to the film and audiovisual sector. However, the Ministry of Tourism and Cultural Affairs, the Monuments and Relics Commission, and the Ministry of Trade and Industry together regulate the entertainment industry.

FILM

The National Telecommunication Commission (NATCOM), and the Independent Media Commission, regulate the media sector in Sierra Leone.

The Sierra Leone Film Council, the Sierra Leone Film Guild, and the Sierra Leone Editors Guild, are the umbrella organisations for film producers and media owners.

Sierra Leone does not have a film or audiovisual policy. The regulatory framework for the creative industry remains to be defined and the importance of this sector needs to be promoted.

COPYRIGHT PROTECTION AND PIRACY

Efforts to update the country’s legal framework have thus far included the Copyright Act 2011, the Patents and Industrial Design Act 2012, and the Trademark Act 2014 but these laws need to be implemented.

According to film practitioners, the film and audiovisual sector suffers 75% revenue loss due to piracy.

PRODUCTION

Three emerging film production companies operate in Sierra Leone, mostly on low budgets: Premier Media, WeOwnTV, and African Young Voices Television. Together, they release at least a dozen films and over 100 sponsored documentaries, music videos and corporate advertisements every year, mostly for individuals and organisations. Practitioners estimate that only a handful of people are employed in the film and audiovisual sector in Sierra Leone.

FILM

The majority of films about Sierra Leone are made by foreign production companies shooting outside the country, as Sierra Leone’s infrastructure has been badly damaged during the Civil War (1991–2002).

Amistad (1997) and Blood Diamond (2006) are the two widely known films about Sierra Leone, but they were both shot elsewhere. Sierra Leone’s only home-made documentary of note, Cry Freetown (2000), was directed by Sorious Samura. The film was produced with the assistance of CNN Productions, the Dutch news programme 2Vandaag and Insight News Television, and won numerous awards including the Emmy Award, BAFTA Award, Peabody Award and the 2001 silver award at the Alfred I. du Pont–Columbia University Awards.

In 2018, Survivors, a film about the Ebola outbreak by Arthur Pratt, was produced by WeOwnTV with international partners and was screened at numerous festivals. It was also nominated for an International Emmy and a Peabody Award.

There also exists a small industry of independent filmmakers making low-budget movies that are sold on the streets of Freetown. One example is A Stitch in Time (2014), a popular Sierra Leonean Ebola sensitisation movie. The film was shot during the Ebola crisis, was produced and directed by Sierra Leone ‘movie-king’ Jimmy B, and financed by mobile operator Africell and the United States Embassy in Sierra Leone. A more recent film is Lohe and Lohehe (2020) by Abdul Salam Turay, director of New Generation Network.

TELEVISION AND VIDEO

A small set of videographers earn a living by filming wedding ceremonies and music videos, while most of the commercials are produced in-house by local TV stations or done out of the country.
DISTRIBUTION, EXHIBITION AND BROADCAST

CINEMA EXHIBITION
Sierra Leone’s cinemas all closed during or after the Civil War (1991-2002). Currently there are no cinemas operating in the country.

BROADCAST
The penetration of TV sets reached 20% of households in 2019, receiving almost exclusively free-to-air (FTA) channels. The signals are broadcast through analogue terrestrial networks, as the implementation of digital terrestrial television (DTT) remains belated. Most Sierra Leoneans cannot afford television due to challenges to access electricity. Sierra Leone is yet to achieve digital migration. The country has four television stations, including the public Sierra Leone Broadcasting Corporation (SLBCTV), and the private channels African Young Voices Television (AYV), Star TV, and Freetown Television Network (FTN).

The operators DStv (MultiChoice), Azam and StarTimes compete for market share in the pay TV segment.

DIGITAL PLATFORMS
In January 2021, Sierra Leone recorded 2.39 million internet subscribers. There were 8.07 million mobile connections in Sierra Leone in January 2021, an equivalent to 100.1% of the total population.

There are no streaming platforms available in the country. Smartphone users are few.

FUNDING SOURCES AND MECHANISMS

PUBLIC FUNDING
There are no public or private sources of funding for the film and audiovisual sector in Sierra Leone. Filmmakers are usually left to use their own resources for production, marketing and distribution.

PRIVATE FUNDING
The WeOwnTV Filmmaker Fellowship (managed by Bertha Foundation) is a film fund and professional development programme supporting the production of independent documentaries directed by West African filmmakers, open to filmmakers who are living and working in Ghana, Guinea, Liberia, and Sierra Leone. The programme provides filmmakers with funding for their project, creative labs, one-on-one mentoring, professional development workshops and networking opportunities.

PROMOTION
The Sierra Leone International Film Festival (SLIFF) is an annual year-round collaborative film exploration featuring ongoing education programmes and an annual film festival. Through its programmes, SLIFF creates a platform for audiences to discover the culture and communities of Sierra Leone as they experience cinema from around the world. A week-long tour of films which runs twice a year – April/October – is held in the country alongside film workshops.

The British Council also organises European Film Festivals which showcase local and international films.
EDUCATION AND TRAINING

PUBLIC INSTITUTIONS

The University of Sierra Leone has a theatre department, which offers degree and diploma courses in film, theatre, filmography and also communication courses in Print and Broadcast journalism, Public Relations and Advertising, Radio, Television and Video Production and Multimedia.

PRIVATE INSTITUTIONS

Unveiled in 2014, the Malaysian institution Limkokwing University - Sierra Leone branch - offers degree and diploma courses in Multimedia and Animation, Broadcasting, Journalism, Graphic Design and Digital Media. The University has the honor of being Sierra Leone’s first foreign university. Limkokwing University, through a Public Private Partnership (PPP) signed a Memorandum of Understanding (MoU) with the Government of Sierra Leone through the Ministry of Education Science and Technology. The Memorandum signed stipulated that the Government of Sierra Leone will pay for a set of students who are Sierra Leoneans wishing to enroll into the University through a form of Grant-in-aid.

Salone Film School in Freetown offers diploma and short courses in Directing (Fiction), Cinematography, Editing, Screenwriting and Production. Established in 2011, the IDF Film School offers training courses in film too. Film students in the West African country also benefit from short courses and workshops at Freetown Film Labs. This is a British Council programme which aims to support the development of skills required by young and emerging filmmakers towards the development of documentary or scripted concepts. The programme is co-delivered by Freetown Media Centre (Sierra Leone) and Nova Studios (UK).

The Ladima Film Academy under the Ladima Foundation, a Pan-African non-profit organisation supports, trains, and mentors women in a variety of roles within the film, TV, and content spaces. Through partnerships and collaborations in various countries, as well as through Pan-African networks and interventions, the Ladima Foundation develops training, networking, and related opportunities for women professionals in several African countries including Sierra Leone.

NOTES

6. Africa Young Voices: https://ayvnews.com/AYV2021/?page_id=808
8. Survivors https://www.survivorsfilm.com/
11. WeOwn TV: Filmmaker Fellowship. https://www.weenotv.org/fellowship
14. UNESCO: Setting-up of a theatre department at Fourah Bay College. https://unesdoc.unesco.org/ark:/48223/pf0000059119
16. Limkokwing University. https://www.limkokwing.net/sierra_leone/academic/courses
18. Film Making: Salone Film School. https://www filmmaking.net/filmschools/school.php?id=1723
SOMALIA

Population: 15 million
GDP per capita: US$ 314
Median age: 16.7 years
Urban population: 45.6%
Rural population with access to electricity: 29.7%
Mobile phone subscription: 51%
Internet users: 2%
Female upper secondary education completion rate: 5%


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The Ministry of Education, Culture and Higher Education is responsible for determining the policies and direction of the culture system in Somalia.1

More specifically, when it comes to film, the Somali Film Agency (SFA) oversees the importation, distribution and broadcasting of movies in the country.7 The Somali Filmmaker Association, established in 1985, represents the interests of filmmakers in the country.3

For broadcasting, the National Communications Authority regulates the Communications sector including telecommunications, internet, broadcasting, Information and Communications Technology, and eCommerce services.4 Several journalistic associations operate as non-governmental organisations in Somalia, providing basic support for journalists.5

FILM AND AUDIOVISUAL POLICY

Somalia does not have any policy specifically related to the film sector. However there are some efforts currently underway to develop a cultural policy for the country.

For example, in November 2020, UNESCO joined forces with the Somalia Academy of Science and Arts (SOMASA), the Somali National Commission for UNESCO, and the Somali Permanent Delegation to UNESCO, to organise a national consultation meeting with national, international experts and other key stakeholders in the culture sector in Somalia. The goal of the consultation was to develop a National Strategic Plan for the safeguarding and promotion of tangible and intangible cultural heritage in Somalia.6

In the audiovisual sector, the National Communications Act of 2012 established the National Communications Authority, while the 2016 Media Law was amended in 2020. It contains clauses that promote freedom of expression and opinion and press freedom and provides for public service broadcasting, thereby helping to promote editorial independence and public accountability.2

COPYRIGHT PROTECTION AND PIRACY

It is estimated that between 75% and 100% of revenue from creative works is lost to piracy in Somalia.

ICLG – Copyright Laws and Regulations – covers common issues in copyright laws and regulations including copyright subsistence, ownership, exploitation, owners rights, copyright enforcement and criminal offences.8

Somalia does not have a Collective Management Organisation (CMO) which collects revenue from licensing for content creators.

PRODUCTION

Data on revenue generated for film in Somalia is unavailable. However, practitioners estimate that some 20 production companies are active in the country, and that around 100 people are employed directly or indirectly in the sector.

FILM

Cinema was first introduced to Somalia in the form of newsreels from 1913 to 1934.9 Somalis established a motion picture industry when the country attained independence in 1960. In the 1970s, the Somalia Film Agency was created to oversee the production and importation of films in the country.

Most films that emerged in the early 1960s, such as Love Does Not Know Obstacles (1961) by Hussein Mabrouk, the Somali-Chinese collaboration The Horn of Africa (1961), which won the highest prize at the 4th International African Film Festival held in Mogadishu, and Hadj Mohamed Giemale’s Miyo Iyo Magaalo (1968),10 were all based on the rich storytelling Somali tradition. Notable Somali films of the 1980s include The Somali Darwish (1983),11 by Said Salah Ahmed, and Charles Geshekter’s The Parching Winds of Somalia (1984).12 A few Somali filmmakers have been recognised at international film festivals. Sentinels of Bronze (1937)13 was awarded at the Venice Film Festival, and in 1988, Somali film director Abdulkadir Ahmed Said’s short film Geedka nolosha (The Tree of Life) received the Best Short Film prize at the Tokyo International Festival of Young Cinema.
In the 1990s and 2000s, Somaliwood, an informal name for the Somali film industry, emerged in Columbus, Ohio in the United States, where a strong Somali diaspora community has settled. The filmmakers introduced innovative scripts, production techniques and advertising strategies based on Somali storytelling art. Abdisalam Aato is credited as one of the pioneers of Somaliwood. Through his production company, Olo Films, based in Columbus, he has produced several feature films and documentaries including *Rajo* (2013). Other Somali filmmakers from the diaspora, such as Somali-American Idil Ibrahim, and Alisha Ilhaan Boe who is based in Oslo, Norway, are active in the international independent film circuit. Ibrahim is an independent film director, producer, actress and writer. In 2008, Ibrahim served as an Associate Producer on the feature documentary *Americana* which was an official selection of the 2009 Cinéma du Réel Festival at the Centre Georges Pompidou in Paris, was selected for the Margaret Mead International Documentary Film Festival and the Dallas AFI Film Festival. Alisha Ilhaan Boe is known for portraying Jessica Davis in the Netflix original series *13 Reasons Why* (2017) and horror film *Amusement* (2008). Finally, a couple of foreign films such as *The Insanity of God* (2016) and *Mogadishu Soldier* (2016) have been shot in the country. The complex recent history of Somalia also inspired a few Hollywood productions, such as *Black Hawk Down* (2001), *Captain Phillips* (2013), *Fishing Without Nets* (2014), *Eye In the Sky* (2015), and *The Pirates of Somalia* (2017), although none of these films were shot in Somalia. Since his acting debut in *Captain Phillips*, which earned him a British Academy Film Award for Best Actor in a Supporting Role, along with Academy Award, Golden Globe Award, and Screen Actors Guild Award nominations, Barkhad Abdi has become the most well-known Somali actor on the global stage.

The current state of film production from within Somalia is difficult to evaluate, but practitioners estimate that about 100 films are produced locally every year.

**TELEVISION AND VIDEO**

Local creatives can sometimes hope to sell content to local VOD services or TV stations, but mostly distribute and market their work online on social media. Most filmmakers or videographers typically survive by producing wedding or music videos or news reports.

Somalia counts a number of private TV stations, but they mostly carry news. There is no quota for local content on television, and practitioners estimate that local content represents between 10-30% of programming on Somali TV stations.

**DISTRIBUTION, EXHIBITION AND BROADCAST**

**CINEMA EXHIBITION**

Somalia has eight cinemas, four in Mogadishu and four in Hargeisa in Somaliland. Local viewing centers showing old movies and videos for an admission fee are also common.

**BROADCAST**

The penetration of TV sets reached around 24% of households in 2019, receiving almost exclusively free-to-air (FTA) channels. The signals are broadcasted through analogue terrestrial networks, as the implementation of digital terrestrial television (DTT) remains overdue. MultiChoice, through its brand DStv, holds a monopoly on the small pay TV market.

There are three public television stations. Private stations are Eastern Television Network (ETN TV), Somali Broadcasting Corporation (SBC TV), Horn Cable Television (HCTV) Eastern Television Network (ETN TV), etc.. Three private channel re-broadcasts of Al-Jazeera, BBC (BBC Somali) and CNN are also available.
There are also several Somali-owned private television stations headquartered abroad which broadcast to Somalia. Among these are Somali TV of Minnesota, and Dalmar TV of Columbus, Ohio. Universal TV airs from London, and is the first and largest Somali television satellite network. Royal TV and Somali Channel TV also broadcast to Somalia from their UK studios.

**DIGITAL PLATFORMS**

As of January 2020, there were 7.55 million mobile connections in Somalia, representing 48% of the total population, while 10% of the population (1.63 million people) are internet users. Social media users are 1.60 million.²⁷

The Somali telecommunications market is split between four operators: Golis Telecommunications, Hornmuid, Somafone and Telesom.

VOD subscription numbers are not available but in all likelihood exceedingly small. Local operator Presta Bist VOD services over a broadband wireless network.²⁸

**FUNDING SOURCES AND MECHANISMS**

There is no public funding for films in Somalia. Filmmakers either self-fund their projects or depend on grants from NGOs or other entities.

In 2011, the Abu Dhabi Film Festival launched the SANAD Development and Post-Production Fund with the goal of encouraging independent and auteurs-based cinema and supporting filmmakers from the Arab world, including Somalia. Through this initiative, Somali filmmakers can now access financial grants, screenwriting and pitch workshops, and personal meetings with industry mentors and experts.²⁹

**PROMOTION**

Launched in 1987, the Mogadishu Pan-African and Arab Film Symposium (Mogpaafs) was held annually and organized by the Somali Film Agency. However, since Mogpaafs’ shut down, there has been no record of film festivals being held regularly in Somalia.

The FilmAid Film Festival that takes place in the Dadaab refugee camp in northern Kenya does showcase the work of young Somali filmmakers living in the camp.³⁰

**EDUCATION AND TRAINING**

There are no public or private institutions of higher learning offering programmes specifically dedicated to film or audiovisual studies in Somalia. Public universities such as the University of Somalia (UNISO),³¹ the Somali National University,³² and the University of Hargeisa in Somaliland, offer degree courses in communication which include courses in public relations, journalism and media.

A few private film development initiatives are accessible to Somali filmmakers. The Somali Film Institute is a non-profit organisation formed to tell uniquely Somali stories while building the capacity of Somalia’s film industry.³³

The Dubai International Film Festival, in partnership with the European Audiovisual Entrepreneurs (EAVE)³⁴ training organisation, extends to Somali filmmakers their programme of development and co-production workshops earmarked for directors, screenwriters and producers from the larger Arab region. Finally, FilmAid also offers film training courses.³⁵

**NOTES**


4. NCA. https://nca.gov.so/


16. Idil Ibrahim is An Award Winning Filmmaker https://www.idilibrahim.com/about

17. IMDb: Alisha Boe. https://www.imdb.com/name/nm2647981/?ref_=mm_av_bio_sm


32. Somali National University. https://snu.edu.so/

33. Facebook: Somali Film Institute. https://www.facebook.com/SomaliFilmInstitute/

34. European Audiovisual Entrepreneurs. https://eave.org/about

35. FilmAid. September 22, 2020. The 13th annual FilmAid Film Festival will be Online November 12th - 24th. https://www.imdb.com/title/tt3147944/
SOUTH AFRICA

Population: 57.8 million
GDP per capita: US$ 12,143
Median age: 27.6 years
Urban population: 66.4%
Rural population with access to electricity: 66.9%
Mobile phone subscription: 153.2%
Internet users: 56.2%
Female upper secondary education completion rate: 52%


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The National Film & Video Foundation (NFVF), an agency of the Department of Sport, Arts & Culture (DSAC, the main custodian of the CCI sector), is mandated by the NFVF Act to develop, promote and transform the sector, through the provision of grants and bursaries, training programmes and promoting the industry at home and abroad. Their work is supplemented by provincial Film Commissions (which report to the regional Economic Development Departments) - the KwaZulu-Natal Film Commission, the Gauteng Film Commission, the Eastern Cape Development Corporation and Wesgro in the Western Cape, who also offer grants and training for regional producers and productions (Wesgro, however, do not provide grants). They, in turn, are supported by City Film Offices, for example, the Durban and Cape Town Film offices which provide logistical support to productions filmed in their jurisdictions. In an attempt to improve coordination and collaboration between all the departments noted above, the South African AV Forum, an intergovernmental body, has been established.1

The industry has various industry bodies, the largest of which is the Independent Producers Organization (IPO) which represents over 70% of the country’s producers. The IPO seeks to ensure a conducive environment in which the industry and all throughout its value chain can flourish. It identifies and shares new developments and international industry best practices.

The Independent Black Filmmakers Collective (IBFC) represents a broad spectrum of people active in the industry, with the aim of enhancing the industry’s transformation and economic development. Sisters Working in Film & TV (SWIFT) addresses the specific needs of women working the sector, Animation South Africa (ASA) is a guild representing and promoting the interest of the country’s growing animation sector, while the Documentary Filmmakers Association (DFA) represents people throughout the documentary value chain. The country also has a guild for actors (SAGA), for editors (SAGE), for writers (WGSA) and for agents and talent managers, the PMA. All the above organisations are members of the South African Screen Federation (SASFED) which advances the cause of the entire sector.

Other smaller organisations represent regional or demographic-specific interests in the sector. The National Association of Broadcasters represents the interests of the country’s public and private broadcasters.

Regulation of the sector is undertaken by two organisations. The Independent Broadcast Authority of South Africa (ICASA) regulates both the telecommunications and broadcasting sectors. It functions under the Department of Communications & Digital Technologies (DCDT).

The Film & Publications Board (FPB), also reporting to the DCDT, is responsible for classification of content. It aims to ensure effective consumer protection through regulation of films, games and certain publications, balancing the right to freedom of expression with an obligation to protect children from exposure to potentially disturbing, harmful and inappropriate materials; and protecting children from sexual exploitation in media content. The oversight function of these bodies and the broadcasters falls to the Parliamentary Portfolio Committee on Communications.

FILM AND BROADCAST POLICY

A revision of the 1996 White Paper on Arts & Culture2 is now on its Fourth Draft (published 27 October 2017) after more than a decade. It aims to promote and develop the Arts, Culture and Heritage sector in line with the Bill of Rights in the country’s Constitution, which enshrines the freedom of expression and the freedom of artistic creativity alongside the right of everyone to use the language and participate in the culture of their choice, and mindful of the National Development Plan: Vision 2030, the Mzansi Golden Economy (MGE)3 strategy and the Industrial Policy Action Plan 2 (IPAP2), all of which seek to stimulate economic activity and job creation.
While the NDP and IPAP make mention of the creative industries, the MGE has an integral focus on repositioning the arts, culture and heritage sector as an economic growth sector, as well as introducing programmes to facilitate large-scale employment.

In 2020, the DCDT published the draft White Paper on Audiovisual content services, arguably one of the most important pieces of policy for the sector to emerge in the past two decades. It aims to bridge the gap between the legislation applicable to the sector and technological advancements and trends which have come with the global digital revolution. Amongst others, it seeks to impose licence and local content quotas on streaming and other platforms while redefining the structure and funding of the public broadcaster, SABC, and revising local content quotas. Comments on the paper were submitted on 15 February 2021 and revised draft is expected for further public comment.

Local content quotas for broadcasters, and the compliance monitoring and enforcement thereof, is the domain of ICASA. These differ per broadcaster and cover not only overall percentages, but also languages, genres, regional representation and others. In May 2020, in light of the Covid-19 pandemic, ICASA amended the regulations, effectively exempting all broadcasters from having to broadcast any local content at all until three months after the State of Disaster if lifted, post-pandemic.

The Film and Publication Board regulates online content and also published amendments to the FPB Act in 2019 which, when enacted, will extend compliance obligations to online broadcasters. The Department of Employment & Labour is also in negotiations with the sector regarding the status of freelancers, either to deem them as employees or to allow self-regulation frameworks to ensure compliant labour relations, the latter being the preferred option.

This is an unprecedented time with almost all Government departments involved in the audiovisual sector amending or introducing new legislation and regulations. While they are well-intentioned and progressive, several aspects of these proposals (including the Copyright and Performers Protection Bills – now referred back to Parliament amid Constitutional concerns, the DTIC’s Rebate Incentive Scheme and doing away with Sections 12 O and 12 J of the Income Tax act, as mentioned below) contain elements which some believe represent threats to the future viability of the industry and could see the imposition of financial and administrative constraints on producers to the detriment of the entire sector.

**COPYRIGHT PROTECTION AND PIRACY**

Also long in the drafting, with the ‘final’ version having been referred back to Parliament in 2020, is the Copyright Amendment Bill, which deals with IP rights, copyright, royalties and piracy.

Administration of the 15 pieces of legislation relating to corporate and intellectual property is the remit of the Copyright & Intellectual Property Commission (CIPC). Its mandate encompasses companies, close corporations, co-operatives, trademarks, patents, designs, aspects of copyright legislation and enforcement of rules and regulations in most of these areas of law. At the time of writing, there is no available data to point to the scale and impact of piracy on the country’s audiovisual sector, however it is estimated that some 25-50% of revenue is potentially lost to piracy.

There are nine Collective Management Organisations in South Africa. A review of these CMOs by the country’s Copyright Review Commission identified cases of impropriety, prompting the review of the copyright law as referred to above. The Motion Picture Licensing Company (MPLC), established 30 years ago, caters for the film and audiovisual sector. The film and audiovisual sector is catered for by the Motion Picture Licensing Company (MPLC), established 30 years ago. It represents over 900 Rights Holders, from major Hollywood studios, to independents, TV, special interest and international producers.

It provides legal authorisation, often as an ‘umbrella license’, for film and audiovisual content viewed outside the home, which is considered a ‘public performance’, to avoid copyright infringement.

**PRODUCTION**

South Africa’s cultural creative industries have seen a rise in activity and economic contribution in recent years. The direct impact (also called ‘Value Added’) of the CCIs in 2018 was US$5.51 billion accounting for 1.7% of GDP (compared to 1.5% in 2016). Taking the Direct Effect, Indirect Effect, and Induced Effect into account, the CCIs total effect on the economy was US$18.01 billion, or 5.6% of the country’s GDP. This GDP contribution has grown at an average of 2.4% per annum, which is significant compared to the economy as a whole, which was only 1.10% p.a. over the same period.

Notably, the local Audiovisual and Interactive Media sector, which has seen significant increase in local appeal and international recognition in recent years and which is the main driver of advertising revenues for broadcasters, enjoyed one of the highest growth rates within the CCIs, at 5.2%.

South Africa generates some US$600-750 million in production value annually, of which some US$220 million is Foreign Direct Investment, mostly coming from foreign film production which delivers a multiplier of 5 for the DTIC’s investment. The industry’s overall economic multiplier is 2.8, higher than tourism at 2.3, and the employment multiplier is 4.1. The sector creates around 60,000 full time equivalent and freelance jobs, with indirect jobs created throughout the value chain including suppliers and service providers estimated to be well over 100,000.
67% of industry workers are below the age of 35. According to the NFVF 2017 Economic Impact Study, the databases of the NFVF, KZN Film Commission and DTIC comprised 600 production companies, however this figure is known to be much higher as many companies – especially those involved in broadcast production – would not acquire funding from these sources.

**FILM**

South Africa’s film industry is as old as Hollywood’s. It was one of the few countries in the world to see and hear sound motion pictures as early as 1895 when Kinetoscopes opened in Johannesburg, then a small town only nine years old. In 1898, the city’s Empire Palace of Varieties adopted film as a permanent part of its programme. Three days after the start of the Anglo-Boer War in 1899, W.K.L Dickson (who had perfected the motion picture and worked for Edison) came to the country to record the war on film – discovering and exploiting the value of film as a new medium for propaganda. South Africa’s first feature film, *The Kimberley Diamond Robbery*, was shot in 1910 and 1911/12 saw the establishment of Africa’s Amalgamated Theatres and the Empire Theatres Company (SA) Ltd respectively. Africa’s first newsreel, *African Mirror*, first screened on 5 May 1913.

Isidore Schlesinger established Africa’s first motion picture studio and between 1916 and 1922 went on to make forty-three films. *African Mirror* got sound just in time for the start of World War II, which accelerated Afrikaner nationalism and saw the establishment of the Reddingsdaadbond Amateur Rolprent Organisasie in 1940 to produce ‘culturally-specific’ Afrikaans films. This set the tone for the industry’s domination by Afrikaans nationalistic films until the end of apartheid in 1994.

In 1942 the South African National Film Board was established and in 1948 the country received its first Oscar nomination when Cecil Kellaway was nominated for an Academy Award for Best Supporting Actor. In 1956 a subsidy that rewarded box office success was introduced, with many of the films produced being based on popular radio programmes.

In 1963 the Publications Control Board (Censorship Board) was established. The same year saw the first local film directed by a woman, Truida Pohl, being released. In 1964, the film *Zulu* was a worldwide success but was banned at home for screening to Black people. Also in trouble with the Censors that year was Elmo de Witt’s *Groen Koering* for portraying an Afrikaans girl who gets pregnant out of wedlock. And so censorship continued to stifle the industry. The first local film produced by a Black person, Simon Sabela, was released in 1974.

The late 80s, however, saw a blossoming of the film industry with many films daring to be critical of Apartheid, such as the *Road to Mecca* (1991), *Die Storie van Klara Viljee* (1992), *The Fourth Reich* (1990), *Place of Weeping* (1986) (produced by Anant Singh and which became a landmark film for the anti-apartheid movement,) and many others.
Few South Africans saw them as cinemas wouldn’t screen them for fear of trouble with the law. The most popular local films at the box office were, and still are, made by Leon Schuster – slapstick comedies that poke fun at South Africans and local issues.

The arrival of democracy heralded a new era for South African film and TV content, no longer constrained by apartheid censorship issues and with the cultural boycott lifted. The local industry proved its worth with films like the Oscar-winners Tsotsi in 2005 and My Octopus Teacher in 2021, the 2005 Berlin Golden Bear-winning U-Carmen eKhayelitsha, the Oscar-nominated Yesterday in 2004 and the celebrated Drum of 2004. The ground-breaking, highly acclaimed co-production with New Zealand and the US, District 9 (2009), co-written and directed by South African Neil Blomkamp, earned South African actor Sharlto Copley a Best Actor nomination in the Oscars. South African actors, such as South Africa’s official entries, have included Sunnyside, The Avenger, Breathing Elephants, and the multiple Oscar-nominated Mad Max – Fury Road (some of which was shot also in Namibia).

South Africa is currently facing stiff competition from other countries which are increasing the attractiveness of their incentives for foreign studios to shoot on their shores, taking the FDI and jobs with them.

Although the documentary community in South Africa is a smaller subsection of the film and audiovisual sector, it has been represented by the Documentary Filmmakers Association since 2006 and is a popular entry point for emerging filmmakers to create their first content. The golden era of documentary was in the 1990’s with documentary strands commissioned from SABC and later e.tv, with themes focusing on history and the evolution of a new South African identity and culture. Films often employed the voice of God approach, although an observational filmmaking style has become more influential in recent years.

Pre-eminent documentary filmmakers include Rehad Desai, Nadine Cloete, Sara C. F. De Gouveia, Lawrence Dworkin, Don Edkins, Craig Foster, Kevin Harris, Mark Kaplan, Sifiso Khanyile, Vincent Moloi, Miki Redelinghuys, Lloyd Ross, Enver Samuel, Aliki Saragas-Georgiou, Shameela Seedat, Karin Slater, Khalid Shamis, and Francois Verster. The film collective STEPS has done substantive work in sharing Southern African stories with an international audience through their series Steps for the Future (2001), Why Democracy (2007), Why Poverty (2012) and Generation Africa (2021). The Encounters South African International Documentary Festival has been a cornerstone of celebrating factual films since 1999 and the Durban International Film Festival’s Best SA Documentary winners qualify for consideration for the Academy Award.
ANIMATION

The first South African animation television series based on African folktales was *The Magic Cellar* which was developed in collaboration with Canadian studio Chocolate Moose Media and animated in India in 2006 and for public broadcaster SABC, airing in English, Afrikaans, Sotho and Zulu. The first fully homegrown animation television series was the 2D *URBO: The Adventures of Pax Afrika* (104 x half hour, 2006-2009) created by Sean Rogers and produced by Octagon CSI later known as Clockwork Zoo.

The studio was the largest and fastest producing studio in Africa at the time but the 2008 recession and a downturn in preschool animated content buying which the studio specialised in, lead to the closure of the company in 2010. Since then, smaller 2D studios have grown such as Bubblegum, Mind’s Eye Collective, Luma, Sea Monster and Strika.

In the 3D space the two most significant players have dominated the animation industry: Sunrise Productions and Triggerfish Animation. Sunrise who have produced eight seasons of the dialogue-free preschool shorts series *Jungle Beat* (2003+) which airs in 200-plus territories worldwide, the 2016 spin-off series *Munki and Trunk* for Nickelodeon and are also active in animated branding. Since their founding in 2003 and creating Africa’s first animated feature film, the stop-motion *The Legend of the Sky Kingdom* which employed “junkmation”, using puppets built from recycled materials and filmed on a motion camera rig, the studio has transitioned to 3D computer generated animation and their growth culminated in 2020 with the release of the digital-first global rollout of *Jungle Beat: The Movie* and the establishment of a satellite studio in Mauritius called Sandcastle Studios.

Founded in 1996, Triggerfish Animation has gained international success with their stereoscopic feature films *Adventures in Zambezia* (2012), *Khumba* (2013) and *Seal Team* (in production). Whilst working on their own properties, the studio has also diversified into service animation with UK partner Magic Light Pictures on the annual BBC short film that are broadcast on Christmas morning, including adaptations of children’s books *Stickman* (Cristal for best TV production at the Annecy International Animation Festival in 2016), *Revolting Rhymes* (nominated for the Best Animated Short Film Oscar at the 2018 Academy Awards), *The Highway Rat*, *Zog* (International Emmy for Best Kids Animation in 2020) and *The Snail and the Whale* (2019). Triggerfish have also become the leaders of an African boom in animation with *Mama K’s Team 4 for Netflix* (2019) and in 2021 greenlit the series *Kiya* in collaboration with eOne Entertainment in Canada.

Both *Mama K* and *Kiya* were the result of a story development lab initiative in 2015 called Storylab that aimed to develop African writers and directors with the support of the Walt Disney Company. Triggerfish opened a satellite studio in Galway, Ireland in 2020.

The South African animation industry is supported by the non-profit representative body Animation South Africa which seeks to nurture a “vibrant, sustainable and transformed industry” and showcases its achievements and opportunities at the annual Cape Town International Animation Festival.
The South African gaming and animation sector currently creates 1,225 direct jobs, of which 457 are in the gaming sector, and there is considerable overlap between gaming and animation with 46% of companies producing games also doing animation work. Through an online survey, the research study identified 54 gaming or gaming and animation companies in South Africa, with almost half clustered in the Western Cape, with an estimated turnover in the 2017/8 financial year of US$35.45 million, of which US$14.7 million was attributed to gaming and hybrid companies. This is a rapid growth from the 2016 survey by Interactive Entertainment which quantified the income derived by South African Gaming Industry as US$2.21 million in 2014 and US$7.45 million in 2016. Furthermore, it was noted that the majority of the companies surveyed were established after 2008, indicating the rapid growth in the sector.

TELEVISION AND VOD

The late introduction of TV to the country in 1976 saw the start of local content production for broadcast. The continent’s first pay TV operator, M-Net, launched in 1986 screening mostly foreign (US) content with only one local soapie, Egoli, and a multi award-winning weekly investigative series, Carte Blanche, launched in 1988 and still running today. As part of the MultiChoice Group, it has since gone on to become one of the largest commissioners and licensors of local content.

MultiChoice reported spending US$409.72 billion (R5.5 billion) on local content in the 2018/19 financial year, which included commissioning new works, as well as acquiring licencing for existing works. The spending accounted for 600 hours of local content, which makes up 40% of their spending on entertainment content. During 2019, MultiChoice produced 28 local dramas, 13 telenovelas and 17 comedy series. Amongst their most popular shows were the multiple award-winning and International Emmy-nominated telenovela, The River, the crime drama series, Trackers, which was M-Net’s first co-production with Cinemax and ZDF, its Afrikaans hospital drama soapie, Binnelanders, and its Afrikaans comedy mockumentary, Hotel. MultiChoice is reputed to be the biggest investor of local content in Africa. A new proposal from MultiChoice is that films be released “Straight to Box Office” which is the DSTV pay-per-view online streaming service. This addresses the growing market for on-demand content, rather than cinema releases.
The SABC reports that it spends 15% of its budget on local content as compared to M-Net’s 43% local content spend. The public broadcaster reduced not only the proportion of its budget devoted to the local content, but also the fees paid to producers and freelancers, effectively cutting its rates in real terms by 40% between 2009 and 2021. According to its 2019/20 financial statement, it spent US$94.6 million on content (including sport), down from US$130.36 million the previous year, dealing a further blow to independent producers. Fortunately, some of that has been cushioned by increased commissions from other players such as etv, Netflix, Showmax, Viacom, StarSat and local Telcos, with numerous high-end series commissioned now reaching global audiences to much acclaim. This is set to increase with the DCTD’s aim to introduce local content quotas on these platforms.

More recently, VOD platforms have become an important source of demand for South African content. For example, Netflix (which is also available on the DStv platform) premiered its first African original production, Queen Sono, in February 2020. The creator (Kagiso Lediga), director (Tebogo Malope) and star actor (Pearl Thusi) are all Black South Africans, which is a positive indication of the film industry transformation. Other South African Netflix original series include Blood and Water (2020), and Jiva! (2021). The feature documentary My Octopus Teacher was recognised with the Academy Award for Best documentary feature in 2021. The platform has also become a viable alternative for the release of feature films instead of cinema releases, such as Seriously Single (2020), How to Ruin Christmas (2020), or I Am All Girls (2020). Although relatively small in South Africa (with an estimated 324,000 subscribers in 2019), Netflix does represent a large and rapidly growing international market for South African content.

VIU is also entering into co-production deals with local producers such as the Anglo-African adaptation of the global hit Ugly Betty, called uBettsinu Wethu, as an original VIU production streamed first on VIU and rebroadcast on SABC1. It features the world’s first Black Ugly Betty, played by Farieda Metsileng.

Finally, Showmax’s investment in original local high-end TV content is a welcome boost for the local industry. Some of their productions include The Girl from St Agnes (2019), Tail’s Baby Diary (2021), Dam (2021) and The Real Housewives of Durban (2021), which broke Showmax’s first-day viewing record at the end of January 2021 and remained the most popular series on the platform until its final episode in April 2021.

COMMERCIALS AND MUSIC VIDEOS

South Africa has a very robust television commercial production sector. The industry incorporates about 80 production companies, hundreds of suppliers and approximately 7,000 skilled and talented individuals to meet the demand for advertising content. Johannesburg is the centre of year-round production in the local market as most major clients and advertising agencies are based there and produce commercials for broadcast in South Africa and the African continent. The industry is well established and respected due to its long history and innovative and creative approach. Cape Town attracts many international clients who come mainly from Europe and North America, mostly during the summer months, to take advantage of the region’s unique offering and excellent value for money. Over the last 30 years, Cape Town has become well known as one of the world’s premier film production centres.

The commercial sector has an annual turnover of a minimum of US$149 million. Of this, approximately 50% is as a result of foreign direct investment whereas the remaining 50% is generated through the local economy. The multiplier for commercials is 2.75 which is the highest in the South African film industry. An estimated 8,000 people visit South Africa each year to work on the production of international commercials and, as a result, the industry is closely aligned to tourism.

The music video production sector has seen a consistent increase in the number of production over recent years, particularly in the independent arena of artists who are not attached to labels, which is difficult to quantify. For the major labels some 150 to 200 music videos are produced annually, with production costs reduced significantly due to new technologies now ranging from US$1 500 to US$11 200. Generally, the core team on a video, including the band/artist but excluding for example dancers and other performers, comprises 8 to 12 people, many of whom work on multiple productions a year. The country’s leading music awards, the South African Music Awards (SAMAs) offers the much-coveted ‘Music Video of the Year Award’ which has encouraged artists and producers to enhance the production value of their entries. Royalties paid for the flighting of music videos on the country’s leading TV broadcast channels was US$1,103 million for the period September 2019 to August 2020.

DISTRIBUTION, EXHIBITION AND BROADCAST

It is estimated that the number of people employed directly and in film and TV distribution/exhibition/broadcast in South Africa is over 10,000, with the three broadcasters making up the lion’s share at over 8,000 people. This is supported by freelance and indirectly employed people, for which a figure is presently not available. Several of these companies, however, have steadily reduced headcounts due to the impact of Covid-19 and the need to streamline costs and efficiencies.
DISTRIBUTION COMPANIES

A number of local and international distribution companies are active in South Africa. Disney has its own office in the country, distributing its own content and merchandise to retail, whereas UPi's local office is run out of the US. Filmfinity is a local operator, formerly Ster-Kinekor Distribution, which has the license for Sony International Pictures and buys independent films from markets for local distribution as well as releasing some local productions. It also makes available content from Nolava International Film Distributors. Empire Entertainment, formerly NuMetro Distribution, holds the license for Warner and MGM and also buy independent films to distribute locally. Black Sheep Distribution holds no studio license but buys mainly international ‘family content’ for local release. AAA is a South African distributor and sales agent focusing on international sales of local content and occasionally acquiring foreign films for local distribution.

Gravel Road Distribution Group is an entertainment company focusing on sales and distribution of quality filmed content across all market channels, in all territories. It offers a consultancy to help aspiring and seasoned professionals and has built a fastgrowing network of branded Afrocentric VOD channels for consumption via mobile and OTT services across the continent.

Indigenous Film Development and Distribution, the country’s leading local distributor, works with producers from development to distribution, including helping producers secure funding. Their focus is on local content (South African and African), distributing locally, continentally and internationally. Some local distributors focus specifically on broadcast, including AfricaXP – a relatively new content distributor and linear creator packaging custom-made channels for African audiences mainly for DStv and Arena Broadcasting, which aggregates content for Ignite, and Summit channels on DStv.

CINEMA EXHIBITION

With several closures of cinemas due to the pandemic, South Africa now would have 663 cinema screens across over 90 sites. Ster-Kinekor, the largest chain, has 412 screens of which 14 are dedicated art house cinemas under the brand ‘Cinema Nouveau’. It also has cinemas in Namibia, Zambia and Zimbabwe. The second largest is NuMetro, with 21 cineplexes and 157 screens in South Africa, and a further eight screens elsewhere in Africa. Independents include the The Avalon Group with four sites and 26 screens; hotel and entertainment group, Tsogo Sun, with its brand ‘movies@’ which has seven sites and 41 screens, two art-house cinemas, The Labia Cinema and The Bioskope have five screens combined with a further 22 screens across other independent cinemas.

Hollywood continues to dominate the exploitation of cinema, in contrast with television, where local content attracts the highest audiences and drives broadcaster advertising revenues. However, South African films meaningfully improved their box office performance from 12% in 2018 to 18% in 2019, when they recorded US$4.44 million at the box office, 5% of total box office revenue. This despite the number of films on the circuit reducing from 28 in 2016 to 22 in 2019. Nine of the films released were English language, while eight were in Afrikaans. Other indigenous language films did not perform well at the box office.

BROADCAST

South Africa is the biggest TV market in Africa in terms of revenues. TV sets penetration reached 84% in 2019. A little over half of the homes receive pay TV services and this figure has been increasing over the years. South Africa’s phased switch off from analogue television to migrate to digital terrestrial TV commenced in March 2021 and is expected to be completed nationally by end of March 2022.

Television only came to South Africa in 1976, with the launch of the public broadcaster, the South African Broadcasting Corporation (SABC), which offers three free-to-air channels (which are also carried on the DStv platform) and, more recently, two channels – SABC ENCORE and the SABC News Channel only available on DStv. The company has just approved an OTT streaming strategy to leverage online and mobile platforms to expand access to their content and services.

Ten years later, Africa’s first pay TV operator and South Africa’s first independent TV channel, M-Net, was born to massive take-up by South Africa’s middle class, with a mix of Hollywood movies, soaps, children’s programming, sport and more movies. Subscribers require a decoder to access its (initially analogue, now digital) signal, and management of decoders, subscriptions and customer queries are dealt with by the holding company, MultiChoice. Notably, M-Net’s license prohibited it from operating any news services.

In 1996, MultiChoice introduced digital satellite broadcasting with the launch of DStv, which carried an increasingly extensive range of content channels including an array of local and international 24-hour news channels. With the advent of DStv, the group embarked on an expansion programme across Africa and the Middle East, with offerings also in Sweden, Greece and the US. Today, MultiChoice South Africa boasts 8.7 million subscribers (they estimate 2.4 viewers per subscriber) and 158 local and international channels, as well as Showmax, Netflix and its own video on demand service, Box Office, for connected subscribers.

In a hotly-contested bid, Midi TV (now eMedia) won the broadcasting licence in 1998 to operate the country’s first free-to-air independent TV channel, eTv which today broadcasts to over 80% of the population, over 15.2 million people (AMPS 2011), and is also available online.
The group’s subsidiary companies include eNCA, a 24-hour news channels on DStv, which also offers an Afrikaans version (eNUUS), and English and Zulu news on their Openview HD platform. Openview is a free DTH satellite television platform company with 16 TV channels and an on demand service. Open News is available exclusively on the Openview platform through a mobile app and satellite.51

A recent development is the groundbreaking deal between the SABC and Openview which will see the SABC supplying Openview with six TV channels – SABC 1, 2 and 3 and three new channels, enhancing Openview’s strength in the direct-to-home satellite space while enabling the SABC to enter the free-to-air satellite market.52 Despite the increasing ability to view TV content on a variety of devices, of the 38.7 million daily adult TV viewers, 99% still view it on TV.53

International network Viacom/CBS also has a base in South Africa, with DStv carrying several of their channels including M-TV, Comedy Central, BET and Nickelodeon. They commenced co-producing local content with South African producers during 2021. It is anticipated that Disney will launch in the country in 2022 or later, though many Disney fans have already found ways to access its Disney+ service in the country.54

DIGITAL PLATFORMS

The astronomical rise of Over-The-Top (OTT) content, Internet Protocol Television (IPTV) and Video On Demand (VOD) services has already wrought major changes throughout the film and television industries in South Africa, with all signs pointing to even greater innovation on its way in the coming years. Video on demand had a slow start in the country, not least of all because of the country’s high data costs, but as South Africans discovered the appeal of massive content libraries, ease of access across all devices, and the lack of interruptions for advertisements, its use has grown exponentially.

Netflix entered the country in 2016 as did Amazon Prime Video, while Netflix’s biggest competitor, Showmax (owned by MultiChoice), had launched the year prior. Black TV by mobile network operator Cell C launched in 201755 with competitor mobile operator Vodacom launching Video Play. These are ranked the Top Five streaming services in the country.56 Apple’s iTunes allows users to buy and download music, movies and podcasts. OTT video service, Viu offers both free and paid-for content and has partnerships with e-tv, SABC and Vodacom.57

Mobile television, first trialed in the country with DStv Mobile in 2010, is claimed to be one of the fastest growing media markets in South Africa. Its emergence has severely disrupted the traditional broadcast model. Now, although users may be restricted by bandwidth or data limitations, they can view content on demand, either by streaming it or by downloading to watch when they want.58

While the digital revolution may represent a threat to traditional broadcasters, everybody benefits from more eyes watching more video content on more screens. For creators and producers, there are more opportunities and a growing market demand for video content. For consumers, the power to choose is increasingly in their hands – there are now many more options for consuming video content. For the industry in general, the use and consumption of video is exploding, and this will drive growth.59
PUBLIC FUNDING

Public funding through various national and regional government departments supports the film and television industry in South Africa. Agencies as part of the "Mzansi’s Golden Economy" initiative have intended to boost job creation and stimulate small business since 2013. The South African Cultural Observatory’s research shows that in 2018 Audiovisual and Interactive Media made up 11% of the GDP contribution, including cinema and television, podcasts and video gaming products. Public funding through rebates, grants and tax incentives are critical levers supporting this sector and enabling the economy to recover from the damage of Covid-19.

A National Film and Video Foundation (NFVF) Economic Impact Assessment study quantifying the economic impact of the film and television industry between January 2013 to March 2017 identified the main public funding institutions as the NFVF itself, the Department of Trade and Industry and Competition (DTIC), as well as the development bank Industrial Development Corporation (IDC), with 32.8% of support coming from the government sector and 40.3% from individual private funding.

The National Film and Video Foundation (NFVF)

The Department of Sport, Arts & Culture offers leadership in relation to cultural industries and issues of social cohesion, identity, local language promotion and provincial/local sense of place and representation. The National Film and Video Foundation (NFVF) is an agency of the DSAC and supports projects for development, production (includes post-production), archive, distribution and marketing. The NFVF have identified three groups of beneficiaries for their grants:

- Tier 1 - Experienced filmmakers who have a proven track record for developing and producing theatrically released feature films;
- Tier 2 - Filmmakers with limited experience but who have developed and produced a theatrical feature films, television fiction, documentary, short films and/or commercials, now seeking to venture into feature film development and production; and
- Tier 3 - New entrants into the industry, particularly recent film school graduates from historically disadvantaged backgrounds.

The Department of Trade, Industry and Competition (DTIC)

The Department of Trade, Industry and Competition (DTIC) is the lead agency in relation to industrial development and incentives. The Department of Trade and Industry has offered a bouquet of film incentives since 2008 which provide a rebate to qualifying producers.

The Foreign Film and Television Production and Post-Production Incentive (Foreign Film) is intended to encourage and attract large-budget films and television productions and post-production work that will contribute towards employment creation, enhancement of international profile, and increase the country’s creative and technical skills base.

The PostProduction Incentive seeks to encourage producers to make use of South African editing, final mix, grading and visual effects suppliers by increasing the incentive payout on a sliding scale, dependent on the overall post-production spend.

The 2019/2020 report from the DTIC indicates that 83 new projects were accepted with an approval amount of US$82 million to be used for various film and TV productions. The Covid-19 pandemic had an adverse effect on foreign productions using South African to film and many producers have instead explored creation of local content that could be distributed internationally.

The SA Film & TV Production and Co-production (SA Film) provides a tax-free grant for productions when a South African producer has an official co-production with one or more international partners, where a production is first certified as an official co-production by the NFVF. The South African Film and Television Production incentive similarly intends to create employment opportunities and support the local film industry with the proviso that the production’s intellectual property is majority owned by South Africans. In 2019/2020, seven co-productions were approved for US$3,6 million with a local spend of US$9,1 million enabling collaborations and skills transfers between foreign and local productions.

The South African Emerging Black Filmmakers Incentive (SA Emerging Black Film) seeks to capacitate emerging Black filmmakers to take up big productions and contribute towards employment opportunities. This rebate not only incentives qualifying production expenditure but allows beneficiaries to apply for a once-off costsharing incentive for the purchase of equipment and software. This incentive has been implemented since 2014 to nurture and capacitate emerging Black filmmakers to take up big-budget productions.

The DTIC also oversees the National Empowerment Fund (NEF) which seeks to advance sustainable black economic participation in the economy and the Black Industrialists Scheme since November 2015, which supports infrastructure investment, as opposed to support for productions.
commercially viable. Films, animation and TV series that are rebated, with an emphasis on feature as an equity partner and cash flow the allowances to attend international exhibition fees, subsistence and travel (EMIA) scheme offers funding for Marketing and Investment Assistance Trade, Industry and Competition’s Export Market (Italy), which are notably also Biennale Cinema Venice Gap-Financing Festival Rotterdam (Netherlands), the Hubert Bals Fund of International Film Berlinale World Cinema Fund (Germany), and the main sources of funding are the IDFA Bertha Fund (Netherlands), Hot Docs Blue Ice (Canada), Chicken and Egg (USA) and the AlterCine Foundation (Canada) with most documentary projects relying more heavily on public grants and own investment by the producer.

PRIVATE FUNDING

Many production companies will fund concept development themselves and use partially developed concepts to attract funding from sources such as the IDC, NFVF and private investors. Financiers may include commissions and licence agreements from local broadcasters such as the SABC and etv or pay television operators such as MultiChoice, upfront private equity investments from film distributors and angel investors, brand sponsorships and bank loans as well as own investment by the producer of a project. Funding is mostly available further down the value chain during production and postproduction with development being self-funded. The SA Cultural Observatory notes that a protracted period of financial challenge at the SABC has slowed projects moving forward and that acquisition rates are very low.78

A 2017 NFVF study of the economic impact of the film industry notes that bank loans, private investments and angel investors are the least used due to the high risk involved and that this gap funding is the smallest contributor at 8.5% of income. As many upcoming filmmakers do not have credit worthiness ratings or developed business plans, the study further notes that access to private funding from banks and investors is very difficult to secure. While it is a much lower contributor than public funding, private funding increased from 7.5 million to US$101 million from 2013 to 2017, while data relating to the period 2018 to 2020 is not yet available.

PROMOTION

South Africa hosts a number of film festivals, the oldest and largest of which is the Durban International Film Festival, which is aligned to and hosted concurrently with the Durban FilmMart, attracting thousands of local film fans, producers, distributors and international industry representatives annually. Other festivals include the Encounters Documentary Festival, Wavescapes showcasing surfing movies, the Jozi Film Fest and Rapid Lion Festival (both in Johannesburg), Out In Africa Gay and Lesbian Film Festival, the TriContinental Human Rights Film Festival, Cape Winelands Film Festival, 48 Hour Film Project, Wild Talk Africa, Silwerskermfees which showcases primarily Afrikaans productions, and some smaller regional festivals, which often fall within broader arts festivals such as the Grahamstown National Arts Festival.79 Many of these festivals incorporate outreach and training programmes, to excite marginalised communities about the world of film.

While attendance figures are not available for all the festivals, audiences were growing steadily until the advent of Covid-19. Most of these festivals include award ceremonies, however the country’s major industry awards are the South African Film & TV Awards (SAFTAs), followed by the Rapid Lion Awards and the KwaZulu-Natal Simon Sabela Awards.

Since 2000, the South African film industry has consistently participated in major film festivals around the world and has had an official presence at the Cannes Film Festival since 1997, raising the international profile of South African film and television content and by implication the industry as a whole. The NFVF provides funding to filmmakers to attend screenings of their work at selected international festivals and events and to attend international markets where they can pitch their projects and gain financing to advance their projects.80
Festivals at which South African and its content are regularly featured include Cannes (France), Hot Docs (Canada), Annecy International Animation Festival (France), AFCI location expo (LA), Toronto International Film Festival (Canada), IFP No Borders (New York) and the Pan African Film Festival (LA) as well as Sundance (US), IDFA (Rotterdam), MIPCOM and MIPTV (Cannes) and others where South African films have been accepted into festival. South Africa also features strongly at African festivals – DISCOP, Fespaco (Burkina Faso) and Zanzibar International Film Festival amongst others.

EDUCATION AND TRAINING

PUBLIC INSTITUTIONS

The Department of Higher Education and Training (DHET) oversees training in the area of film and television with a 2020 survey by SACIA noting that there are 27 public universities and private educational institutions that offer formal qualifications accredited through the South African Qualifications Authority (SAQA) which oversees the National Qualifications Framework. Notable institutions include Durban Institute of Technology, University of Cape Town Film and Media Studies, University of Johannesburg Journalism School and Rhodes University Journalism and Media Studies.

Public funding for skills transfer is available through the Media, Information and Communication Technologies Sector Education and Training Authority (MICT SETA) to companies who are eligible to receive funding as a rebate on their skills levy paid over to the SA Revenue Service. However, employers have to submit a Workplace Skills Plan and an Annual Training Report, and only companies with a wage bill of more than US$34,836 annually are eligible. Discretionary grants are paid out at the discretion of SETA management for skills development projects linked to scarce and critical skills. Skills audits show that there are high financial barriers to entry to training institutions. Scarce job areas in the value-chain identified by the 2021 Creative Masterplan include:

- **Preproduction:** Script Editors, Script Supervisors and Continuity Experts, Line Producers
- **Production:** Technicians in on set departments, Drone Camera Operators, Covid-19 Compliance Officers and Medical Staffing, Production Accountants,
- **Post-production:** Data Wranglers and Digital Image Technicians (DIT), Editors, Post-Production Supervisors, Colourists / Grade Artists, Animation professionals at mid-career and senior level, Visual Effects Specialists and IT for Animation Programmers and Developers such as Render Farm Engineers and System Administrators, Broadcast Engineers

Skills gaps that were highlighted as needing further development and investment include directorial skills, creative development of content through script writing and creative content, business and entrepreneurial skills, human resource management, intellectual property management and legal knowledge as well as marketing, sales and distribution knowledge.

PRIVATE INITIATIVES

There is no shortage of training providers as there are an additional 50 registered bodies that offer some qualification and the Media and ICT SETA have 150 other short courses and diploma courses. The most respected institutions producing well-qualified graduates include The Animation School, Academy of Sound Engineering, AFDA - the South African School of Motion Picture Medium and Live Performance, Boston Media House, City Varsity, FILM Mentorship & Training, Limpopo Television and Film School, NEMISA, the Multichoice Talent Factory and the Realness Institute’s script development programme.
**SOUTH SUDAN**

Population: **13.8 million**
GDP per capita: **US$ 1,119**
Median age: **19 years**
Urban population: **19.9%**
Rural population with access to electricity: **23.7%**
Mobile phone subscription: **33.5%**
Internet users: **8%**
Female upper secondary education completion rate: **39%**


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

**INSTITUTIONAL FRAMEWORK**

**MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS**

The film and audiovisual sector falls under the Ministry of Culture, Museums and National Heritage. South Sudan does not have a Film Commission, however, filmmakers are required to seek permission from the Media Authority prior to shooting. Filmmakers are still struggling to establish their union through the help of the Ministry.

The broadcast sector is under the Ministry of Information, Communication, Technology and Postal Services and is regulated by the South Sudan Media Authority.

**FILM AND AUDIOVISUAL POLICY**

South Sudan does not have a film or audiovisual policy or bill. A 2021 draft National Culture Policy – which will be crafted in partnership with UNESCO and reflect the government’s commitment to harness the potential of the cultural sector for sustainable development – is yet to be finalised and passed by the Parliament.

**COPYRIGHT PROTECTION AND PIRACY**

Practitioners estimate that at least 75% of revenue generated by the film and audiovisual sector is lost to piracy every year. Since 2011, South Sudan does not have a Copyright law to protect filmmakers, musicians or writers' intellectual property. Many of them publish their works in neighboring countries.

In 2019, a project aimed at creating legal frameworks for cultural and creative industries in South Sudan was launched in Juba. Over 80 stakeholders from the creative industries including the then Ministry of Culture, Youth and Sports, other ministries representatives, the European Union, civil society organizations, NGOs, media and universities participated. With funding from EU to UNESCO, the project was to help the Ministry design a copyright bill for the creative industries in South Sudan which could protect and promote artistic works of South Sudanese artists and creators.

When it comes to television, under the 2013 South Sudan Media Authority Act, broadcasters may only carry programmes that they produce or for which they hold broadcasting rights, and copyright should be clearly indicated as part of the credit displayed with each broadcast programme. However, South Sudan is missing the resources to implement or enforce such measures.

**PRODUCTION**

Despite severe limitations, South Sudan produces about 60 films every year, and some 40 people are directly and 250 indirectly employed in the audiovisual sector.

**FILM**

Foreign crews periodically come to South Sudan to shoot news or documentaries with key crews and equipment need to be brought in from abroad. Without any proper training and no access to equipment, local filmmakers find it extremely difficult to get started. They also list insecurity as a major challenge.

With limited local films production, foreign films from Nollywood, Hollywood and China dominate the market. In 2011, a collective of young creatives called Woyee Film and Theatre Industry produced *Jamila*, South Sudan’s first feature film. The members of the collective had met a decade earlier in Kenyan and continued working together. Woyee has also produced a number of short films.

Besides collectives such as Woyee, there are no film production companies in South Sudan.

In 2016, Simon Bingo founded the Juba Film Festival, with the goal of changing the image of South Sudan to be a country on reconstruction. The festival puts the spotlight on local short films like Robert Oliver’s *Sorrow* (2016). Other short films, such as *Wajah ta Jena part 1 and part 2* (2018) by Leviticus, *Wrong Decision* (2019) by Patrick Nyarsuk, Akim Pelimo’s *Dunia* (2019) and *Parent’s Responsibility* (2019) by Juba Day Students, have also gained local attention. Another locally supported film festival initiative offered by Horn Film Festival for filmmakers to contest with their short films organised by New Media Company in Juba.
TELEVISION AND VIDEO

A few content producers are periodically engaged by NGOs to take photos or make short documentaries, or by private individuals to shoot weddings or music videos. However, their low income does not allow them to register their business.

The state-run broadcaster SSBC does not pay for local content, and producers who want to have their programmes shown on the air must make them available for free.

DISTRIBUTION, EXHIBITION AND BROADCAST

CINEMA EXHIBITION

Juba’s only cinema was destroyed during the second civil war.

Since 2016, South Sudan has not had a single movie theatre. The old movie palace in Juba’s cinema district was renovated into a Church after years of being inoperable. The Nyakuron Cultural Centre, a government-owned cinema and cultural hub opened in 1976, is the only entertainment centre where the youth and filmmakers can converge in large numbers for performances.

In 2008, the government leased out Nyakuron Cultural Centre to a company. There are other ruined cinema houses in Malakal and Wau. The French Cultural Center at the University of Juba also offered a wide screen for filmmakers to show their films and exhibitions.

BROADCAST

Economic challenges and high operational costs due to the lack of electricity and telecommunication infrastructures have greatly limited the growth and development of television in South Sudan.

In 2019, the penetration of TV sets among households was very low, hardly reaching 4%. The channel reception consists essentially of free-to-air (FTA) channels, usually distributed through direct-to-home satellite (DTH).

The public broadcaster is the South Sudan Broadcasting Corporation (SSBC), previously known as South Sudan television (SSTV). SSBC broadcast news and current affairs programming, music and entertainment. Between 2012 and 2016, private TV stations such as Citizen TV and the Equatoria Broadcasting Cooperation operated sporadically, but were eventually switched off. In 2018, two new private TV stations, Junubna and Africa 360, were established to target younger audiences, but are not yet fully operational. International channels are also available through pay TV providers such as DStv. SSBC remains the most popular station with 47% of the small South Sudanese TV market, followed by Al Jazeera Arabic (35%) and Al Jazeera English (28%). Recently, a new South Sudanese TV cable has been launched and has a film channel which televeis South Sudanese films produced in the country.
DIGITAL PLATFORMS

In South Sudan, mobile penetration reached 19% of the population in 2019. The market was for a while split between four operators - MTN, Zain, Gemtel and Vivacel - until Gemtel and Vivacel shut down operations. In 2019, 14% of mobile subscribers had access to the internet via their mobile, partially compensating the low penetration of fixed broadband services. An exceedingly small number of people subscribe to VOD streaming services available in the country, such as Showmax. A new mobile company called “Digitel” has also been launched in 2021.

FUNDING SOURCES AND MECHANISMS

The film and audiovisual sector in South Sudan is at an embryonic stage. In the absence of any kind of funding, budding filmmakers in South Sudan are typically left to use their own resources. Any production is made possible by individuals coming together and pooling their own income to cover equipment and locations rentals. Although not directly funding film, international organisations and NGOs like the UN Development Programme and FilmAid International have engaged a few South Sudanese creatives in community awareness programmes, which have allowed groups like the Woyee Film and Theatre Industry to develop some skills. UNESCO Juba office invested in capacity building to train CCI practitioners on how to apply for IFCD funding though South Sudan. A few embassies in South Sudan also supported with cash envelops and in-kind annual Juba Film Festival.

PROMOTION

The Juba Film Festival was established in 2016 by South Sudanese filmmaker Simon Bingo. For its 4th edition, which was held in 2019 over nine different venues in residential areas including the Nyakuron Cultural Centre, the festival attracted some 22,000 attendees. Initially planned in 2019, the Pangea Under The Stars (formerly Juba Under The Stars Festival), which aims to bring the cinema experience to South Sudan, is set to hold its first edition in October 2021.

EDUCATION AND TRAINING

There are no existing films and audiovisual training schools in South Sudan. Most filmmakers get limited training through short courses or workshops organised by local and international NGOs, for example during the Juba Film Festival.

NOTES

1. South Sudan NGO Forum: Laws of South Sudan. https://docs.southsudanngoforum.org/sites/default/files/2017-09/Media Authority Act 2013.pdf
4. South Sudan NGO Forum: Media Authority Act 2013 https://docs.southsudanngoforum.org/sites/default/files/2017-09/Media Authority Act 2013.pdf
9. https://medialandscapes.org/country/south-sudan/media/television
SUDAN

Population: 55.3 million
GDP per capita: US$ 3,958
Median age: 19.7 years
Urban population: 34.9%
Rural population with access to electricity: 47.1%
Mobile phone subscription: 72%
Internet users: 30.9%
Female upper secondary education completion rate: 28%

This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

In Sudan, the Ministry of Culture, Tourism and Antiquities (MoCTA) is in charge of cultural preservation and film industry regulation. It coordinates with the National Corporation for Antiquities and Museums (NCAM), and the Sudanese National Commission for Education, Science and Culture (NatCom) to develop the Sudanese Culture sector. Meanwhile, the State Cinema Authority, which replaced the Sudanese Film Unit, was a State-run service that produced films about major events, such as presidential visits and significant State projects. It was dissolved in 1990.

Established in 1989, the Sudan Film Group (SFG), a non-profit organisation that works to promote development in the local film industry is composed of professionals involved in filmmaking, artistic production and development communication. The SFG produces films, organises shows, trainings and workshops and also screens films in outdated cinemas. The Sudanese Film Making Association develops, trains, equips and motivates filmmakers to produce films and also develops and promotes the film industry.

In the broadcast sector, the Ministry of Information and Communications is in charge of creating and monitoring policies and regulations relating to the telecommunication industry. The National Telecom Corporation (NCT) is the country’s regulatory body. It modulates services pricing to ensure provision of affordable services to consumers. The Sudanese Journalists Union represents and lobbies for the rights of journalists and media owners in Sudan.

FILM AND AUDIOVISUAL POLICY

Sudan is working towards formulating a national cultural policy. In 2019, the Ministry of Culture and UNESCO, along with representatives of artists and organizations from the civil society working in the cultural industries sector, discussed policies for creativity in Egypt and Sudan, and mechanisms needed to support the emergence of strong and dynamic creative sectors, through the implementation of the 2005 Convention of the Protection and Promotion of the Diversity of Cultural Expressions. Among the topics addressed were cultural entrepreneurship, cultural policies for cultural and creative industries, trade and distribution of cultural goods and services, digital, artistic freedom, and gender equality. Mechanisms for international assistance, such as the International Fund for Cultural Diversity (IFCD), were also presented and a call for funding was launched.

There is currently no specific policy targeting the film or audiovisual sector, although filmmaking in the country is regulated. Filmmakers require licences to shoot in the country. Entry visas or entry permits are required for visiting crew wishing to film in Sudan. Crew members must register and apply for permits from the Sudanese Ministry of Interior, Department of Aliens.

Those travelling outside Khartoum must further obtain a travel permit from the Ministry of Humanitarian Affairs in Khartoum.

COPYRIGHT PROTECTION AND PIRACY

It is difficult to estimate the amount of revenue lost to piracy and copyright due to insufficient data and laws governing the sector.

Sudan joined the Berne Convention in December 2000. However, its first copyright law came into effect on December 18th, 1996. The country later on passed the Copyright and Neighbouring Rights (Protection) and Literal and Artistic works Act 2013 which protects art and content for all sectors including the audiovisual industry.

However, although the country is a member of the African Regional Intellectual Property Organization (ARIPO), a collective management organization (CMO) has not yet been established. The copyright law does not provide for the establishment of one either. In a workshop conducted in 2016, ARIPO pointed out that failure to cater to the licensing and documentation of the online environment will not only lead to losses in revenue for creators, but also unjust enrichment of those using copyright works on their online platforms without authorisation.
PRODUCTION

FILM

It’s difficult to predict how many local and international films are produced in Sudan per year. Indeed, there is no official data on this matter, nor the number of people employed in the film industry. This information is confirmed by an official from Sudan Ministry of Information, however, the said official declared that «it must be very few because of lack of funding» in the film industry in Sudan.

The history of film in Sudan dates back to the production of the first silent film, the documentary *Alarming the Queen’s Company of Grenadiers Guards*, at Omdurman in 1898 directed by John Benett-Stanford. By 1946, a fleet of mobile cinemas was travelling across the country showing films under the evening sky. Once thriving, Sudan’s open cinemas were however affected by the political environment. During these past years, its local film industry experienced a sharp decline.

Still, a few acclaimed Sudanese films were shot during the period, starting with *Hopes and Dreams* (1970) directed by Ibrahim Mallasy and the documentary *Throwing Fire* (1973) by Hussein Shariffe. Later, award-winning filmmaker Amjad Abou Alala produced *Coffee and Oranges* (2004), *Feathers of the Bird* (2005), *Tina* (2009), and *Train Station Studio* (2015). Hajjoj Kuka, an engineer turned filmmaker directed *Darfur’s Skeleton* (2009), the documentary *Beats of the Antonov* (2014), which won a People’s Choice Award at the Toronto Film Festival and *akasha* (2018), which premiered at the Venice Film Festival. In total, Kuka’s films have screened at over 60 film festivals and received seven international awards. In 2015, aircraft engineer and director Mohamed Kordofani won the Best Director Award at the Taharqa International Award for Arts for his short film *Gone for Gold*. His second short film, *Nyerkuk* (2016), received numerous distinctions including the Network of Alternative Arab Screens (NAAS) Award at Carthage Film Festival, the Jury Award at Oran International Film Festival, and the Black Elephant Award for Best Sudanese film at the Sudan Independent Film Festival. Lastly, Suhaib Galsmebari, a former media cameraman at Al Jazeera Media Network, produced *Sudan’s Forgotten Films* (2018), which won the prestigious Arts and Culture Story of the Year Award at the Foreign Press Association Media Awards in London in November 2018.

Meanwhile, most of the international films telling stories about or related to Sudan have been shot in foreign locations. *Attack on Darfur* (2009) was filmed outside of Cape Town, South Africa, *The Red Sea Diving Resort* (2019), directed by Gideon Raff, was shot in Namibia, and *The Good Lie* (2014) about Sudanese refugees resettling in the US, was shot in Atlanta, Georgia and South Africa. This last film, however, shone the limelight on Sudanese actors Arnold Oceng, Ger Duany, Emmanuel Jal, and Kuoth Wiel.

Since 2019, the Sudanese film industry has experienced a renaissance, with several Sudanese filmmakers attracting recognition on the world’s stage. In 2020, Sudan submitted its first film to the Academy Awards, *You Will Die at Twenty* (2019), after the film had already won the Lion of the Future award at the 2019 Venice Film Festival. *You Will Die at Twenty*, directed by Amjad Abou Alala, was also the first Sudanese film broadcasted on Netflix. Renowned Sudanese-Egyptian film director, scriptwriter and producer Marwa Zein also released the acclaimed film *Khartoum Offside* in 2019, as a follow-up to her short fiction films *A Game* (2009) and *One Week, Two Days* (2016).
Khartoum Offside premiered at the Berlinale Forum 2019 and was officially selected at prestigious international festivals such as Visions Du Réel, CPH DOX, Hot Docs, Sheffield 2019 and IDFA, winning the Best Documentary Award in FCAT in Spain and a Special mention Award at MAFF in Sweden.31 Talking About Trees (2019) directed by Suhaib Gasmelbari, a story about three Sudanese filmmakers of the 1960s and the decline of cinema in Sudan, won several awards at international festivals, including the Documentaire sur Grand Écran Award at the Amiens International Film Festival 2019, and best documentary at Athens International Film Festival and Berlin Film Festival.32

Today, some of Sudan’s most established production entities include Kordofani Films, founded and managed by Mohamed Kordofani,33 the Sudan Film Factory (SIFF), and the Sudan Film Group (SFG).34

In 2020, UNESCO Khartoum Office organized several meetings with stakeholders including Sudan Film Group, Sudan Film Factory and Taharga Film prize representatives with the aim to discuss challenges and ideas for reforming the Sudanese Cinema sector.

TELEVISION AND VIDEO

There are Sudanese series that air on TV including, Money and love, Wahag Alshoog, and Alasham. Alasham is currently broadcasting on Alhilal TV. These series doesn’t deal with domestic issues, but rather focuses on the lives of Sudanese families abroad.

Local filmmakers can also practice their craft by producing commercial, corporate, music or wedding videos, or by distributing their own creative work online.35 Quite a few are employed as news crews for international media outlets.

DISTRIBUTION, EXHIBITION AND BROADCAST

CINEMA EXHIBITION

The country’s 60 or so cinema screens showcasing Hollywood, Bollywood and Arabic movies were all eventually shut down, and later put up for sale.

In 2016, an association called the Swiss Initiative – Culture Projects Sudan, a joint venture between Swiss and international filmmakers, set out to begin renovations on a historic cinema in Khartoum. Between January and March 2021, a few drive-in cinemas were reopened to the public under strict Covid-19 measures, with filmmakers preferring to screen on giant screens in open fields. A festival organized by the British Council attracted 100 vehicles in Khartoum.

BROADCAST

In Sudan, the penetration of TV sets is slowly progressing, reaching around 47% of households in 2019. The channel reception consists almost exclusively of free-to-air channels. Most accesses are provided through direct-to-home satellite, as in neighbouring countries of the Maghreb.

The National Television, Sudan TV, was established in the 1960s and is managed by the National Radio and Television Corporation (NRTC) and the Ministry of Information.36 The other local paid TV called Khartoum international TV broadcasts international football leagues and movies. There are over 19 television stations operating in Sudan using the Nilesat satellite. Some State television stations also benefit from the national television’s access to the same satellite. Although the television channels in Sudan are free and there are no subscription fees or conditions applied to consumers, some private and national television stations moved to the new system, DVB-S2, which blocked approximately half of the consumers who do not have access to the HD digital home satellite television receiver.

In Sudan, private media have a hard time to compete in the local market, meaning that TV channels from Middle Eastern countries broadcasting entertainment content are more popular with the Sudanese audience than the local TVs stations.37 There are 14 satellite private TV stations operating in Sudan out of 23 TV stations that were registered. The 9 TV stations are no longer operating in Sudan for reasons including lack of funding. Tasaytee TV, a drama station, is on a trial period. It plays songs, educational features and sports.

Finally, international operators capture the essence of the small pay-TV market, namely beIN, DStv and for a minor part, OSN and MyHD, after the country migrated to digital terrestrial television (DTT) in 2015.38

DIGITAL PLATFORMS

Sudan’s internet subscribers reached 13.7 million in January 2021, for an internet penetration of 30.9%. At the same period, 33.74 million individuals were connected to a mobile phone, representing 76% of the total population in January 2021.39

The reforms in 2019 eased internet-related restrictions. The transnational government’s interim constitution, which promotes freedom of expression as well as the right to access the internet, was published in August 2019. Still, internet access remains prohibitively expensive for many users. A month of fixed-line internet service can cost nearly half the average monthly income in Sudan. During the shutdown, internet services are also intermittently available via some Canar Telecom and Sudan Telecom Company (Sudatel) ADSL fixed-line connections. Canar Telecom and Sudatel services rely on expensive optical fibre infrastructure which very few individual users can afford. Other licensed telecommunications providers which operate in Sudan are Zain, MTN, and Sudatel. In August 2019, telecommunications companies were reported to have raised internet subscription fees by 15%.40
Regarding video streaming, some subscribers use VPNs to access international sites such as Netflix, and HBO. Showmax is not available for streaming in Sudan, and neither is Amazon.

### FUNDING SOURCES AND MECHANISMS

There is no public funding for the filmmakers and funding was one of the major issues discussed in a film policy drafting workshop conducted by the Sudanese Ministry of Culture, UNESCO, and filmmakers in Cairo, Egypt in 2019. Content creators are calling for a more developed film infrastructure in Sudan, with studios for production, writing and production schools, and government film funding, especially considering the rich content available to be filmed in Sudan. The experts also highlight that the lack of investors in the industry was one of the major reasons for the decline of cinema houses. Due to the lack of public funding, many filmmakers rely on loans as well as grants from international organisations. International firms like media house Aljazeera through its flagship programme, Witness, also sometimes partner with Sudan filmmakers to produce films such as Sudan’s Forgotten Films (2018) directed by Suhaib Gasmelbari.

Groups such as the Sudan Film Factory (SFF) helps filmmakers access grants and loans. SFF also offers up to US$78.64 to creatives through its own Sudan Film Fund Emtedad production grant. Other private entities offering grants and training to filmmakers in Sudan include the Goethe Institute, the British Council, the Doha Film Institute, Filmmakers Without Borders (FWB), the DW Akademie Film Development Fund, and the AFAC - Arab Fund for Arts and Culture. AFAC supports individual artists and institutions through the following programmes: Visual Arts, Performing Arts, Documentary Film, Arab Documentary Photography, Creative and Critical writings, Research on the Arts, Music, Training and Regional Events, and Cinema. The tenth program, Arts and Culture Entrepreneurship, targets arts and culture institutions through a nomination process.

### PROMOTION

In 2014, the Sudan Film Factory partnered with several other organisations to launch the Sudan Independent Film Festival (SIFF) which takes place annually. In 2016, it introduced an award called The Black Elephant, designed to help Sudanese filmmakers advance their productions. The award assists with funding, training and networking opportunities. SIFF is a weeklong event that includes workshops, vocal performances, lectures, and showcases different documentaries, short films, and feature films from Egypt, Ethiopia, Kenya, the U.S, Sudan and other countries. The British Council also runs and manages the Sudanese European Film Festival, which screens Sudanese and EU films. In March 2021 and because of Covid-19 restrictions, the week-long festival was held outdoors in drive-in cinemas.

### EDUCATION AND TRAINING

There are no public institutions offering film courses in Sudan. Film students are either studying abroad or trained by private.

The Afrika Film School is one of the private filmmaking educational projects that are based in the capital of Sudan, Khartoum. It offers courses in film production, film theory, digital media production, script writing, film directing, sound design, cinematography, digital film editing, costume design, set design, makeup art for film and acting, and also short workshops on proposal writing for film funds, writing movie analysis essays and writing film review articles. The Sudanese Film Group (SFG) also offers a training package in scenario writing, direction, photography, editing, sound, film history, and film appreciation. SFG conducts several training workshops in Juba in South Sudan, and Al Fasher and Khartoum in Sudan.

The Sudan Film Factory has trained more than 300 young men and women in various aspects of filmmaking, and graduates of the institute participated in producing You Will Die at Twenty (2019). In the past decades, the Film Factory has organized some 30 screenwriting, directing and editing workshops, and produced more than 60 short films, many of them recognized in international festivals. The Swiss Initiative – Culture Projects Sudan also conducts workshops and training for filmmakers. The project is funded by UNESCO, as well as Swiss and international filmmakers. Lastly, the Goethe Institute and the British Council also offer professional training to Sudanese filmmakers.
TOGO

Population: **10.4 million**
GDP per capita: **US$ 1,596**
Median age: **19.4 years**
Urban population: **42.2%**
Rural population with access to electricity: **22.4%**
Mobile phone subscription: **77.9%**
Internet users: **12.4%**
Female upper secondary education completion rate: **8%**


**This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.**

### MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The film sector comes under the supervision of the Ministry of Culture and Tourism. Within this Ministry, the National Directorate of the Film Industry (Direction Nationale de la Cinématographie) is responsible for the implementation of development policy for the film and video industry in Togo.

The High Authority for the Audiovisual and Communications industries (Haute Autorité de l’Audiovisuel et de la Communication) is the entity which manages and regulates the whole of the media, including television broadcasting.

### FILM AND AUDIOVISUAL POLICY

A bill of a proposed law is in the course of adoption by the National Assembly, with industry professionals involved in the drafting process of the bill. The National Directorate of the Film Industry anticipates its adoption in 2021.

#### COPYRIGHT PROTECTION AND PIRACY

Industry professionals estimate loss of earnings for the industry due to piracy at between 50 and 75%. The Togolese Copyright Office (Bureau Togolais du Droit d’Auteur, BUTODRA), created in 1991, is responsible for defending the rights and managing the interests of authors and creators of intellectual works. It collects copyright royalties from users of intellectual works and pays them to authors. In order to accomplish its mission, the BUTODRA has seven regional agencies.

### PRODUCTION

The National Directorate of the Film Industry indicates the existence of ten registered and structured production companies, providing 300 direct jobs and 500 indirect jobs.

### FILM

The national production remains modest and has not yet managed to reach local audiences. The majority of Togolese production is therefore markedly imitates Nollywood production, without for the time being having succeeded in winning over local audiences, which are used to consuming films and series from Nigeria and Ghana. The biggest box office success in Togo, *Rédemption* (2019) by Toussaint Akuetey and Charles Koutowou, reached an audience of 3,000 cinemagoers.

The National Directorate of the Film Industry indicates that an average of 70 films are shot in the country per year and six foreign shoots.

Very few foreign films are listed as having been shot in Togo. One exception is *Ashakara* (1991) by Franco-Swiss director Gérard Louvin.

### TELEVISION AND VIDEO

On the Togolese audiovisual scene, the YoBo Studio and its owner, producer/film-maker Angela Aqueruburu, stand out for their successful television series: *Zem, Palabres*, and their latest series, *Hospital IT*, produced by Côte Ouest Audiovisuel, as well as for their innovatory forthcoming projects.

There are no precise figures on audiovisual production companies. However, these are overwhelmingly based on the production of music videos or corporate films.

### DISTRIBUTION, EXHIBITION AND BROADCAST

#### CINEMA EXHIBITION

Togo has two cinemas belonging to the Canal Olympia group, as well as the cinema of the Institut français, which regularly programmes films. Togo’s National Directorate of the Film Industry is undertaking a project for the creation of a cinema in Lomé. Local films are occasionally premiered in the cinemas.

#### BROADCAST

Television viewing has increased over the years, reaching around 47% of households in 2019. Most households still receive free-to-air (FTA) channels, with the most common access being terrestrial television. The transition to digital terrestrial television (DTT) has been delayed for several years and is still not finalised.

Togo has one public television channel and ten private channels.
With regard to pay television, as in other countries of francophone Africa, the market has been dominated by the international actor Canal+ for years.

**DIGITAL PLATFORMS**

In January 2020, Togo had 1.71 million internet users, representing a market penetration of 21%. The number of internet users in Togo increased by 124,000 (+7.8%) between 2019 and 2020. Mobile use reached 78% of the population in 2019. The market is shared between Moov (Etisalat) and Togo Telecom. 26% of active mobile subscribers had access to the Internet via their mobile in 2019, partly offsetting the low rate of access to fixed broadband services.

The streaming platforms Netflix, Mycanal and Iroko+ share the national market, which remains very modest in terms of volume.

**FUNDING SOURCES AND MECHANISMS**

The only source of direct funding for films in Togo remains the Fund for Support of the Arts (Fonds d’aide à la culture), a public fund for all artistic disciplines. The National Directorate of the Film Industry indicates an average of 40 films financed annually, with an average amount per film of US$9,000. Private funding is rare, although recently, microfinance companies have provided loans to finance films. This practice needs to be widespread.

NGOs also constitute a regular source of funding for institutional documentaries for awareness-raising and education campaigns.

**PROMOTION**

There are many film festivals in Togo, given the small size of the local industry, most of them being small-scale events. These events include the Lomé Film Festival (Festival de Cinéma de Lomé, FESCILOM), the Atakpamé Short Film Festival (Festival du Film Court d’Atakpamé, FESFICA), the Emergence Films Festival, the Blitta Documentary Film Festival (Festival du Film Documentaire de Blitta), and the Lagunes International Film Festival (Festival International du Film des Lagunes, FESTILAG).

The most important is the Emergence Films festival, created in 2014 by the young Togolese filmmaker Joel M’Maka Tchédré. Emergence is a film festival open to young African filmmakers with films (fictional or documentary) of a maximum length of 30 minutes for the competition category and films of more than 30 minutes for the non-competition category.

**EDUCATION AND TRAINING**

Since 2006, the Higher Educational School for Film and Audiovisual Studies (École Supérieure des Études Cinématographiques et de l’Audiovisuel, ESEC Togo) has been providing modular courses and academic diplomas in film and audiovisual industry professional occupations such as filmmaking, sound, image, editing, production and film dubbing.

Masterclasses and workshops are occasionally organized within the framework of film events, in partnership with institutions, such as the Goethe-Institut. The private telecommunications company Canal+ has also organized the “7 days for 1 film” initiative (7 jours pour 1 film), which is a travelling campaign for the discovery, training and promotion of women who aspire to work in the film industry, particularly in Africa.

**NOTES**

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The General Directorate of Performing and Audiovisual Arts (Direction générale des arts scéniques et audiovisuels) regulates the sector through other centres, commissions and councils, notably the National Center for Cinema and Image (Centre National du Cinéma et de l’Image, CNCl) created in 2011. The CNCl is responsible for managing the Tunisian Cinematheque (Cinémathèque Tunisienne) run by Hichem Ammar, three cinema theatres, the Creative Digital Lab (CD) which provides a forum for the development improvement and incubation of operators in the ecosystem, and the Gaming Center, a space to test and promote Tunisian video games. The CNCl is also in charge of the Carthage Film Festival (Journées Cinématographiques de Carthage).

The missions of the CNCl include the development and implementation of public policies with regard to cinema and motion picture, the promotion of the film industry through direct funding of creation, the production and dissemination of film and audiovisual works, and the organization of the professions linked to these domains. The CNCl also aims to mobilize civil society bodies active in the film sector, like amateur film clubs and the forums and festivals organised by associations.

Prior to the CNCl, the Film Production Aid Commission (Commission d’Aide à la Production Cinématographique) was created in 2001. The Commission is tasked with encouraging all artistic initiatives in the field of cinema through the financial support mechanism.

A Film Review Commission (Commission de Contrôle Cinématographique) was created in 1982 to accept requests for cinema film screening licences and to express an opinion as to their granting.

The sector is also regulated by Decree No. 2001-717 of 19 March 2001, setting the conditions for the granting of film production incentive subsidies. The Decree No. 2009-1338 of 28 April 2009 institutes a single-access point for the administrative services required for shooting Tunisian and foreign films with foreign participation. Lastly, two orders of the Minister of Culture and Heritage Preservation of 29 September 2010 approved the specifications for the creation and operation of a commercial cinema theatre and the opening and operation of a video rental store.

Other associations have been created more recently, namely the Tunisian Association of Independent Video and Filmmakers (Association des Cinéastes Tunisiens Indépendants, ACTI), the Association of Tunisian Filmmakers (Association des Réalisateurs des Films Tunisiens, ARFT), ECHOS Cinématographiques, the Union of Academic Filmmakers (Union des Cinéastes Académiciens) and the Tunisian Association of Directors of Cinematographic Photography (Association Tunisienne des Directeurs de la Photographie Cinématographique).

The Independent High Authority for Audiovisual Communication (Haute Autorité Indépendante de la Communication Audiovisuelle, HAICA) is the regulatory authority for the dissemination of audiovisual media, created by decree no. 2011-116 of 2 November 2011 on the freedom of audiovisual communication.

The HAICA disposes of regulatory and consultative powers to promote the culture of pluralism and to establish a new mode of governance for audiovisual media in Tunisia.

**FILM AND AUDIOVISUAL POLICY**


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

**INSTITUTIONAL FRAMEWORK**

**MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS**

The film and audiovisual sector in Tunisia is under the authority of the Ministry of Cultural Affairs. The Ministry is responsible in the field of culture and the safeguarding of heritage for establishing plans and programmes with a view to promoting these fields.

Population: **12.8 million**

GDP per capita: **US$ 10,756**

Median age: **32.8 years**

Urban population: **69.3%**

Female upper secondary education completion rate: **57%**


The film sector is also driven by numerous associations and organisations such as the Tunisian Federation of Amateur Filmmakers (Fédération Tunisienne des Cinéastes Amateurs, FTCA) and The Tunisian Association for the Promotion of Film Criticism (Association Tunisienne pour la Promotion de la Critique Cinématographique, ATPCC).
Copyright is governed in Tunisia by a collection of legal texts, the most important of which are Law No. 94-36 of 24 February 1994 on Literary and Artistic Property, as amended and supplemented by Law No. 2009-33 of 23 June 2009, and Decree No. 2013-2860 of 1 July 2013 creating the Tunisian Organization of Copyright and Related Rights (Organisme Tunisien des Droits d’Auteur et des Droits Voisins, OTDAV) and defining its administrative and financial organization and its operating procedures.9 The OTDAV notably handles the collective management of copyright and related rights, the protection of copyright and related rights, and the protection of the moral and material interests of the holders of these rights.

Professionals estimate that less than 25% of the sector’s revenues are lost due to piracy. Piracy of film and audiovisual works is an area of major concern for the authorities. Since its creation, the OTDAV has introduced a fine of up to US$18,000 and the possibility of imprisonment for counterfeiting or copyright piracy.10 Several major films were pirated, including the documentary VHS Kahloucha (2006) by Nejib Belkadhi. Revenues from this production thus plummeted as soon as it became available at video stores. The loss of income following the pirating of VHS Kahloucha was estimated at US$101,000 by the director. However, these days professionals in the sector estimate that Tunisian films are generally not impacted by piracy.

**PRODUCTION**

There is a number of production companies in Tunisia. Some emerge for the duration of a single production while several dozen are regularly active.11 The National Business Register (Registre National des Entreprises, RNE) in Tunisia classifies companies according to activity: film production, film distribution, cinema film screening or video distribution and publishing.12 According to research conducted in 2015, women represented 24% of directors and 14% of producers.13

**FILM**

The beginnings of cinema in Tunisia date back to 1896 when the Lumière brothers filmed scenes live in the streets of Tunis. In 1908, L’Omnia Pathé opened its doors as the country’s first cinema theatre. In 1922, Zahra, the country’s first short film was shot, followed in 1937 by the first feature film entitled Majnoun el Kairouan. In 1966, after independence, the first Tunisian film was produced, entitled Al-Fajr. From an institutional point of view, 1928 marked the birth of the first Tunisian film society.14

Tunisia is a popular film destination for international film shoots. More than 40 major foreign films have been shot in the country, notably The English Patient (1996), the Franco-Qatari-Italian film Black Gold (Or noir, 2011), the famous What the Day Owes the Night (Ce que le jour doit à la nuit, 2012) adapted from the novel of the same name by Yasmina Khadra, the American film Aquaman (2018),15 and the Star Wars saga. It is also thanks to one of the films in this series that Southern Tunisia was placed in the spotlight by virtue of its natural décors and the atypical architecture of Tataouine, Tozeur, and Nefta, which are now world renowned.


Several Tunisian films have also been selected for the Oscars, including Brotherhood (2018), a short film by Meriem Jaboobur nominated in 2020,16 and The Man Who Sold His Skin (L’homme qui a vendu sa peau, 2021) by Kaouther Ben Hania, nominated in the category of Best International Film.17

Most films in Tunisia receive aid from the CNCI, with an average of 20 films per year in recent years receiving aid.18 In total, professionals estimate the number of feature films shot every year in Tunisia at around forty. In 201, 37 feature-length films and 41 short films, supported or not by a ministry subsidy, were shot in Tunisia.19 Another sign of the prosperity of this sector is the increase in demand for all types of filming, up from 138 authorizations in 2016 to 150 in 2018.

With regard to revenue from local productions, there is no regular statistical overview of ticket office takings for cinemas nor revenue reports. A single-access point system was only introduced in 2018.20 The number of cinema admissions in 2019 stood at 2.7 million. At an average of US$3.07 per ticket, takings reached approximately US$8.3 million in 2019. In 2020, professionals estimate that the loss of income from operating revenues due to the pandemic was 75%, with an estimated turnover of US$2.1 million.

**TELEVISION AND VIDEO**

Each channel, whether state or private, produces at least one or two series. For several years now, the supremacy of the national channel has given way to private channels like Al Hiwar Ettounsi, Nessma, Hannibal and Attessia, the productions of which take the lion’s share.

2021 was no exception. The channel Watania 1 broadcast the series Kan Ya Makanech, the second TV production by the young director Abdelhamid Bouchnak after Nuba written by Hatem Belhaj. The same channel chose to broadcast a comedy sitcom entitled Icha Fell by the director Mohamed Ali Saidane.

Other examples released this year include El-Haraq, directed by Lassaad Oueslati and produced by the national channel; Ouled El Ghoul, a major production of 30 episodes directed by Mourad Ben Cheikh and the sitcom El Jlassouss produced by Rabeh Takali for the channel Attessia;
the comedy sitcom *Ibn Khaldoun* and the drama serial *Foundou* broadcasted on El-Hiwar Ettounsi; the comedy entitled *16/16* by Nessma TV; and the Tunisian-Algerian series *Millionnaire* on the channel Hannibal.21

### DISTRIBUTION, EXHIBITION AND BROADCAST

#### DISTRIBUTION COMPANIES

Film distribution in Tunisia is primarily concentrated around a few distributors in a constantly changing landscape. The group Goubantini, currently headed up by Lassaad Goubantini, heir to a Tunisian family of cinema owners since 1962, operates several cinemas. The group has also launched its own production for cinema and television.22

The second distributor to have made inroads is Hakka Distribution. Founded in 2013, this company has specialised in the distribution of independent and foreign films in cinemas in Tunisia.

#### CINEMA EXHIBITION

The number of active cinemas in Tunisia currently stands at 18 or 19 for 12 million inhabitants (one cinema per 666,000 inhabitants) compared to 100 for 3 million inhabitants in 1953 (one cinema per 30,000 inhabitants).23 A statistic in decline compared to previous decades, but on track for an upturn thanks to the recent investments of the CNCI to renovate cinema theatres.24

#### BROADCAST

The Tunisian television market is characterised by a strong market penetration of television sets in homes, a figure which has exceeded 96% for more than ten years. Pay television offers struggle to emerge in a market affected by the rise in piracy and by the dominance of free-to-air (FTA) satellite television, an access used by 94% of households in 2019.25 The digital terrestrial television (DTT) covers 99.8% of the Tunisian population.26

The country has three public television channels (Elwatania 1, Elwatania 2 and Elwatania Tarbaouia), and eight private channels (Attessia, Elhiwar Ettounssi, Nessma, Carthage plus, Telvza TV, Hannibal, Al-Inssen and Tunisna). Pan-Arab players take the bulk of free and paying markets, given that broadcast signals continue to be distributed in the region by satellite. A substantial national digital terrestrial television (DTT) offer exists as well.27

The leaders in the pay television market in 2019 were premium players beIN OSN, and My-HD.

#### DIGITAL PLATFORMS

The number of ADSL internet users in Tunisia stood at 7.92 million in January 2021 (66.7% of the population), i.e. an increase of 5% compared to 2020.28 The number of mobile internet subscribers is much higher at 17.84 million, i.e. 150.2% of the total population.

VOD streaming platforms like Netflix and Amazon Prime are not active in Tunisia. There are, however, two local VOD streaming platforms. Artify is the leading legal streaming site specialized in Tunisian cinema, operating in compliance with copyright. The platforms has a growing catalogue of over 70 feature and short films.29 The second site is Forja.tn, which allows audiences to watch films and series in high definition free of charge.30
The three mobile phone operators, Tunisie Telecom (with TTStreaming), Ooredoo (Starz Play), and Orange Tunisie (MBC shahid plus), have all launched their own mobile video services.

**FUNDING SOURCES AND MECHANISMS**

Funding for film production in Tunisia is primarily dominated by public subsidies. Producers can also turn to foreign funding or co-production agreements set up by Tunisia with other countries, such as France.

The Ministry of Cultural Affairs selects film projects from those submitted through the Film Production Aid Commission (Commission d’Aide à la Production Cinématographique) and grants the requested budget to the CNCI. In 2020, for example, the Commission selected 23 film projects, including nine feature-length films, two documentaries and one animated film, to receive total aid of US$1.4 million allocated through the CNCI.

Tunisian productions can also draw on foreign, institutional and private funds, like the Fund for the co-production of Franco-Tunisian films (Fonds de financement des coproductions de films franco-tunisiens), created between the CNCI and the French National Centre for Cinema and the Moving Image (Centre national du cinéma et de l’image animée français, CNC), which issues a call for projects every year, and the Franco-Italian Support Fund Committee (Fonds d’aide à la coproduction cinématographique tuniso-italienne). Foreign cultural centres and diplomatic offices also issue calls for projects to cover the funding, whether partial or complete, of Tunisian productions.

**PROMOTION**

Tunisia hosts a number of festivals, days and trade shows in the film and audiovisual sector to promote local and foreign productions. The most well-known event is without doubt the Carthage Film Festival (Journées Cinématographiques de Carthage), a film festival held every year in October. Created in 1966, the festival is overseen by a committee led by the Minister of Culture and composed of specialists in the film sector. The Kéliâbia International Amateur Film Festival (Festival International du Film Amateur de Kélibia, FIFAK), created in 1964, is held in Kélibia, a coastal town in north-eastern Tunisia, and is organized by the Ministry of Culture in collaboration with the Tunisian Federation of Amateur Filmmakers (Fédération Tunisienne des Cinéastes Amateurs, FTCA).

Various other events have been created more recently, such as the Gabès Cinéma Fen, founded in 2019 to replace the Gabès International Festival of Arab Film (Festival international du film arabe de Gabès) and which takes place over nine days in Gabès, in South Tunisia.

The Manarat Festival of Mediterranean Film (Festival du cinéma méditerranéen Manarat), created in 2018, is held in Tunis.

The city of Sousse hosts the International Film Festival for Children and Youth (Festival international du film pour l’Enfance et la Jeunesse, FIFEJ).

Locally, a dozen cultural festivals and events in the field of cinema and audiovisual take place in Tunisia.

**EDUCATION AND TRAINING**

There are a large number of training courses in cinema and audiovisual professions in Tunisia, at both public and private institutions and schools, which run long courses leading to qualifications and short courses.

Two public institutions offer film and audiovisual training degrees in Tunisia: the Higher Institute of Multimedia Arts of Manouba (Institut Supérieur des Arts du Multimédia de la Manouba, ISAMM) and the Higher Institute of Audiovisual and Film Studies of Gammarth (École supérieure de l’audiovisuel et du cinéma de Gammarth, ESAC) created in 2004. The ISAMM runs training courses in multimedia communication, video games, audiovisual, 3D and production. The ESAC provides training in editing, sound and mixing, lighting and image, set design, writing and direction, and production and distribution.

A private training sector exists in Tunisia, composed of three main schools. The School of Architecture, Audiovisual and Design (École Supérieure d’Architecture, d’Audiovisuel et de Design, ESAD) specialises in training architects, designers and creators, film and audiovisual professionals and visual artists. The ESAD teaches four Bachelor and Applied Bachelor degrees in cinema and audiovisual, camerawork, editing, directors’ assistance, sound and mixing.

The School of Arts and Cinema (École des Arts et du Cinéma, EDAC) teaches classes in French and Arabic with the goal of training students in the field of cinema and audiovisual as part of a three-year curriculum which leads to a BTS advanced technician’s certificate. It provides training in montage, direction, image and sound, among others, to an average of 30 students.

The Académie d’Art de Carthage (AAC) Arts and Design vocational training school, founded in 2008, is one of the pioneers of artistic, audiovisual and cinema training in Tunisia. Like other establishments it provides training in editing, production assistance, directors’ assistance, and sound recording, among other specialities.

In the animation sector, Net-Info is a school of art and technology specialised in training in the production of computer-generated images, animation and video games. The school is recognized by the Ministry of Vocational Training and Employment. It is an Autodesk and Adobe certification centre and academic partner. Since its creation in 1999, Net-Info has trained over 15,000 young talents and professionals from Tunisia and over 15 other countries, especially Francophone Africa.
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### UGANDA

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<th>Population: 59.4 million</th>
<th>GDP per capita: US$ 2,181</th>
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<td>Median age: 16.7 years</td>
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<td>Rural population with</td>
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<td>access to electricity:</td>
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<td>38%</td>
<td>Rural population: 24.4%</td>
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<td>Mobile phone</td>
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<td>subscription: 57.3%</td>
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<td>completion rate: 16%</td>
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This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

### INSTITUTIONAL FRAMEWORK

#### MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The film and audiovisual industry is overseen by a number of government ministries, departments and agencies with each one managing a specific mandate in the regulation of the sector.

Ministry of Gender, Labour and Social Development (MoGLSD), the umbrella ministry for the culture and creative industry, is for instance charged with providing strategic, technical leadership and advocacy on all matters of policy relating to film. The Uganda Communications Commission (UCC) on the other hand is tasked with streamlining the film distribution and exhibition sector as well as managing the annual national film festival – the Uganda Film Festival (UFF) – while Media Council of Uganda is responsible for film censorship and classification. Other government agencies involved with film regulation in Uganda include Uganda Tourism Board (UTB), Uganda National Cultural Centre (UNCC), Uganda Registrations Services Bureau (URSB) and Ministry of Finance among others.

Uganda Film Council (UFC), unveiled in 2016, is a collective administrative organization for the film industry working to ensure that its economic aspect is effectively realised for the benefit of all stakeholders. UFC is a private sector platform which aims to provide a focal point for the industry practitioners’ participation in matters of industry development and effective administration.

Artists are represented by the Association of Audio & Visual Distributors Limited (AAVDL), registered in June 2019, which markets and distributes content for creatives. The Association of Film Actors Uganda Limited (AFAUL) stands in for film actors and actresses whereas the Association of Cinematographic Interpreters & Publishers (ACIP) Limited represents film publishers.

The Association of Core Film Producers Uganda Limited represents a section of local producers. The private organisation protects their interests and markets their works too.

#### COPYRIGHT PROTECTION AND PIRACY

Practitioners estimate that up to 75% of film and audiovisual revenue is lost to piracy. Uganda’s growing film industry relies on old copyright laws which do not clearly establish rules to tackle piracy.
The payment of royalties is managed by the Uganda Federation of the Movie Industry (UFMI), the audiovisual Collective Management Organisation (CMO), which collects royalties for, promotes and protects both foreign and local filmmakers.6

**PRODUCTION**

Practitioners estimate that the Ugandan film and audiovisual industry employs some 5,000 people directly and 10,000 indirectly although the figures are likely higher given the fact that the sector is largely informal. No thorough mapping of the industry has ever been conducted to determine the exact number of people employed by the sector. A recent study by the Uganda Bureau of Statistics (UBOS), the national statistics and planning body, estimates that the entire local CCI contributes about 3.5% to national GDP of which film is thought to rank higher than most of the other domains within the sector.

**FILM**

The history of cinema in Uganda is closely intertwined with the country’s political history. It can be traced back to the colonial period when the country was governed by the British (1894-1962). In the early 20th century, film was mainly seen as a tool for education and acculturation through the Bantu Education Cinema Experiment under the Colonial Film Unit (CFU).7 The trend continues until this day, with NGOs using films like *Centre 4* (1994),8 and *Guno Mukwano/ Is This Love?* (2012),9 starring comedian Anne Kansiime, to educate the population on topics such as HIV/AIDS and domestic violence.

UNESCO was influential in laying the foundation for a domestic Ugandan film industry when in 1960 they took over the reins of the defunct local Colonial Film Unit and launched the Expanded Programme of Technical Assistance (EPTA) scheme which for the first time offered film training to Ugandans. The graduates of this programme, some of whom were offered scholarships for further film training abroad, went on to produce documentaries for the national broadcaster named UTV at the time. UNESCO’s efforts were however short-lived as the country descended into a 20-year civil war starting 1966 up until 1986.

Kinna-Uganda, a term that refers to films made in Uganda by locals, sprung out in the early 2000s with the film *Feelings Struggle,*10 produced by pioneer filmmaker Hajj Ashraf Ssemwogerere. Lack of funding opportunities is a challenge. However, Ugandan filmmakers have managed to find innovative ways to produce films at very low budgets which are then sold on DVD in the streets, online, or to TV stations.11 For example, Isaac Nabwana’s Wakaliwood (also known as Ramon Film Productions), based in Wakaliga near Kampala, has produced more than 40 low-budget action films over the last ten years at an estimated US$200 each. Wakaliwood is best known for its viral 2010 film *Who Killed Captain Alex?* which cost US$85 to produce.12 The action film, which was influenced by Chinese and Hollywood martial art films, has attracted over 5.8 million views on YouTube. In recent years, the emergence of YouTube and other digital platforms has boosted the demand for local films. However, most filmmakers do not earn what they project due to rampant piracy and a lack of clear negotiation and payment methods.

Several Ugandan films have premiered and won awards at international festivals. In 2007, *Divizionz*13 was the first Ugandan movie to play at a major international festival when it was shown at the Berlin Film Festival. Three years later, director Caroline Kamya’s debut feature film *Imani* (2010)14 also opened at the Berlin Film Festival, where it was nominated for Best First Feature. Films by social activist and writer Dilman Dila have also been showcased and nominated in various global festivals. *The Felistas Fable* (2013)15 won two nominations at the Africa Movie Academy Awards for Best First Feature by a Director and Best Make-up Artist, and was nominated for the African Magic Viewers Choice Awards for Best Make-up Artist, 2013. *Untouchable Love* (2011)16 was selected for International Documentary Film Festival Amsterdam’s (IDFA) Docs for Sale, 2011, where it picked a UK-based distributor. *The Sound of One Leg Dancing* (2011)17 won The Jury Award at the Nepal International Indigenous Film Festival in 2012.

His short film *What Happened in Room 13*18 is one of the most watched African films on YouTube with over eight million views. Ugandan filmmaker Matt Dish’s *Cut That Thing* (2013) was showcased at the Berlin International Short Film Festival 2012. *A Good Catholic Girl* (2010)19 premiered at Kolkata International Film Festival (KIFF), Zanzibar International Film Festival (ZIFF) and Vancouver International Film Centre (VIFF) in 2011.

Uganda has also served as a location for a few major international films. *The Last King of Scotland* (2006),20 starring Hollywood actors Forest Whitaker and Kerry Washington, was shot in Uganda. In 2016, Disney’s *Queen of Katwe* starring Lupita Nyong’o was partly produced locally.21 In 2019, *Kony Order from Above*22 was the first Ugandan film to be submitted for the Academy Award for Best International Feature Film.

Overall, practitioners estimate that about 200 local films are produced in the country per year. The film sector, however, faces numerous issues such as informal professional associations with minimal data collection, limited technical training, lack of access to funding, high levels of piracy and limited capacity amongst filmmakers to support local content development and professionalisation.23

Uganda also continues to lose huge revenues due to its lack of proper film structures, notably lack of a rebate system, as foreign productions of local stories have been moved to other countries. Some of the notable international films about Uganda which have been shot in other countries include; *Rise and Fall of Idi Amin* (1981), *The Silent Army* (2008), *Machine Gun Preacher* (2011), *Queen of Katwe* (2016) and *Seven Days in Entebbe* (2018).
TELEVISION AND VIDEO

Like in many countries, budding filmmakers in Uganda often get started in the sector by shooting wedding, music, advertising or corporate videos.

Caroline Kamya, filmmaker and iVAD International (production company) founder launched Nativ, with the support of African diaspora to support talented filmmakers in Africa. Nativ serves as a database for African professionals through which the locals can showcase their skills, talents and content to international experts and audiences. The British-Ugandan multi-award-winning film producer and director noted that the platform will also serve as a streaming platform.

Ugandan broadcasters operate on the barter model, which means that producers have to purchase airtime to show their content and share advertising revenue with the station. In 2013, the Ugandan Communications Commission established a local content quota system that requires Ugandan television stations to broadcast 70% local content during primetime (6:00-11:00pm), of which 40% should be independent productions. Films aired on Ugandan TVs include *The Campus TV Series* (2007), *Don’t Mess With Kansiime* (2014), and *Deception* (2013).

MultiChoice, Africa’s premium pay TV, runs two channels on their platforms – Pearl Magic and Pearl Magic Prime – that are entirely dedicated to Ugandan content. The pay TV giant has commissioned over 10,000 hours of local content in Uganda alone and many more across the East African region.

DISTRIBUTION, EXHIBITION AND BROADCAST

Most producers in Uganda market and sell their content directly without intermediaries. The Association of Audio & Visual Distributors Limited (AAVDL) is one of the bodies which assist filmmakers to sell and market their work.

CINEMA EXHIBITION

Stakeholders estimate that Uganda has only ten functional cinemas constituting less than 50 screens spread across Kampala, Entebbe and Mbarara. These are mostly community and privately owned establishments.

VJaying

Local artists also use Vjaying as a form of entertainment in local cinema halls. VJs (Video Jockey) are experienced performers who translate and narrate over foreign films in makeshift shacks all over the country. They tend to translate foreign language to locals while using styles such as humour and storytelling to capture attention. The narrator connects one end of a public address to a TV or computer and the other end connects to a speaker. With a push of the lever downwards, the audio input of the video is silenced, thus enabling the VJ to speak into the microphone and over the media content. Some instruments are usually locally assembled with juice cartons and wires while some are purchased in stores.

BROADCAST

In Uganda, TV sets penetration reached 36% of households in 2019. Pay TV consists of direct-to-home satellite (DTH) and digital terrestrial television. The free channel receptions consist primarily of digital terrestrial broadcast and are the most watched. Uganda was the third country in East Africa after Tanzania and Kenya to migrate from analog to digital, with the process commencing in 2015 and ending in 2017.

Today Uganda has 30 TV stations. It has one public TV channel, the state-run Uganda Broadcasting Corporation (UBC), and eight pay TV service providers, MultiChoice Uganda (DStv), Star DTV Uganda (StarTimes), Pearl Digital TV, Kampala SITI Cable, Smart TV, Time Watch Cable, Zuku TV and GoTV. In 2020, the number of pay TV subscribers stood at 1.55 million.

DIGITAL PLATFORMS

Like in many other countries, the once-thriving DVD market for local films has collapsed in recent years with the advent of online platforms.
In January 2020, Uganda’s mobile subscribers reached 26.83 million, or the equivalent of 60% of the country’s total population.\textsuperscript{26} The major mobile phone service providers are MTN Uganda, Airtel Uganda, Uganda Telecom and Vodafone Uganda.\textsuperscript{37} The number of internet users as of January 2020 stood at 10.67 million, representing a 24% penetration. Of those, over 2.5 million (5.6%) are social media users. The cost of data in Uganda is relatively higher as compared to its neighbours. In 2020, Uganda was ranked 23rd in Africa in regards to the cheapest mobile internet.\textsuperscript{38}

The development of the VOD market in Uganda faces typical challenges such as unclear payment methods, and internet access and affordability. Showmax (MultiChoice), iROKOtv, and Netflix are the major international digital platforms operating in Uganda, with local platforms like Wakaliwood.com and Kibanda Xpress also popping up.\textsuperscript{39} Mobile operators have their own mobile video stores, such as Airtel Uganda’s Airtel TV.\textsuperscript{40}

**FUNDING SOURCES AND MECHANISMS**

Filmmakers in Uganda grapple with a lack of funding for their projects.\textsuperscript{41} Public funding is not available. However, the EU-funded UNESCO project for the development of the film sector currently underway is exploring the establishment of a national film fund.\textsuperscript{42} In 2020, Uganda Communications Commission also launched a local film funding scheme, the Content Development Support Programme (CDSP), although it’s still unclear how the fund will be run.\textsuperscript{43}

Cultural institutions and international foundations or NGOs such as Reel Impact Foundation and United in Film sometimes offer short film funds to creatives to produce short films and documentaries.\textsuperscript{44} Low budget films such as those in Wakaliwood are financed by private investors and the producers themselves.

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**PRIVATE INSTITUTIONS**

Kampala Film School, a subsidiary of Kampala University, was one of the pioneer film schools in Uganda.\textsuperscript{51} Alongside other private institutions such as the Uganda Film and Television Institute, the Media Vision Academy and Proline Film Academy,\textsuperscript{52} it offers degrees, certificates and diplomas in videography, animation, screenwriting, production, editing, sound and film, and other short courses.

A number of private institutions, such as the MultiChoice Talent Factory, also offer short filmmaking courses or workshops.\textsuperscript{53} The most prominent programme is the Maisha Film Labs, a non-profit initiative providing hands-on training in screenwriting, directing, producing, cinematography, editing, sound recording, and acting to emerging East African filmmakers. Founded in 2004 by acclaimed director Mira Nair (\textit{Monsoon Wedding, The Namesake, Amelia}), Maisha operates film training labs in Kenya, Uganda, Tanzania, and Rwanda. In the last seven years, Maisha has provided over 400 scholarships and expanded into a year-round curriculum encompassing a variety of skill levels. It has ventured to make film available to the entire East African community through cultural exchanges, partnerships, a monthly film chat, and an annual film festival. Many alumni now have thriving careers in film and television, both in East Africa and internationally, and others have enrolled in some of the most selective MFA programmes in the world, such as NYU Tisch-Singapore and Columbia University.
17. IMDb: The Sound of One Leg Dancing https://www.imdb.com/title/tt2137392/
20. IMDb: The Last King of Scotland https://www.imdb.com/title/tt0455590/
21. Maisha Film Lab http://maishafilmlab.org/team/directors/
27. The Independent: Deception Archives https://www.independent.co.uk/tag/deception/
38. Film Freeway: Pearl International Film Festival https://filmfreeway.com/PearlInternationalFilmFestival
41. Kampala Film School: HOD’s Message https://paf.mak.ac.ug/node/9
42. Kampala Film School: Bachelor of Arts in Drama and Film https://paf.mak.ac.ug/node/11
43. Kampala Film School: www.kampalafilmschool.com/
44. Proline Film Academy: Unlocking your potential through Filming & Photography www.prolinefilmacademy.com/
United Republic of Tanzania

Population: 79.2 million
GDP per capita: US$ 2,660
Median age: 18 years
Urban population: 34.5%
Rural population with access to electricity: 18.8%
Mobile phone subscription: 77.2%
Internet users: 25%
Female upper secondary education completion rate: 7%


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

Institutional Framework

Main Representative and Regulatory Institutions

Established in 1976, the Tanzania Film Board advises the government on film and theater issues in the country, supervises and coordinates the development of the film and theater industry, and supervises the performance of the Film Federation and industry stakeholder associations. It is also responsible for licencing, certification, regulation and content examination of local and international motion picture, stage and radio plays as well as registration of motion picture, stage and radio plays practitioners and dealers. The Tanzania Film Board aims at promotion of the film industry at large.

The Tanzania Film Federation (TAFF) is Tanzania’s film stakeholders’ apex organisation, formed to bring together film industry stakeholders’ associations. The Federation is a body with the mandate to oversee the implementation of the Motion Picture and Performing Arts in Tanzania. Currently, there are nine associations that are members of the Federation.

Regarding the broadcast sector, the Tanzania Communications Regulatory Authority (TCRA) is a quasi-independent government body responsible for regulating the Communications and Broadcasting sectors. Currently, TCRA has 35 licensed operators, 142 written regulations, and 89 enforced policies. The Media Council of Tanzania (MCT) is an independent, non-statutory body representing the media community. Its mandate is to: oversee and promote ethical practice, mediate and arbitrate complaints over media practice, promote press freedom and right to information, and promote and ensure high standards and media accountability.

Film and Audiovisual Policy

In July 2020, the Tanzanian government introduced regulation aimed at streamlining operation costs, copyrights, financial and licence challenges. Filming permit fees were reduced and the Arts and Culture Development Trust Fund was re-established to provide financial support to the artists.

In 2019, new restrictions were also placed on foreign filmmakers. Foreign companies filming in Tanzania now must give the government the right to vet raw footage and let the country use the movie in promotional material. Filmmakers must also submit a finished copy of their work to the Tanzania Film Board or a delegated authority to get clearance before exiting Tanzania. Failure to comply will leave the entity responsible for a fine of 5% of the production budget.

Copyright Protection and Piracy

The Copyright Society of Tanzania (COSOTA), and the Copyright Society of Zanzibar (COSOZA) are statutory bodies set up under the Ministry of Information, Culture, Arts and Sports and vested with the power to administer the Copyright Act. They promote and protect the interests of filmmakers, maintain registers of production, protect the rights of content owners, and provide evidence in case of infringement or dispute. Practitioners estimate that 25-50% of film revenue in Tanzania is lost to piracy annually.

Production

According to a 2007-2010 survey on the Economic Contribution of Tanzania’s Copyright Industries by the World Intellectual Property Organization (WIPO), the Tanzanian copyright-based industries, of which film and music are a significant part of, generated an added value of between 170 million and US$295 million creating over 150,000 jobs during that time period. Practitioners estimate that a dozen production companies operate in the country, with the audiovisual industry employing some 44,331 people directly or indirectly.

Film

The film sector in Tanzania traces its origins to the colonial period. At independence, Tanzania inherited mobile instructional and private commercial cinemas. The government established its own film unit under the ministry of Community Development in 1984.
A few foreign films have been shot in Tanzania, including *Men of Two Worlds* (1946), *Hatari!* (1962), with John Wayne, *Albino United* (2010), and documentaries such as *Impressionen unter Wasser* (2002), *The Crimson Wing: Mystery of the Flamingos* (2008), or *Isingiro Hospital* (1992). However, the country has not attracted as many international productions as its neighbour Kenya, despite a similar offering in terms of wildlife locations, including world-class nature sites such as Mt Kilimanjaro, the plains of the Serengeti, beaches and island getaways.

The local film industry, sometimes referred to as Bongo movies, emerged in the early 2000s. Bongo films are heavily influenced by Indian (Bollywood) and Nigerian (Nollywood) cinema, as well as by the success of Tanzania’s own “Bongo Flava” music industry. Bongo music played a role in promoting Bongo movies as artists started referring to popular films in their lyrics. Some of these films include *Bongoland* (2003), *Bongoland II* (2008) starring Erick Baruti and Christina Breidenbach, and *A Point of No Return* (2008) starring Wema Sepetu and the late Steven Kanumba. Bongo films were initially released and sold on DVDs or VCDs in Tanzania and across the Swahili-speaking region. In 2016 during Bongo movies’ heyday, some 1,400 films were produced and registered annually in Tanzania.

Production budgets in Tanzania vary greatly, with the average film produced for about US$4,312. A small niche of films produced for significantly more (up to US$250,000) does exist, but these are generally funded by international organisations for development or educational purposes. For example, *Hadithi za Kumekucha: FATUMA* which won several awards including Best Picture at ZIFF in 2018, was funded by USAID.

A few Tanzanian filmmakers have been able to cross national boundaries and have a global impact. Director Amil Shivji, for example, has received international recognition for his films. *Shoshide* (2013) premiered at the International Film Festival Rotterdam (IFFR), and won awards at the Zanzibar International Film Festival (ZIFF), *Samoki Mchanganji* (2014) was recognised at IFFR and FESPACO in Burkina Faso, and *Aisha* (2015) was screened in the US and Europe. In 2019, the Netflix-backed Atlas Workshop in Marrakech showcased films from Tanzania, with the post-production lineup featuring Amil Shivji’s historical drama *A Tug Of War*, which is due to be released in 2021.

Tanzanian-American filmmaker Ekwa Msangi, who grew up in Kenya and is now based in New York, is also carrying the Tanzanian flag high. Her productions include the award-winning comedy *Soko Sonko (The Market King): Farewell Amor*, MNET’s first-ever original hour-long Kenyan drama series; and the most recent feature, which premiered at Sundance in 2020. The first and only Tanzanian film to be submitted for the Academy Awards was the 2001 American-Tanzanian co-production *Maangamizi: The Ancient One*.

As part of promoting the film industry in Tanzania, the government plans to construct a film complex with modern film facilities such as cinema halls, film studios, movie theaters and movie shops by 2025. The Ministry of Information, Culture, Arts and Sports aims at promoting strategic investment in the film industry.

**TELEVISION AND VIDEO**

Many up-and-coming Tanzanian filmmakers make a living and hone their craft by filming Bongo music videos, weddings, or corporate content. Demand for local content from broadcasters is also high, but Tanzanian TV stations still operate on the barter model which means that they expect producers to pay for airtime. In 2017, the Ministry of Information, Culture, Arts and Sports introduced a 30% local content quota for broadcast.

**Pay TV channels Azam TV** and Multichoice do purchase local programmes, however, with prices reaching between 911 and US$3,000 per episode. Multichoice’s channels Maisha Magic East and Maisha Magic Bongo are both popular across East Africa. Maisha Magic Bongo, with shows like *Harusi Yetu*, *Doli Armano* and *Huba* is specifically aimed at a Tanzanian audience, while close to 70% of the local content on Maisha Magic East in 2017 was produced in Tanzania. In February 2020, Azam Media, owned by Azam TV, launched a new channel dubbed Channel U, an exclusive local entertainment channel to boost filmmakers and the industry.

Sinema Zetu is one of the flagship channel in Azam pay TV platform and is rated as the best African Movie Channel. Some local films aired on TV are *White Shadow* (2013) directed by Noaz Deshe, *Peponi* by Nicholas Marwa (2019), and *Binti* by Seko Shamte (2021). Bongo music videos by popular artists such as Diamond Platnumz, Lady JayDee, Nandy, Jux, Zuchu, Alikiba, Harmonize, or Rayvanny also get a lot of airtime on television.

**DISTRIBUTION, EXHIBITION AND BROADCAST**

The Tanzanian film industry lacks proper distribution for films, and filmmakers lack knowledge about deal structuring.

Leading production company Steps Entertainment, established in 2007, claims to have produced and distributed over a million copies of locally-made movies to countries like Congo, Zambia, Kenya, Uganda and the Comoros. However, with the VCD business model now rendered obsolete by the digitalisation of the content industry, and new fees and restrictions put on film licences, the production and registration of local films has gone down significantly to an average of ten films per week, translating to over 500 films a year. Today, Steps has abandoned the film business and reconverted to the solar industry.
CINEMA EXHIBITION

Tanzania has nine movie theaters including Century Cinemax (Mlimani, Oysterbay, Aura mall and Mkuki House), Majestic Cinema in Tanga, Regalz in Arusha, Regalz City Mall in Dar es Salaam, Suncrest Cineplex in DSM, Misterious Sinematix in Mwanza.

BROADCAST

In Tanzania, TV sets penetration reached 29% of households in 2019. Tanzania’s mass media are heavily urban-based with most of the TV stations based in Dar es Salaam. However, the mainland and Zanzibar have separate media policies.

Tanzania became the first country in mainland Sub-Saharan Africa to switch from analogue to digital television signal in December 2012. The switch was challenged by the limited geographical coverage of terrestrial broadcast (24% of population), the widespread use of free-to-air satellite TV, and the lack of public awareness on the installation of settop boxes. Still, Tanzania was able to shut down the analogue terrestrial signal in 2013 and is one of the rare countries in Africa that met the International Telecommunication Union (ITU)’s 2015 deadline.

Today, the channel reception consists primarily of direct-to-home (DTH) satellite broadcast both on pay and free reception. The three major broadcasting companies are the state-run Tanzanian Broadcasting Corporation (TBC), Azam Media Limited, and Clouds Entertainment Ltd.

The number of TV stations now stands at 48 according to the Tanzania Communications Regulatory Authority, including 27 Free-to-Air channels, which are amongst the highest watched. The Tanzanian Broadcasting Corporation (TBC) is the country’s public network and is owned and operated by the government. In the pay TV segment, the leader is the local satellite operator Azam Media. South Africa-based satellite TV operator Multichoice launched in Tanzania in 2002, and now offers 80 TV channels via digital satellite, reaching around 100,000 homes. Zuku, another satellite pay TV operator, entered the market in 2010. In 2020, the number of pay TV subscribers tallied at around 900,000.

DIGITAL PLATFORMS

Tanzania counts nearly 44.13 million mobile subscribers, the equivalent of 75% of the total population. Major mobile phone operators in Tanzania include Vodacom Tanzania, Tigo Tanzania and Airtel Tanzania. Meanwhile, the number of internet users reached 27 million by the end of 2020, with 19 million accessing the web through their mobile phones. Tanzania is ranked among one of the ten nations with the lowest data costs in Africa. In January 2020, 4.5 million Tanzanians used social media, a penetration of 7.6%.

The switch to digital has contributed to the growth of Over the Top (OTT) and Video on Demand (VOD) platforms. The VOD market is dominated by MultiChoice’s Showmax, while other players like Netflix, iROKOtv, Trace Play or Amazon Prime Video, are also available. Local platforms including Swahiliwood.com, and the telcos’ own mobile video stores.

FUNDING SOURCES AND MECHANISMS

There is no public funding for film in Tanzania. However, filmmakers can technically access small grants from the Tanzania Arts and Culture Trust Fund (Mfuko wa Sanaa na Utamaduni Tanzania). Most of these graduates opt for self-employment opportunities are scarce and many of these graduates opt for self-employment opportunities are scarce and many of these graduates opt for self-employment opportunities are scarce and many of these graduates opt for self-employment opportunities are scarce and many of these graduates opt for self-employment.

PROMOTION

Established in 1997, the Zanzibar International Film Festival (ZIFF) is Tanzania’s most renowned film festival, attracting international attention as it hosts movies, workshops, exhibitions, Dhow races, music and performing arts. As a showcase for local and regional films, ZIFF offers an opportunity for filmmakers to interact, compare experiences and participate in the global film industry. Entries for awards are called for all East African countries. The Sinema Zetu International Film Festival is another prominent event, showcasing both Swahili and foreign films. In addition, Tanzanian filmmakers and broadcast executives also regularly participate in international TV markets such as DISCOP, MIPTV and MIPCOM.

EDUCATION AND TRAINING

Over the past few years, opportunities for education and training in Tanzania’s film and audiovisual sector have grown, thanks to the launch of a number of private schools and programmes. Today, some 1,000 students graduate annually in Tanzania. Most of them from short courses and certificates. However, job opportunities are scarce and many of these graduates opt for self-employment in the Bongo movies industry.
PUBLIC INSTITUTIONS

Several public institutions such as the University of Dar es Salaam, and the Institute of Arts & Media Communication (IAMCO), offer degrees and diplomas in journalism and mass communication, public relations and advertising, communication and journalism, graphics and videography, animation, cinematography, editing, producing for film or television, production design, production management, screenwriting, script development and visual effects. In Zanzibar, the State University of Zanzibar (SUZA), offers degrees and diplomas in courses related to communication and media studies.

Taasisi ya Sanaa na Utamaduni Bagamoyo-TaSUBa is an East African Community (EAC) Centre of Excellence for visual and performing arts training with an overall objective of aiming at addressing partners states’ requirements for preservation, promotion and development of visual and performing arts within the EAC. The main functions and objectives of TaSUBa are to develop and promote Tanzanian arts and culture and impart knowledge of the same to existing and future generations. Also, TaSUBa conducts training, research and consultancy services in arts and culture by producing high quality professional artists, arts managers, cultural workers as well as producing arts products, services and multimedia productions. TaSUBa is under the Ministry of Information, Culture, Arts and Sports.

PRIVATE PROGRAMMES

St. Augustine University of Tanzania, (formerly known as Nyegze Social Training Centre - NSTC), owned and managed by the Catholic Church, offers degrees, diplomas and certificates in various journalism courses, while Tumaini University, the Tanzania Institute for Media Education (TIME), the Maarifa Media Trust (MAMET), and the Royal College of Journalism offer diplomas, certificates and short courses in film, production, sound integration, video editing, and animation.

In addition, a number of private programmes offer short film courses and workshops. Some of the best known ones include the MultiChoice Talent Factory, and the Film Pro Series, which trained 143 filmmakers from across East Africa through 13 specialised workshops between 2018 and 2020. Kenya-based Docubox also trains East African documentary filmmakers. Media for Development International Tanzania (MFDI-TZ) also collaborates and co-produces feature films with Entertainment-Education (EE) to promote local filmmakers. Finally, USAID, and the World Bank, also offer training in film and media in both Tanzania mainland and Zanzibar.
2. LinkedIn: Tanzania Film Federation. https://www.linkedin.com/in/tanzania-film-federation/204758a1
3. TCRA: Kijambo TCRA. https://www.tcra.go.tz/
4. MCT: What We Do. https://mct.or.tz/
23. Azam TV. https://azamtvco.tz/tanzania
26. https://www.ziff.co.tz/sinema_zetu
29. Stakeholder interview
34. MDF Tanzania: About SJMC. https://www.filmmaking.net/film-schools/school.index.php/id=848
ZAMBIA

Population: 24.3 million
GDP per capita: US$ 3,479
Median age: 17.6 years
Urban population: 44.1%
Rural population with access to electricity: 11%
Mobile phone subscription: 89.2%
Internet users: 14.3%
Female upper secondary education completion rate: 27%


This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

Zambia does not have a Film Commission in charge of the film and audiovisual sector. The oversight of the film and audiovisual industry (including copyright and rating) is part of the mandate of the Ministry of Information and Broadcasting Services, while the Ministry of Tourism and Arts’ Department of Arts and Culture is focused on crafts, visual arts and folklore guided by the National Arts Council.

When it comes to the broadcasting sector, the Independent Broadcasting Authority (IBA) regulates it. Broadcasting stakeholders are represented through the Media Owners Association of Zambia (MOAZ) and the Zambia Independent Media Association (ZIMA), a non-governmental organisation dedicated to promoting media freedom and diversity in Zambia.

In 2019, Zambian film and TV practitioners united to establish the Professional Filmmakers Guild of Zambia, which aims to sensitise policy to create a propitious environment for the development of the industry, regulate actors’ remuneration, producer and cast engagement terms and conditions, pricing, and establish a funding portal.

FILM AND AUDIOVISUAL POLICY

The absence of a national film and broadcasting policy means that the procedure to follow in terms of financing and promotion remains to be defined. This has hindered the development of the sector in Zambia. In recent years the NAC, joined now by the Professional Filmmakers Guild of Zambia, has demanded for the establishment of a Film Commission and for the implementation of incentives such as a local content quota for broadcast, training opportunities, access to funding, and the promotion of Zambia as a film location. The NAC has also taken the lead in calling for a draft film policy, which is currently under review.

COPYRIGHT PROTECTION AND PIRACY

Zambia has a long intellectual property rights tradition and is the signatory to several international and local acts providing a legal framework for copyright protection. Zambia’s Copyright and Performance Rights Act of 1994 provides for the creation of Collecting Societies which operate under the direct supervision of the Patents and Companies Registration Agency (PACRA), under the Ministry of Commerce, Trade and Industry, while Copyright administration is the responsibility of the Ministry of Information and Broadcasting Services.

The Zambia Reprographic Rights Society (ZARRSO) is a Collecting Society representing authors, creators and publishers of literary and artistic works. ZARRSO licences reproductive rights, monitors their usage, and collects royalties on behalf of its members. The Zambia’s Music Copyright Protection Society (ZAMCOPS) is the regulating and collective management organisation in charge of the Music sector. These two organisations partially cover Copyright management for audiovisual works.

Despite this existing framework, implementation and enforcement of Copyright law remains a challenge in Zambia. Practitioners estimate that up to 75% of the revenue may be lost to piracy in the country.

PRODUCTION

Practitioners estimate that between 300-500 people are directly employed, and 1,000 indirectly employed, in Zambia’s film and audiovisual sectors. The large majority of Zambia’s audiovisual professionals are involved in the production of soaps and other programmes for the MultiChoice channel Zambezi Magic.

FILM

Cinema was introduced to large parts of East and Southern Africa, including Zambia (at the time Northern Rhodesia) in the 1930s. Through the Bantu Educational Kinema Experiment (BEKE), 35 low-quality educational films were made for an African audience and shown across the region with the help of a traveling mobile cinema van. After gaining independence in 1964, the Government-run Zambian Information Services (ZIS) continued with this tradition of mobile cinema and also produced several documentaries.
For the next 40 years or so, Zambia’s film output remained sparse. In 2011, Zambian-Welsh director Rungano Nyoni finally put the country on the map when her Zambia-shot fourth film, *Mwansa the Great*, was selected to screen at over 100 international film festivals and won more than 20 prizes. Nyoni went on to premiere her first feature-length fiction film, *I Am Not A Witch*, at the 2017 Cannes Film Festival’s Directors’ Fortnight,11 to win a BAFTA Award for Outstanding Debut.12

Other Zambian filmmakers are now walking in Nyoni’s footsteps, producing films that are getting noticed at film festivals worldwide. They include Jessie Chisi (*Between Rings*, 2014; *Imagination*, 2016; *Remedy*, 2020), Ngosa Chungu (*e18hteam*, 2014),13 and Peter Langmead (*Damyna the Musical*, 2016; *The Borderline*, 2019).14 Meanwhile, Zambia also sustains a significant cottage industry of filmmakers producing lower-cost, movies made for DVD or TV release. Today, practitioners estimate that between 3-5 feature films and 50-100 TV or DVD movies are produced in Zambia every year.

**TELEVISION AND VIDEO**

Most of Zambia’s estimated 50 or so production companies are involved in the production of local content for pay TV operator MultiChoice’s regional channel Zambezi Magic,15 which is being credited by some practitioners for sustaining the entire Zambian film industry. Launched in July 2015, Zambezi Magic caters for Zambian, Zimbabwean, Botswana, Etswatini, Lesotho and Namibian audiences with a majority of its programming sourced from Zambia. According to practitioners, Zambezi Magic has created steady employment in the country with up to 15 productions running simultaneously. Those mostly consist of long-running soaps and telenovelas, such as *Zuba* (Zambia’s first telenovela directed by Jessie Chisi), *Mungoma*, or *Mpali*.

Local Free-to-Air (FTA) stations such as the public broadcaster ZNBC and private channels Muvi TV, Power TV, QTV, or Diamond TV, have found it hard to compete with Zambezi Magic in terms of budget, sometimes offering filmmakers low remuneration and a revenue-share deal on advertising for a whole season. Still, FTA channels have also made efforts to support and broadcast local series such as *Maliposa, Banja*, or *Love Games Zambia*, which have proven very popular.

**DISTRIBUTION, EXHIBITION AND BROADCAST**

**CINEMA EXHIBITION**

NuMetro, Sterkinekor and Fresh View Cinemas operate a total of ten cinema screens in Zambia. In the past few years, cinema exhibitors have started showing local films alongside Hollywood movies to an increasingly enthusiastic audience.16 Practitioners estimate the current market share of local films in cinemas to remain low, however, at less than 10%.

**BROADCAST**

In Zambia, the penetration of TV sets reached around 37% of households in 2019. The channel reception consists primarily of digital terrestrial broadcast (DTT) as the analogue signal was shut down in 2017. The great majority of homes receive pay TV services and subscribe to MultiChoice’s DStv or GOnet, or competitor StarTimes’s Topstar17 (a joint venture between the Chinese operator and ZNBC). The Digital Migration Policy had provided for a minimum of 35% local content to be broadcasted under the digital television platform providing additional opportunities for the development of the film industry in Zambia.

Ministry of Information and Broadcasting Services is responsible for both Radio and Television Broadcasting Licensing as well as overseeing the Zambia National Broadcasting Corporation (ZNBC). The ZNBC is Zambia’s public broadcaster, operating three TV channels (ZNBC TV 1, 2 and 3). In addition, the country counts 18 licenced private broadcasters, including Muvi TV, Power TV, QTV, Covenant Broadcasting Company (CBC) and Fresh TV, operating a total of 22 channels.18 Among those, Muvi TV is by far the most popular. When it comes to pay TV, besides market leaders MultiChoice and TopStar, Viewsat, Platinum and City Channels are also available in the country.

**DIGITAL PLATFORMS**

Certain categories of low-cost Zambians films are sold in the streets on VCD or DVDs for about US$2 a copy by video distributors and sometimes by the filmmakers themselves. The distribution system is rife with piracy, with much of it being done in Lusaka’s notorious Matero township.19

Even though the business model for local VOD is still unclear, the advent of streaming is encroaching on Zambia’s DVD market, which is in the process of disappearing. Showmax (MultiChoice), Netflix, iROKOtv, Trace Play (Trace TV) and Amazon Prime Video are competing in Zambia’s still exceedingly small SVOD market. In addition, Tanzania-based web and mobile video app MPTV20 aims to offer a more localised approach. Mobile operators Airtel and MTN also offer video services.

**FUNDING SOURCES AND MECHANISMS**

There is very little public funding available for the creative industries in Zambia. The primary source of funding is the National Arts Council (NAC),21 which disburses grants through the Artist Development Fund, the Council’s Provincial Programmes, and the NAC’s affiliated associations. US$6,957.96 is the minimum amount for which a project/organisation can apply for. The maximum amount that can be applied for should not be in excess of US$34,789.78.22
The NAC has historically supported filmmakers through the National Association of Media Arts (NAMA), for example by providing financing to attend film festivals and training initiatives, encouraging the government to establish legislation in the sector, and creating tax exemptions for materials and equipment.

NGOs and development organisations such as USAID, or DFID, sporadically finance documentaries, films or TV series whose storylines are aligned with their programmatic goals. A handful of Zambian filmmakers with connections to Europe have also managed to raise soft funding from international sources. Examples include Zambian-Welsh director Rungano Nyoni, whose various projects have received funding from the UK, France, Germany and the Nordic Factory, and Finland-trained Jessie Chisi, whose 2014 documentary Between Rings was funded by the Finnish Film Foundation.

**PROMOTION**

Zambia counts a few film festivals, including the Lusaka International Film Festival, the Shungu Namutitima International Film Festival of Zambia, and the well-established Zambia Short Film Festival. Another opportunity for the promotion of the creative sector in Zambia are the Ngoma Awards, a celebration organised annually by the NAC, to honour artists in different fields such as visual arts, theater, comedy, media arts, creative writing, music and dance.

**EDUCATION AND TRAINING**

Except for the Zambia Institute of Mass Communications’ Diploma in Filmmaking, there are no public undergraduate university programmes dedicated to film or audiovisual studies in Zambia.

Some institutions propose related degrees, such as the University of Zambia, which offers Bachelor’s and Masters’ degrees in Media and Communication Studies and a Masters in Communication for Development. A few private institutions have developed training curriculums to cater to the film and audiovisual sector. The MultiChoice Talent Factory’s Zambia Academy, and the Kilimanjaro Film Institute, an NGO funded by the European Union’s ACP+ program, Plan, and Hivos, both offer certificates in film and audiovisual production. Meanwhile the Zambian Open University’s Bachelor of Fine Arts includes some courses on Film and Video. The Zambia Short Film Festival also runs a variety of short courses, workshops and masterclasses. However, practitioners consider that the educational programmes available in the country lack resources and technical depth, and are not sufficient to support the development of skilled film professionals.
NOTES

1. MIBS: Portfolio Functions https://www.mibs.gov.zm/?page_id=5223


3. Independent Broadcasting Authority: www.iba.org.zm/


8. Colonial Film: Beke Film http://www.colonialfilm.org.uk/production-company/bekefilm


10. IMDb: Mwansa the Great https://www.imdb.com/title/tt1756632/


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20. MPTV https://mp2tv.be/


27. IMDb: Between Rings https://www.imdb.com/title/tt3591462/

28. Lifm: Lusaka International Film Festival https://lifmf.com/

29. Facebook: Shungu Namutimia International Film Festival of Zambia https://www.facebook.com/ShunguNamutimiaInternationalFilmFestivalof-Zambia13919169435539/

30. Facebook: Zambia Short Fest - The Zambian Short Film Festival. https://www.facebook.com/ZambiaShortFest/


33. University of Zambia https://www.unza.zm/schools/humanities/departments


35. Facebook: Kilimanjaro Film Institute Zambia https://www.facebook.com/KilimanjaroFilmZambia/


37. Facebook: Zambia Short Fest - The Zambian Short Film Festival. https://www.facebook.com/ZambiaShortFest/
ZIMBABWE

This mapping was carried out on the basis of documentary research and data collected during a consultation with government representatives and interviews with various stakeholders.

INSTITUTIONAL FRAMEWORK

MAIN REPRESENTATIVE AND REGULATORY INSTITUTIONS

The film and audiovisual sector, and the creative industries in general, fall under the docket of the Ministry Youth, Sports, Arts and Recreation. The National Arts Council of Zimbabwe (NACZ) is the public body in charge of promoting and developing the arts sector by providing support, initiating arts programmes and forging partnerships with key stakeholders in the arts and culture sector. The NACZ’s National Annual Indabas on Arts and Culture gave birth to several strategic and policy documents that support the culture and creative industries and these include the Culture and Creative Industries (CCIs) strategy.

The Zimbabwean National Development Strategy 1 (NDS1) (2021 – 2025) prioritised arts and culture important for nation building to not only enhance the quality of life of people but also because it represents a leisure economy, which generates significant employment opportunities especially for the youths. The Censorship Board is in charge of regulating public entertainment, including approving films for exhibition or broadcast whilst the Broadcasting Authority of Zimbabwe (BAZ) regulates the broadcast sector, both falling under the Ministry of Information Publicity and Broadcasting Services.

The film and audiovisual sector include the 75% Local Content Matrices that support the culture and creative industries and these include the Culture and Creative Industries (CCIs) strategy.

The Zimbabwean National Development Strategy 1 (NDS1) (2021 – 2025) prioritised arts and culture important for nation building to not only enhance the quality of life of people but also because it represents a leisure economy, which generates significant employment opportunities especially for the youths. The Censorship Board is in charge of regulating public entertainment, including approving films for exhibition or broadcast whilst the Broadcasting Authority of Zimbabwe (BAZ) regulates the broadcast sector, both falling under the Ministry of Information Publicity and Broadcasting Services.

However, Zimbabwe does not have a Film Commission or any central body specifically dedicated to film. Filmmakers are currently accredited under "journalism", and the Ministry of Information is responsible for delivering film licences. When it comes to professional organisations, Women Filmmakers of Zimbabwe (WFOZ), established in 1996, is Zimbabwe’s leading women filmmakers’ association and the oldest functioning film institution in the country.

In 2014, film practitioners also started organising themselves in a membership-based, union-type structure called the Zimbabwe Film Industry Development Platform (ZFiDP), whose activities and discussions center on a WhatsApp group for information and administration on Facebook.

FILM AND AUDIOVISUAL POLICY

Zimbabwe’s National Constitution recognises the virtues of cultural identity and expressions including indigenous languages, and the National Arts, Culture and Heritage Policy developed in partnership with UNESCO officially launched in November 2019. In October 2020, the government launched the Cultural and Creative Industries Strategy (CCIS), which is a roadmap to guide the development of the CCI through ten pillars: cultural markets and business development; intellectual property; funding, financing and investment; education, capacity building and training; cultural infrastructure; cultural statistics and research; media, information and communication technologies; cultural diplomacy and global business; cultural governance; and safeguarding cultural heritage.

The Zimbabwean government is working to implement a pilot process for developing a music industry strategy, with the support of the EU/UNESCO project. The initiative, which kicked off in March 2020, is intended to serve as a template for the development of other industries in the future, notably film and visual arts. At the moment Zimbabwe does not have a film policy, any kind of film incentives or co-production treaties with any other country.

Other than that, existing policies directly or indirectly related to the film sector include the 75% Local Content Policy, implemented by the Zimbabwe Broadcasting Corporation, which aims to create opportunities for local artists by increasing the audience for their works, and the National Intellectual Property Policy, which seeks to strengthen the maintenance of legislation and raise awareness of Intellectual Property Rights (IPR) in the country.

The government is also currently studying a duty rebate facility managed by the Zimbabwe Revenue Authority (ZIMRA) to provide rebate of duty on music, sound, recording and broadcasting equipment imported by registered arts organisations. The Statutory Instrument gives preferential treatment to creators, producers and distributors in the music, film and broadcasting sectors to import equipment duty free.
Also being discussed are measures geared towards assuring the equal participation of women and men in cultural expressions (such as entry requirements in institutions of higher learning), and supporting the promotion and protection of the rights of women working in the arts and culture sector.\(^\text{13}\)

**COPYRIGHT PROTECTION AND PIRACY**

As discussed earlier in this document, piracy is a major issue in Zimbabwe, wiping out more than 75% of the potential revenue generated from creative goods, according to practitioners. The country’s new National Intellectual Property Policy and Implementation Strategy (2018) aims to counter the effects of piracy by promoting the rights of artists and other producers of cultural goods. The Policy, alongside the Copyright and Neighbouring Rights Act, empowers collecting societies like the Zimbabwe Music Rights Association (ZIMURA),\(^\text{13}\) the Reproduction Rights Organization of Zimbabwe, to act for owners of copyright in the management of their rights, represent owners of copyright in the negotiation and administration of licence schemes, and negotiate or grant licences either as owners or prospective owners of copyright. However, the level of IP awareness remains low in Zimbabwe among practitioners, enforcement officers, and the general public. The government of Zimbabwe through the Ministry of Higher and Tertiary Education, Science and Technology Development is in the process of setting up Incubation Hubs at select universities to promote IP education and research.\(^\text{14}\)

**PRODUCTION**

Due to persistent challenges with funding, distribution and monetisation, practitioners estimate that only about ten people live off of filmmaking full time in Zimbabwe, working in different capacities on a variety of projects, including documentaries, advertising, music videos, foreign shoots, and creative narrative films or television. However, the number of people employed partly or indirectly in the industry is likely much higher.

**FILM**

Film appeared in Zimbabwe in the 1930s. In the 1980s, the government of Zimbabwe, following the independence, launched a campaign to position the country as a location for foreign productions. Several Hollywood films, such as *King Solomon’s Mines* (1985), *Cry Freedom* (1987), *Mandela* (1987), *A World Apart* (1988), *White Hunter Black Heart* (1990) and *The Power of One* (1992), were shot in Zimbabwe during that time. For *Cry Freedom*, the Zimbabwean government entered into a partnership with Universal Pictures and contributed to the film’s budget. Although the experiment was not a financial success, it did contribute to showcase local actors and train local filmmakers.\(^\text{15}\)

Since then, the government has adopted a hands-off approach to its film industry. For the next decade, the main player became Media for Development International (MFDI),\(^\text{16}\) an American NGO headed by John and Louise Riber. MFDI funded the majority of feature and documentary films produced during that period including *Consequences*, *Neria*, *More Time*, *Everyone’s Child*, *Yellow Card*, *Choose Freedom*, *Mwanasikana*, *The Sharing Day*, *Ndodii*, *A Fighting Spirit* and *Faces of Aids*. Although these films were and still are considered high quality, they were also heavily message-driven and did little to reflect the diversity of the Zimbabwean experience. The evolving local audience eventually lost interest in the genre.

After the departure of MFDI from Zimbabwe in 2000, prominent novelist turned filmmaker Tsitsi Dangarembga and a few others managed to continue making films that shared some characteristics with the development films of the previous decade. However, institutional funding dried up. This coincided with the arrival of Nollywood films in Zimbabwe. The popularity of these films exposed the audience’s strong hunger for local content and inspired a new crop of Zimbabwean filmmakers (including Allan Muwani, Joe Njagu, Tawanda Gunda Mupengo, Patience Tawengwa, Solomon Maramba, Tafara Gondo, Rumbidzai Katedza, Yeukai Ndarimani, Tazaruwa, Shem Zemura and Von Tavaziva) to twist their business models towards lower budgets and higher production volumes. Taking advantage of the arrival of digital cameras and equipment, they started producing films on a shoestring and tackling a wider variety of subjects and genres.

In the past 15 years and despite the economic crisis, that segment of the film industry - sometimes called Zollywood - has exploded, with the production of films as different as comedy *Lobola* (2010), rags to riches story *Simbimbino* (2013), epic film *Zambezi* (2013), thriller *Fields of Gold* (2013), dark comedy *Something Nice from London* (2013), true story-inspired *Sinners?* (2013), horror movie *Life Back* (2013), action-packed *Go Chaniwa Go Reloaded* (2014), film noir *Escape* (2016), character drama *Kushata Kwemooyo* (2018), and war biopic *Chinhoyi 7* (2018). The success and impact of these films have remained mostly local, as few of them have made it to film festivals. In 2020, after a successful festival run in several countries, *Cook Off* dethroned *Neria* as the most well-known Zimbabwean film of all time when it was purchased by Netflix.

Today practitioners estimate that about 20 local feature films are produced every year in Zimbabwe, plus a dozen international projects, mostly wildlife documentaries.
Although the democratisation of filmmaking in Zimbabwe has been a positive evolution for the industry, it has not led to a palpable increase in the level of technical skills. Practitioners point to crucial gaps in areas such as screenwriting or sound recording for example. They estimate that at the moment Zimbabwe only has the equivalent of two professional crews, which means that no more than two quality projects could be shot in the country at the same time.

Industry stakeholders estimate that revenue sales from films generate US$2,000,000 annually.

TELEVISION AND VIDEO

The state-owned Zimbabwe Broadcasting Corporation (ZBC) is the only local television station in Zimbabwe. Some of the local programmes previously financed by ZBC have included the drama *The Mukadota Family*, the Shona language *Gringo Ndiani?*, the video music show *Mutinhimira we Mimhanzi* (later known as *Ezomgido*), the talk show *Madzinza e Zimbabwe*, the detective thriller *Go Chanaiwa Go*, the gospel music show *Psalmody*, and the local soap *Wenera - The Family That Matters*, created and directed by Eddie Ndhlovu. However, it seems that ZBC has not been in a position to commission or pre-buy any local films or series, and has reverted to a barter model in which producers are expected to pay for airtime to show their content. Pay TV operator MultiChoice has not provided any real recourse either, only sporadically sending out calls for made-for-TV movies for which they keep all the rights.

DISTRIBUTION, EXHIBITION AND BROADCAST

CINEMA EXHIBITION

Over the past 20 years, cinema attendance has been steadily declining, a consequence of the country’s prolonged economic crisis. Many theaters were forced to close, and several of them were converted into clothing shops and churches. Currently, Zimbabwe counts two multiplexes in Harare and one multiplex and one independent cinema in Bulawayo, for a total of 13 screens in the entire country. Zimbabwe’s main cinema exhibitor is the South African Ster Kinekor.

BROADCAST

In Zimbabwe, 56% of households had access to a TV set in 2019.17 The migration to digital terrestrial television (DTT) was completed in 2017. As mentioned earlier, public channel Zimbabwe Broadcasting Corporation (ZBC) is currently the only national TV station in the country, with a reach of about three million viewers, but coverage in rural areas is low due to poor infrastructure. In the pay TV segment, MultiChoice captures virtually 100% of the market, which is exclusively direct-to-home (DTH) satellite-based.

However, the Zimbabwean television sector is about to undergo a revolution. In June 2020, the government announced that six independent television channels were awarded licences as part of the movement to open up airwaves and implement media reforms. The Broadcasting Authority of Zimbabwe (BAZ) announced that 6 out of 14 licence applications were successful and that licences had been granted to ZTN, NRTV, 3K TV, Kumba TV, Channel D and Ke Yona TV. BAZ has given the new stations eighteen months to be operational and go on air or stand the risk of losing their licenses.18 By 2022, the Zimbabwean TV landscape will look markedly different.
**DIGITAL PLATFORMS**

The heyday of Zimbabwe’s DVD market lasted for a few years despite a major piracy problem, before the business model collapsed with the arrival of video streaming. However, the latter has not yet replaced the former in terms of reach nor revenue, as the development of online VOD in Zimbabwe remains constricted by the lack of payment methods, the low level of broadband penetration, and the cost of data. Showmax, Netflix, iROKOtv, Trace Play, Amazon Prime Video and Apple TV+ are technically available in Zimbabwe, even though subscriber numbers are likely very low. Locally, the website Zollywood Zimbabwe Movie partnered with the streaming service of mobile operator Telone Deod to offer local films through an all you-can-eat subscription or for rent.

In addition, social media platforms such as YouTube have changed the traditional distribution of short films in Zimbabwe. Independent creators are building value outside of traditional entertainment development platforms building their own audiences by using shortform content on free, low-barrier technologies like YouTube to directly access and build audiences. Examples include short series from Nash TV’s Wadiwa Wepamoyo and College Central’s Mukoma Nijo.

**FUNDING SOURCES AND MECHANISMS**

Immediately after independence in 1980, Zimbabwe’s government supported film development – partly through the promotion of the country as a Hollywood set – but changed this strategy after suffering financial losses. In the 1990s, a number of western-financed NGOs such as Media for Development International (MFDI) became the primary and often only source of funding for film. Zimbabwe’s most well-known movie, Neria, written by the novelist Tsitsi Dangarembga, was produced by MFDI in 1993. MFDI relocated from Zimbabwe to Tanzania in 2000.

For the past 20 years, due to the persistent absence of public or institutional funding, filmmakers have been developing hybrid models that mix various sources of funding or post-release revenue to finance their films. Filmmakers can sometimes access small grants from NGOs or from the Culture Fund of Zimbabwe Trust, a non-profit supported by the Swedish International Development Cooperation Agency (SIDA). In 2014 for example, the Culture Fund awarded a grant to the recently established Filmmakers Guild of Zimbabwe. Private investors are still reluctant to invest in the film industry, however some filmmakers have managed to raise brand or corporate sponsorships. The 2000 movie Yellow Card, also produced by MFDI, raised additional money from Air Zimbabwe, Barclays Bank and other sponsors, for example.

In the late 2000s and early 2010s, the emergence of a Nollywood-like DVD market in Zimbabwe allowed some filmmakers to generate profits by producing high volumes of DVDs and selling them quickly on the streets. For example, the hit movie Lobola, directed by Joe Njagu, ended up making its money back through a clever DVD distribution strategy, reaching 70,000 DVD sales in 2011. However, that business model was particularly vulnerable to piracy, which destroyed the profit potential of many popular films. In the past couple years, Zimbabwe’s DVD market has largely disappeared with the emergence of streaming. One can also cite the success of the romantic comedy Cook Off (2017), produced by Njagu. When Cook Off became the first Zimbabwean film to sell to Netflix, the producers were able to recover their costs and pay the entire team.

Profitability has not yet been consistently achieved and remains a pipe dream for many filmmakers. Although the creative industries in Zimbabwe contribute around US$100 million per year to the country’s GDP and employ 5.4 million people, according to a study produced by the Culture Fund in 2009, and despite some positive signs pointing to a hopeful future, the case for the commercial viability of Zimbabwe’s film sector is yet to be made.

**PROMOTION**

There are two major film festivals in Zimbabwe: the Zimbabwe International Film Festival (ZIFF), launched in 1998, and the International Images Film Festival for Women (IIFF) established in 2002 by Tsitsi Dangarembga as the first and only women’s film festival in Sub-Saharan Africa. IIFF is organised by Dangarembga’s Women Filmmakers of Zimbabwe association. IIFF and ZIFF have been instrumental in encouraging, promoting and showcasing Zimbabwean film production, including outside of Harare by organising screenings in places such as Bulawayo, Chimanimani, Mbare, Dzivarasekwa, Kambuzuma and Chitungwiza. However, both festivals have suffered from the lack of sustainable and consistent funding and have struggled to keep their activities going in recent years.
As part of its on-going policy-building efforts for the creative industries, Zimbabwe is introducing measures such as the mainstreaming of arts and culture education and training into the formal education system at all levels. Regarding filmmaking in particular, a few public education programmes cater to the audiovisual sector in Zimbabwe. Midlands State University offers a Bachelor’s degree in Film and Theater Arts Studies, which is considered the most relevant training programme by local practitioners. The University of Zimbabwe’s Theater Arts Department offers undergraduate and postgraduate degrees that include courses on film production and screenwriting, as well as short professional courses in film, radio and television production. Although less pertinent, the University’s English & Media Studies Department also offers undergraduate and postgraduate programmes in journalism and media. In addition, the Zimbabwe Film and Television School in Southern Africa (ZIFTESSA), which opened its doors in 2008 as an offshoot of a previous UNESCO-Zimbabwe Film & Video Training Project, is an arm of the Ministry of Media, Information and Publicity offering two-year diplomas in film and television production and directing, along with a range of short courses. Small, non-profit initiatives such as the Ibhayisikopo Film project, a women-driven film centre in Bulawayo, also try to bring film training to underserved groups.

Practitioners report that the past five years have seen a rise in the number of new film training programmes being created, but that the curriculums remain very theoretical across the board and need to be adopted to the practicalities of the field, with few students getting the opportunity to even hold a camera. Practitioners also note the multiplication of entry-level programmes while there is a lack of in-depth technical training, which is needed to upgrade the skills of working professionals to an international level.

NOTES

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Key dates in African cinema
Key dates in African cinema

By Olivier Barlet and Claude Forest
1896-1955: CINEMA IN THE COLONIAL PERIOD

As soon as the cinematograph was invented, operators were sent to Africa and all over the world to bring back distant and unusual images. In Africa as elsewhere, screenings were a great success and quickly became widespread, first in mobile form. Colonial cinema combined exoticism, ethnocentrism and propaganda (nature versus culture, savage versus civilized, group versus individual, belief versus science, etc.), and the films shown to local populations came essentially from the North. However, an industry began to be set up in certain countries, notably in Egypt and South Africa.

1895 • On-screen projections of "animated photographic views" by the Skladanowsky brothers in Berlin in November, and by the Lumière brothers in Paris in December.

1896 • Lumière operators shoot short films in Africa.
  • Projections in South Africa and Egypt.

1897 • Screenings at the Lumière Cinema in Tunis by Albert.
  • Screenings in Morocco.

1900 • Screening of the Lumière brothers’ L’Arroseur arrosé in a circus in Dakar.

1903 • Screenings in Nigeria.

1910 • Independence of South Africa and first film (silent, now lost): The Great Kimberley Diamond Robbery / The Star of the South (15’, director unknown).

1911 • 8 cinemas in Cairo, 3 in Alexandria.

1914 • 7 "theatre-cinemas" in Algiers, 12 theatres in 1920, 40 in 1939.

1916-1922 • Production in South Africa of 37 fiction films by the African Film Production of the American businessman Isadore W. Schlesinger, who also set up the Killarney Film Studios in Johannesburg.

1922 • First Tunisian short fiction film: Zohra by Albert Samama-Chikli (35’), a tribute to the Bedouins.
  • The Independence of Egypt, which becomes a kingdom, and first short fiction film in Barsoum Looking for a Job, a comedy by Mohamed Bayoumi (12’) promoting tolerance between Muslims and Copts.

1923 • First experimental radio broadcast in Johannesburg, South Africa.

1924 • Cinema theatres in Casablanca, then in Rabat.

1930 • 755 cinemas in Africa. This number would rise to 1683 in 1951, then 2168 in 1960, mainly in North Africa.
  • First adaptation of an Egyptian novel: Zeinab by Mohamed Karim, based on the populist novel by Mohamed Hussain Heykel Pacha (talking version in 1952, 120’).

1931-1940 • Nigeria’s Health Propaganda Unit: a mobile educational cinema test, supervised by William Sellers.

1933 • Inauguration of the Majestic in Algiers, the largest cinema in Africa: 3500 seats.


1934 • France: the “Laval” decree aimed at controlling musical and cinematographic works recorded in French-speaking West Africa.

1935 • Creation of the Misr Studios by the Misr Bank in Cairo to bolster national identity and oppose the British occupiers: 50 to 80 musicals, melodramas and comedies per year, using famous actors. Nationalization in 1961.

1935-1940 • Development of travelling educational film shows in the British colonies, screening films whose production remains based in London.

1936 • Establishment of a “Commission for the control of films for natives” in the Belgian Congo.

• Nationalization in South Africa of Isidore William Schlesinger’s broadcasting stations under the name of South African Broadcasting Corporation.

1937 • The Malagasy deacon Philippe Raberojo shoots a docudrama in 9/5 mm, The Death of Rasalama (22’), on the occasion of the centenary of the death of the Malagasy Protestant martyr Rasalama.

• Creation of a censorship board in Nigeria.

1939 • The Will (Al Azima), by Kamal Selim (Egypt): without song or dance, a populist realist work on the urban middle class affected by the economic crisis.
  • Algeria has 188 cinemas, Morocco 56, Tunisia 47.

1940 • The British government’s creation of the Colonial Film Unit (CFU) to adapt educational screenings (mobile cinema with interpreters) and support the Western war effort.

1944 • Creation of the Moroccan Film Center (CCM).

1945 • Salah Abou Seif, father of Egyptian realist cinema, makes his first feature film. Like Youssef Chahine, he would go on to collaborate with the writer Naghib Mahfouz, winner of the 1988 Nobel Prize, who played a major role in the renewal of themes.

1946 • 64 films are shot in Egypt; 1946-60: golden age of Egyptian cinema, which shines throughout the Arab world.

1948 • Creation of the Gold Coast Film Unit (now Ghana) with a training unit for Africans.


1951 • Libyan Independence.

1953 • Guinea: Mamadou Touré shoots Mouramani (23’), a tale about a king.
**1955-1982: THE CINEMA OF DECOLONIZATION**

*With Independence, African filmmakers emerge and seek to group together in a Federation. The time had come for pan-Africanism, which the festivals created in Tunis and Ouagadougou made a reality. The challenge was to decolonize screens as much as minds, but the economic and political stakes were high.*

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1955  
*Afrique sur Seine*, directed in Paris by the Senegalese Paulin Soumanou Vieyra and Mamadou Sarr (21'). It is often mistakenly considered the first sub-Saharan African film, but its claim to the equality of human beings makes it an inaugural manifesto.

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1956  
Independence of Morocco, Tunisia and Sudan.  
The Schlesinger monopoly in South Africa is broken up by the appearance of Jamie Uys, the first independent director who would go on to meet world success with the racist comedy *The Gods Must Be Crazy* (1980, 100').

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1957  
Independence of Ghana. Creation of the Ghana Film Industry Corporation (GFCI), with excellent facilities, based on the Gold Coast Film Unit created in 1948.  
Creation of SATPEC, a Tunisian limited company for film production and expansion.  
Decree promulgating taxes to support cinema in Egypt and creation of the Film Support Organization.

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1958  
Guinean Independence.  
Youssef Chahine causes a scandal in Egypt with *Gare centrale* (76') which was banned for two years. Chahine plays an erotomaniac destitute man with a limp.  
First Moroccan feature film, *Le Fils maudit* by Mohamed Ousfour (50'): his parents’ neglect leads the son to delinquency and crime.

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1959  
*Come Back Africa*, by Lionel Rogosin (USA, 95'), first feature film shot in South Africa denouncing the condition of the Black population.  
First television channel in Nigeria: Western Nigerian Television (WNTV) in Ibadan.  
Guinea nationalizes the importation and distribution of films.  
Opening of the Higher Institute of Cinema in Egypt.

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1960  
First Egyptian national television channel.

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1961  
Partial nationalization of the Egyptian film industry.  
Independence of Sierra Leone and Tanzania.

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1962  
Successive independences of: Rwanda, Burundi, Algeria, Uganda.  
Creation of the Malian Film Office.

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1963  
32 States create the Organization of African Unity (OAU), which adopts the principle of inviolability of borders (1964).  
According to Paulin Soumanou Vieyra, the number of cinemas is: South African Union 368; Nigeria 82; Senegal 65; Ivory Coast 50; Tanganyika 45; Ethiopia 40; Libya 40; Mozambique 35; Congo-Brazzaville 32; Congo-Leopoldville 30; Somalia 27; Madagascar 27; Angola 20; Mali 19; Uganda 18; Cameroon 15; Sierra Leone 11; Upper Volta 7; Chad 6; Niger 5...

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1964  
Independence of Malawi and Zambia.  
Creation of the Algerian National Film Center (CNCA).  
Creation of the amateur film festival in Kélibia, Tunisia.  
Independence of the Gambia.

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1965  
*The Dawn of the Damned* by Algerian Ahmed Rachedi (100’): for a demystified history of Africa and against racism.

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1966  
Independence of Botswana and Lesotho.  
World Festival of Black Arts in Dakar.  
First Carthage Film Festival (CFF) created by the Tunisian Ministry of Culture under the impetus of Tahar Cherkaa. Golden Tanit Award: *Black Girl* by Ousmane Sembène, the first feature film from Senegal (65’; a 55’ version had been shortened to be registered in France), on the journey of a maid, portraying the cruelty of class contempt.  
*The Battle of Algiers* by Gillo Pontecorvo (121’): Algerian-Italian epic film that became cult through its portrait of Brahim Hadjadj (Ali la Pointe).
* The Wind of the Aurès by Mohamed Lakhdar-Hamina (Algeria, 90’): about the war of liberation; First Film Prize at the Cannes festival.
* Le Sergent Bakary Woolen by Mohamed Lamine Akin (100’), first feature film in Guinea, against forced marriage.

1967
* Creation in Guinea of the state-run Syli-Cinéma, which serves as the National Film Center.
* Dissolution of the National Center of Algerian Cinema (CNCA), replaced by the Algerian Cinematography Center (CAC) and the National Office for Cinema Trade and Industry (ONCIC, shut down in 1984). Establishment of the Fund for the Development of Art, Technique and Cinematographic Industry.

1968
* Independence of Mauritius, Swaziland and Equatorial Guinea.
* Sam Arieetey directs the first Ghanaian feature film: No Tears for Ananse, adapted from a folk tale about a peasant facing his family. The following year, he takes over the direction of the GFIC.
* Creation in Guinea of the state-run Syli-Cinéma, which serves as the National Film Center.
* Dissolution of the National Center of Algerian Cinema (CNCA), replaced by the Algerian Cinematography Center (CAC) and the National Office for Cinema Trade and Industry (ONCIC, shut down in 1984). Establishment of the Fund for the Development of Art, Technique and Cinematographic Industry.

1969
* February 1st to 15th, First African Film Festival in 1969.
* Le Sergent Bakary Woolen by Mohamed Lamine Akin (100’), first feature film in Guinea, against forced marriage.

1970
* 306 cinemas in French-speaking Africa, including 119 owned and 130 programmed by SECMA and COMACICO, which dominate the importation and distribution of films in French-speaking Africa. The number of cinemas would increase to 328 in 1980, and then decrease: 138 in 2000, 49 in 2015.
* Nationalization in January in Upper Volta of six cinemas programmed by the COMACICO and the SECMA. Creation of the National Voltaic Film Company (SONAVOCI) to continue to have films distributed by these two companies and to create new cinemas (it would become the National Company of exploitation and cinematographic distribution of Burkina, SONACIB, when the country changed its name in 1984). 10% of its revenues go to the Voltaic Film Development Fund which would produce the country’s first feature-length fiction film, Le Sang des parias by Mamadou Djim Kola (1971, 90’), about an impossible marriage to a young man from the blacksmiths’ caste.
* From February 1st to 15th, second African Film Festival in Ouagadougou. A resolution of the filmmakers (Pan-African Cinema Union) is signed to maintain the headquarters of the festival in Ouagadougou.
* Hamid Bénani shoots Wechma (100’), which opens new narrative techniques in Moroccan cinema.
* The 3rd CFF awards their Golden Tanit to the Egyptian Youssef Chahine for his entire body of work and for Le Choix (110’), a film about ambient schizophrenia.
* Nationalization of the COMACICO cinemas in Mali, entrusted to the OCINAM (National Cinematographic Office of Mali) created in 1962.
* Back from his film studies in Moscow, Souleymane Cissé is employed by the Film Service of the Ministry of Information of Mali (SCINFOMA, created in 1966 to take over the production section of OCINAM and replaced by the CNPC in 1977) for which he would shoot 30 newsreels and 5 documentaries. He made Five Days in a Life (50’) in Bambara in 1971 about a young thief. The film receives a bronze Tanit at the 1972 CFF.
* With Soleil Ô (102’), Med Hondo directs the first Mauritanian feature film in Paris, where racism and humiliation drive an immigrant to madness.

1971
* Les Tams tams se sont tus by Philippe Mory (80’), the first Gabonese feature film: a man seduces his uncle’s young wife; he tries to shoot the lovers, as is the custom.
* Kodou, on the strength of traditions (89’), first feature film by Senegalese Ababacar Samb Makharam, who would head the Pan-African Federation of Filmmakers from 1972 to 1976.
* Emitai (103’), first historical film by Ousmane Sembène and indictment against colonialism.

1972
* The Indigenization Decree transfers ownership of 300 cinemas to Nigerians, but they continue to show American films, even with the creation of the National Film Distribution Company in 1981.

* 3rd Fespaco - the organizing committee becomes national, segregationist states are boycotted but the ANC is now invited, represented by filmmaker Lionel Ngakane; Stallion of Yennenga: Le Wazzou polygame by Oumarou Ganda (Niger), on polygamy as a religious hypocrisy.


* FVVA: Femmes Voitures Villas Argent by Mustapha Alassane (68'), first feature film by a Nigerien, where this mirage leads to prison.

* The 4th CFF Golden Tanit is attributed ex-aequo to The Dupes by Egyptian Tewfik Saleh (107'), about the tragic emigration of Palestinians, and Sambizanga by Guadeloupean Sarah Maldoror (102'), a political drama of the struggle for independence from Angola.

* 40 screens in Madagascar, reduced to 11 in 2007.

1973

* Independence of Guinea-Bissau.

* Innovative and subversive, Touki bouki by Djibril Diop Mambety (Senegal, 87') opens a new aesthetic and thematic path. Anta embarks for France while Mory refuses this mirage.

* 4th Fespaco - liberation movements such as FRELIMO, MPLA, PAIGC are invited; Theme: The role of cinema in the awakening of an awareness of black civilization. Stallion of Yennenga Award: A Thousand and One Hands by Moroccan Andrée Davanture, where a traditional marriage incurs the anger of the divinities.

* Seminar of the Agency for Cultural and Technical Cooperation (ACCT) in Ouagadougou on “the role of the African filmmaker in the awakening of an awareness of black civilization”, which gives as much importance to form as to substance.


* Nationalization of cinemas and creation of the National Film Office of Dahomey (privatization and dissolution in 1988).

* Creation of the pan-African company CIDC (Inter-African Cinema Distribution Consortium) and CIPROFILM (Inter-African Film Production Center), the principle of which had been decided by Common African and Malagasy Organization (OCAM) in 1970.

1974

* Very remby, le retour by Ignace Solo Randrasana (88'), Madagascar’s first feature film, a documentary about a family fleeing urban misery in the hope of a better life.

* Under the Sign of Voodoo by Pascal Abikanlou (100'), first feature film from Dahomey and first African film edited by André Davanture, where a traditional marriage incurs the anger of the divinities.

* Walanda: la leçon (90'), Mali’s first feature film in which the writer Alkaly Kaba adapts his own novel: a young village girl and a rich city dweller are too different for their union to work.

* Senegalese Samba Félix Ndiaye makes his first documentary Pérantial (30') and would go on to shoot about fifteen of them up until his death in 2009.

* Creation of the Somali Film Agency.

* Nationalization of cinemas and film importation in Mozambique, Cape Verde, Comoros, Sao Tome and Principe, Angola.

* Creation of the National Cinema Institute (INC) in Mozambique, which would produce the film journal Kuxa Kanema, distributed via mobile cinemas.

* Creation of the Gabonese Cinema Center (CENACI), directed by Philippe Mory, who would also later chair the Gabonese Filmmakers Association (ACG) in 1981.

* Malian Souleymane Cissé shoots the drama Den Muso (The Young Girl) (86') to denounce the rejection of teenage mothers. Wrongly accused of embezzlement, Cissé is imprisoned for 10 days and the film is banned for three years.

* Letter from My Village (Kaddu Beykat) by Senegalese Saï Faye (98'), the first feature film by a French-speaking African director, on the economic problems of the rural world.

* Creation of the Somali Film Agency.

* Nationalization of cinema and film importation in Madagascar.

* The Cannes Film Festival Palme d’Or goes to Chronicle of the Years of Fire by Mohammed Lakhdar-Hamina (157'): history of Algeria from 1939 to 1954, expropriation of land and deculturation.
* The second FEPACI Congress adopts the “Algiers Charter”, anti-imperialist and pan Africanist.
* Nigerian Ola Balogun shoots Ajani-Ogun, musical and popular, first adaptation of Yoruba theatre on the screen, with Ade Folayan, who will himself become director.

1976

* Ceddo (120’), the second historical film by Ousmane Sembène, shows popular resistance against religious oppression. Banned until 1984 by President Léopold Sédar Senghor under the pretext that Ceddo should only take one “d”!
* Independence of the Seychelles.
* Omar Gatlato Ceddo grant to gain their place in society.
* 5th Fespace - postponed due to the armed conflict with Mali, an organizational fiasco but a public success, Theme: The African filmmaker of the future: educational involvement.
* Stallion of Yennenga: Muna Moto (The Child of the Other) by Cameroonian Jean-Pierre Dikongué Pipa (89’), in which a love marriage is prevented by the tradition of the dowry.
* Creation of the African Institute for Film Studies (INAFC) in Ouagadougou, partly financed by UNESCO for ten years, with an inter-African vocation (closed in 1987).
* Single television channel in South Africa after the government hesitated to create one for white and one for black people.
* The 6th CFF Golden Tanit Award goes to Les Aventures d’un héros by Ade Folayan, who will himself become director.

1977

* Independence of Djibouti.
* Creation in Upper Volta of the National Center of Cinematography, which would notably later produce the film of its director Gaston Kaboré: Wend Kuuni (1982, 75’), a timeless tale about a child who regains his voice.
* Creation in Mali of the National Film Production Center (CNPC), also in charge of censorship.
* The military in power in Nigeria creates the National Television Authority (NTA), the sole guardian of the nationalized regional stations.
* Cameroonian Jean-Pierre Dikongué Pipa shoots Le Prix de la liberté (93’) on the sexual favors that African women must grant to gain their place in society.
* The 7th CFF Golden Tanit Award: Les Aventures d’un héros by Merzak Allouache (Algeria, 134’), on the destiny of a child in the Sahara.

1978

* Creation of the National Film Production Center (CNPC), also in charge of censorship.
* The military in power in Nigeria creates the National Television Authority (NTA), the sole guardian of the nationalized regional stations.

1979

* 6th Fespace, from now on held every odd year to alternate with the CFF; Theme: The role of the African film critic.
* Stallion of Yennenga Award: Baara by Souleymane Cissé (91’), denouncing the collusion between economics and politics. The film marks a turning point by tackling the question of demands and trade unions in an urban environment.
* Creation in Ouagadougou of the African Cinema Society (CINAFRIC) by Martial Ouédraogo with the help of the state: film studio and post-production tools. The complex would never be completed and the company closed five years later.
* Sale of the SOPACIA cinemas to the Gabonese State. SOPACIA becomes the UAC (African Cinema Union) and limits itself to the role of central purchasing agency for films on behalf of the CIDC and the SIDEC.
* Creation of the Durban International Film Festival (South Africa).
* Creation of the Nigerian Film Corporation, for the construction of a 160 ha industrial complex near Jos, which provided from 1985 to 1989 a laboratory, national archives, technical assistance but produced only ten documentaries.

1980

* Independence of Zimbabwe.
* Closure of the editing unit of the French Film Office.
* Creation of ATRIA, headed by the editor Andrée Davanture (closed in 1999 following the end of state subsidies).
* The 8th CFF Golden Tanit Award: Aziza by Abdellatif Ben Ammar (100’), on the changes in urban Tunisia.
* Creation of a fund to support production in Morocco, managed by the CCM.

1981

* Creation of the Marrakech International Film Festival, the best endowed festival in Morocco.
* Moroccan Ahmed El Mañouni shoots Trances (86’), a docudrama that became cult with the group Nass El Ghiwane.
* The first Chanaian independent film, Love Brewed in an African Pot by Kwaw Ansah (Ghana, 125’), a romance in English set in colonial Ghana; is a huge popular success in English-speaking Africa.
* Creation of the Egyptian Film Fund.
* 7th Fespace; Theme: Production and distribution. Stallion of Yennenga: Djeli by Fadika Kramo-Lanciné (Côte d’Ivoire), on love in the face of caste oppositions.
* Creation of the filmmakers’ collective L’Oeil vert vaiming to break away from the hold of France and Europe.
* Creation of the Pan African Film Symposium (Mogpafis) in Mogadishu (Somalia), biennial.
**1982-1998: MARKET ECONOMY AND INDIVIDUALIZATION**

Nationalizations had limited the freedom of filmmakers and the international distribution of their films. All over Africa South of the Sahara, states were losing interest in the film industry both financially and in terms of regulations; these were about to collapse and disappear in most countries. The failure of the attempts of the rare trans-African structures revealed national egotism, the predation of a few actors, and favored short-term visions. Filmmakers were gradually abandoning pan-African ideals and turning to the market economy, while collective conscientization was giving way to novelistic introspection.

1982  
- The 9th CFF Golden Tanit Award to *Finyè (The Wind)* by Malian Souleymane Cissé (107’), about two teenagers from different backgrounds in revolt against the authorities.
- Colloquium on film production in Africa held in Niamey, which leads to a manifesto proposing, among other things, a market for African cinema, which the Fespaco would create in 1983 (it becomes the MICA in 1987).

1983  
- The Cameroonian Jean-Marie Teno makes his first documentary *Schubbaah* (15’), marking the beginning of a great career as a self-produced documentary filmmaker.
- 8th Fespaco; Theme: African filmmaker before of their audiences. The Stallion of Yennenga, presented by Thomas Sankara, then Prime Minister, also goes to *Finyè* by Souleymane Cissé, who wins his 2nd Gold Stallion.
- *My Country, My Hat*, a thriller documentary by David Bensusan (84’), describes the suffering caused by South Africa’s pass laws.

1984  
- The 10th CFF Golden Tanit: Dreams of the City (120’) by Mohamed Malas, renovator of Syrian cinema.
- Bankruptcy of the pan-African companies CIDC (Inter-African Film Distribution Consortium) and CIFROFILM (Inter-African Film Production Center) 1984 - *Yeelen (The light)* by Malian Souleymane Cissé (104’), a son’s initiatory journey to possess the magical powers his father jealously holds, is the first feature film by an African from South of the Sahara to be awarded at the Cannes Film Festival.

1985  
- 9th Fespaco – takes a revolutionary turn; the filmmakers participate symbolically in the “Battle of the railroad”; opening up to the diaspora (out of competition). Theme: Cinema and people’s liberation - Colloquium: Literature and African cinema. Stallion of Yennenga: *History of a Meeting* by Brahim Tsaki (Algeria), on North/South relations. 3rd FEPACI Congress, known as “the Renaissance”.
- A crossed portrait of three women, *Visages de femmes* by Ivoran Désiré Ecaré (105’) is banned for one year for obscenity, which gives him enormous publicity.

1986  
- The 11th CFF Golden Tanit: *Man of Ashes* by Nouri Bouzid (Tunisia, 148’), about the trauma of two raped boys.
- *Yam Daabo* by Burkinabe Idrissa Ouedraogo (80’) marks a new type of narrative, close to the novel.
- Creation of the African Film Week in Nairobi (Kenya).

1987  
- With *Tabataba* (90’), Raymond Rajaonarivelo denounces the repression of the Malagasy insurrection of 1947.
- 10th Fespaco - integration of the “diaspora” competition with the Paul Robeson prize as well as the “television and video” competition, and a more assertive opening to English-speaking countries. Theme: Cinema and cultural identity - Colloquium: Oral tradition and new media. Stallion of Yennenga: *Sarraounia* by Med Hondo (Mauritania/Burkina Faso/Canada), on a queen fighting against colonialism.
- The *Camp at Thiaroye* by Ousmane Sembène and Thierno Faty Sow (150’) evokes the massacre of the colonial infatrymen who demanded the full payment of their war indemnities. A successful co-production between Algeria, Tunisia and Senegal, the film won the Grand Jury Prize at Venice and at the CFF.
- Production aid fund in Morocco.

1988  
- *Ball in the Dust* by Henri Duparc (91’); about polygamy, marks the birth of the “African-style comedy”.
- With *Mortu Nega* (85’), the Bissau-Guinean Flora Gomes highlights the continuity between the anti-colonial struggle and the struggle for development.
- With *Yaaba* (90’), the initiatory journey of two children who learn to overcome prejudices, the Burkinabè Idrissa Ouedraogo makes an ode to tolerance. Senegalese Djibril Diop Mambety documents the filming with *Let’s Talk Grandmother* (34’).

1989  
- 11th Fespaco, partially boycotted by filmmakers after the assassination of Thomas Sankara; Theme: Cinema and economic development - Colloquium: Cinema women and poverty. Stallion of Yennenga: *Heritage Africa* by Chanaian Kwaw Ansh (125’), on the alienation of the colonized.
- Creation of the Cinémathèque africaine in Ouagadougou, under the supervision of the Fespaco (flooded in 2009).

1990  
- Independence of Namibia.
- 13th CFF Golden Tanit: *Halfaouine, Boy of the Terraces* by Tunisian Ferid Bougkedir (95’), about a young man torn between the worlds of men and women.

1991  
- 12th Fespaco; Theme: Cinema and Environment - Colloquium: Partnership and African Cinema. Stallion of Yennenga: *Tilaï* by Burkinabè Idrissa Ouedraogo (81’), a tragedy that questions the relationship to tradition.
• **Hyenas** (110’) marks the return of Senegalese Djibril Diop Mambety: adaptation of Friedrich Dürrenmatt’s *The Visit of the Old Lady*, about the greed of the hyenas that men have become.

• The comedy **Gito the Ungrateful** by Leonce Ngabo (90’) is Burundi’s first feature film, about a black man torn between a white and a black woman.

1991 to 1995


1992

• **Kawilasi – Sabi, la mort et moi** by Blaise Kilouzou Abalo (90’), Togo’s first feature film, investigates an enigmatic murder.

• With **Black Light** (103’) Mauritanian Med Hondo adapts a novel by French author Didier Daeninckx about the links between a crime and the deportation of 101 Malians from France.

• Nigeria: the ruin of the economy prevents filming and insecurity leads to the closure of 101 Malians from France.

• With **Guelwaar** (111’), Sembène Ousmane calls to rely only on one’s own strength to attain dignity.

1993

• Independence of Eritrea.

• 13th Fespaco; Theme: Cinema and liberties - Colloquium: Cinema and children’s rights. Stallion of Yennenga: **Au nom du Christ** by Ivorian Gnoan Roger M’Bala (90’), who humorously evokes the proliferation of sects.

1994

• Creation of the Rabat International Festival of auteur cinema (Morocco).

• 15th CFF Golden Tanit: **The Silence of the Palaces** by Tunisian Moufida Tlatli (124’), harsh memories of the servants of the Bey.

1995

• 14th Fespaco; Theme: Cinema and African History. Stallion of Yennenga: **Guimba** by Malian Cheick Oumar Sissoko (94’), about the rise and fall of a cruel despot.

1996

• Creation in Cape Town of the Sithengi Film & Television Market (until 2006).

• Tsitsi Dangarembga directs **Everyone’s Child** about children in poverty (90’), the first feature film directed by a black Zimbabwean woman.

• Ghana sells 70% of GFIC’s shares to a Malaysian television production company. Collapse of the film industry, replaced by video (“Gollywood” for English-language films, “Kumawood” for Twi films). The phenomenon of video production in local languages can be found in Kenya (“Riverwood”), Tanzania (“Swahiliwood” and “Bongowood”), and in the Somali diaspora (“Somaliwood”).

• **Fools** by Ramadan Suleman (90’), about the perpetrator of an unpunished rape, is the first feature film made by a black South African after apartheid (Thomas Mogotlane had co-written **Mapantsula** by Oliver Schmitz in 1988).

• 16th CFF Golden Tanit: **Salut cousin** by Algerian Merzak Allouache (98’), about a young man caught between the straitjacket of Algerian society and the harshness of life in Paris.

1997

• 15th Fespaco: Theme: Cinema, childhood, and youth. Stallion of Yennenga: **Buud Yam** (97’) where Burkinabé Gaston Kaboré explores the quest for identity, giving, link in tales, a sequel to **Wend Kuuni** (1982).

• Youssef Chahine presents his 33rd film **Destiny** (135’) at the Cannes Film Festival. He receives the 50th anniversary prize for his entire work.

• First edition of the Ecrans Noirs festival in Yaoundé.

• National Film and Video Foundation Act in South Africa, which sets up two public funds to support cinema and video and promotes diversity. At the same time, the Ster-Kinekor and NU Metro duopoly, integrated groups that dominate distribution, start building multiplexes.

1998

• First edition of the Zanzibar International Film Festival (ZIFF), with a focus on **Maangamizi: The Ancient One** by Tanzanian Martin Mhando and American Ron Mulvihill (110’), a confrontation between Western psychiatry and East African spirituality.

• The 17th CFF Golden Tanit: **Vivre au paradis** by Bourlem Guerdjou (105’), on the hard life of immigrants in France during the Algerian war.

• The African Guild of Directors and Producers, which develops the solidarity of filmmakers, publishes a newsletter and criticizes existing practices.
SINCE 1998: AESTHETIC RENEWAL AND DIGITAL AND DIGITAL REVOLUTION

A new generation of directors proposes a radical thematic and aesthetic renewal, while digital technology gradually eases technical and financial constraints, allowing a broadening of production and promoting the circulation of films, but blurring the boundaries between the different cinematographic and audiovisual forms. The English-speaking Africa shows a dynamism following a Nigeria that becomes one of the first world producers of (video) films.

1998  * With *Bye Bye Africa* (86'), Mahamat-Saleh Haroun directs the first Chadian feature film and a manifesto for a new cinema. With *Life on Earth* (61'), Mauritanian Abderrahmane Sissako also proposes a new positioning in the world.

1999  * 16th Fespaco, in a country electrified by the assassination of journalist Norbert Zongo; Theme: Cinema and distribution channels in Africa. Stallion of Yennenga: *Identity Pieces* by Congolese Ngangura Mweeze (93'), where an African king in search of his daughter discovers the diversity of the inhabitants of Brussels.

2000  * Creation of the Namibia Film Commission.
  * With *Faat Kiné* (90'), a portrait of women from three generations, Ousmane Sembène defends equal rights for men and women.
  * 18th CFF Golden Tanit: *Dolé* by Gabonese Imunga Ivanga (92'), on a gang of kids facing the seductive power of money.

  * Creation in Cameroon of the annual trust account that finances culture.

2002  * 19th CFF Golden Tanit: The Price of Forgiveness by Senegalese Mansour Sora Wade (90'), a fable about the consequences of jealousy.
  * Opening of the first multiplex in Moroccoin Casablanca under the name of Megarama, with about fifty screens in six locations in Morocco by 2020, and a distribution subsidiary covering a third of the market.
  * Establishment of the Fund for the Promotion of the Film and Audiovisual Industry (FOPICA) in Senegal (endowment in 2014).

2003  * 18th Fespaco; Theme: The actor in the creation and promotion of African film; Stallion of Yennenga: *Waiting for Happiness (Heremakono)* by Mauritanian Abderrahmane Sissako (95'), where a young man who does not speak the language tries to decipher the universe around him.
  * A manifesto against female genital cutting, *Moolaadé* (117') is the last work of Sembène Ousmane, called “the elder of the elders”, who died in 2007.

2004  * In an African court, a lawsuit against the World Bank and the International Monetary Fund is held: it is *Bamako* by Mauritanian Abderrahmane Sissako (118'), which meets with worldwide success.
  * Reappearance of movie theatres in Nigeria: Silverbird multiplexes in shopping centers, based on the South African model.
  * Privatization after the bankruptcy of SONACIB, taken over by Idrissa Ouedraogo’s ARPA (Association of African Directors and Producers), but failure and sale of the cinemas in 2006.
  * 20th CFF Golden Tanit: *In Casablanca, Angels Don’t Fly* by Moroccan Mohamed Asli (97'), on the torments of the rural exodus.
  * Creation during the CFF of the African Federation of Film Critics (africine.org).

2005  * 19th Fespaco; Theme: Training and professionalization issues. Two other Stallions are awarded (silver and bronze) so that Stallion of Yennenga becomes the Golden Stallion, awarded to *Drum* by South-African Zola Maseko (104'), a portrait of a black journalist in Sophiatown.
  * International success for South African films: *U-Carmen ekhaya*lisha, a musical drama by Mark Dornford-May (120'), wins the Golden Bear at the Berlinale. In 2006, *My Name is Tsotsi*, a social thriller by Gavin Hood (94'), wins the Academy Award for Best Foreign Language Film.

  * *Irapada* by Kunle Afolayan (120'), a supernatural thriller in Yoruba, is the first film of the Nigerian New Wave, “New Nollywood", which shoots on film with more investments and sponsors. The government and Ecobank’s "Project Nollywood" fund supports the production of quality films.
  * First Rencontres du Film court in Antananarivo.

2007  * 20th Fespaco; Theme, festival and colloquium: African cinema and cultural diversity
  * Nollywood encounters an overproduction crisis (2700 video films released during the year): a lack of creativity, piracy, the internet, and competition from specialized channels undermine films’ profitability.

2008  * Creation of the National Film Office of Côte d’Ivoire (ONACCI) and a support fund for the film industry (FONSIC).
  * Creation of the Niger National Film Center.
  * The 22nd CFF Golden Tanit goes to *Teza* by Haile Gerima (140'), allegory about the traumas of the Ethiopian civil war.

• A Screaming Man by Mahamat-Saleh Haroun (100’), about an Africa torn apart by its murderous contradictions, is the first African film in 12 years to be in official competition at the Cannes Film Festival, where it wins the Jury Prize.

2010
• The Organisation Internationale de la Francophonie (OIF) announces that it is funding a feasibility study for a Pan-African Film and Audiovisual Fund (FPCA) to be managed by the Pan-African Federation of Filmmakers (FEPACI), but after five years’ work, it will never see the light of day.
• The 23rd CFF Golden Tanit: Microphone by Egyptian Ahmad Abdalla (120’), where a young man rubs shoulders with the underground art scene in Alexandria.
• Ster-Kinekor builds a first multiplex (six screens) in Lesotho. It opens others in Namibia, Zambia, and Zimbabwe.

2011
• 22nd Fespaco; Theme: African Cinema and Markets. Golden Stallion: Pegasus by Moroccan Mohamed Mouftakir (104’), where a psychiatrist tries to pierce the trauma of a patient confronted with machismo.
• Creation of Tunisia’s National Center of Cinema and Image.
• National Support Fund for Chadian Artists.

2012
• The 24th CFF Golden Tanit goes to The Pirogue by Senegalese Moussa Touré (87’) where emigrants try to cross the sea.

2013
• 23rd Fespaco; Theme: African cinema and public policies in Africa. Golden Stallion: Tey (Today) by Senegalese Alain Gomis (86’), where, without ever speaking, a man in transition to death reviews his life and questions his place in the world.
• Timbuktu (97’), in which Mauritanian Abderrahmane Sissako chooses derision to reveal the hypocrisy of the Jihadists, is the biggest success in French cinemas for a film directed by an African (1.7 million tickets sold).
• Ster-Kinekor builds the first Imax cinema on the continent in Durban (South Africa).

2015
• 24th Fespaco; End of the obligation to provide a 35mm copy for the competition. Theme: African Cinema: Production and Distribution in the Digital Age. Golden Stallion: FEVERS by Moroccan Hicham Ayouch (90’); in the Parisian, a tormented teenager goes to live with his father whom he doesn’t know.
• The CFF becomes annual and awards the Golden Tanit of its 26th edition to The Orchestra of the Blind of Moroccan Mohamed Mouftakir (110’), allegory of the political galaxy at the beginning of the reign of Hassan II.

2016
• The 27th CFF awards its Golden Tanit to a documentary: Zaineb Doesn’t Like Snow by Tunisian Kaoutther Ben Hania (94’), which follows a family moving to Canada over six years.
• The Bolloré group launches a program to build around fifty Canal Olympia, single-screen cinemas plus an open-air stage in French-speaking Africa.

2017
• 25th Fespaco, whose selection disappoints all professionals; Theme: Training and jobs in the film and audiovisual industry. 2nd Gold award for Senegalese Alain Gomis with Félicité (100’), in which a mother-courage escapes despair by accepting to be loved.
• The 28th CFF Golden Tanit goes to The Train of Salt and Sugar by Mozambican Licínio Azevedo (93’), where the wonderous is instilled in the middle of a civil war.

2018
• The 29th CFF Golden Tanit awarded to Fatwa by Tunisian Mahmoud Ben Mahmoud (102’), on the rise of the Salafists.

2019
• 26th Fespaco; fiftieth anniversary of the festival and improvement of the selection. Theme: Confronting our memory and forging the future of pan-African cinema in its identity, economy, and diversity. Golden Stallion: The Mercy of the Jungle by Rwandan Joël Karekezi (91’), where a young recruit and a sergeant have to face the jungle and rebel fighters.
• Creation of the Network of African Exhibitors and Distributors (REDA) which brings together 18 cinemas (Senegal, Mali, Ivory Coast, Niger, Burkina Faso, Chad) and intends to focus on African content.
• With its Grand Prix, the 72nd Cannes Film Festival awards for the first time a black woman director: Senegalese Mati Diop for Atlantis (104’), a fantasy film where the dead demand justice and women emancipate themselves.
• The 30th CFF Golden Tanit: Noura’s Dream by Tunisian Hinde Boujemaa (90’), in which a woman has to face her husband coming out of prison.
• Pathé Gaumont launches a multiplex construction program in French-speaking Africa: Tunis, Rabat, and Dakar, then the Ivory Coast.

2020
• Netflix broadcasts its first series entirely produced in Africa, Queen Sono, a South African spy series.
• The 31st CFF has no competition due to Covid-19 and focuses on heritage films and talks about the future of the festival.

2021
• Showmax shoots in Johannesburg in collaboration with CANAL+ the series Blood Psalms in Johannesburg in collaboration with CANAL+, presented as the “African Game of Thrones”, a bloody epic based on the pre-colonial mythology of South Africa.
• The leading film distributor and cinema exhibitor in Africa, Ster-Kinekor owns 55 locations and 424 screens; its competitor NU Metro 22 locations.
• Africa has 34 million pay-TV subscribers.
The UNESCO 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions provides Parties with rights to adopt policies and measures to ensure equal access to art including in digital form and access to the means of expression and dissemination for ensuring the free flow of ideas by word and image. It provides a legal weight to the concept of cultural goods and services as vectors of identity, values and meaning and thus must not be treated as mere commodities or consumer goods. Films are one of such "cultural goods" that carry significant "cultural values", witnessing historical moments, evoking deep emotion, challenging norms and prejudices and bringing people together. The film industry is one of the major cultural industries all around the world, including in Africa.

Creative talents are abundant in Africa, but do they have means to produce and disseminate their films? Do people in Africa have means to watch locally produced films along with films from other countries?

This UNESCO publication on the African film industry gives a snapshot of the tendencies of the Pan African film sector, challenges and opportunities for growth. As a tool for reflection and action, it is an open invitation to African policymakers and film practitioners to come together for further dialogue and for reinforced and concerted action in favour of the film sector. Taking one's place in the world of cinema requires collaboration and knowledge exchange, effective regulatory frameworks, structuring events, and most of all policies that recognise that culture binds a nation together and prepares it for dialogue with others.