RESEARCH FOR TANZANIA FILM POLICY
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On behalf of the Tanzania Film Federation
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List of Abbreviations

- BASATA NATIONAL ARTS COUNCIL
- BEST-AC BUSINESS ENTERPRISE SUPPORT TANZANIA
- BRELA BUSINESS REGULATION
- COSOTA COPYRIGHT SOCIETY OF TANZANIA
- COSOZA COPYRIGHT SOCIETY OF ZANZIBAR
- COSTECH SCIENCE & TECHNOLOGY COMMISSION
- FCB TANZANIA FILM CENSORSHIP BOARD
- NBC TANZANIA NATIONAL BUSINESS COUNCIL
- NDC NATIONAL DEVELOPMENT CORPORATION
- NPC NATIONAL PLANNING COMMISSION
- NEEC NATIONAL ECONOMIC EMPOWERMENT FUND
- TAIPA TANZANIA INDEPENDENT PRODUCERS ASSOCIATION
- TAFDA TANZANIA FILM DISTRIBUTORS ASSOCIATION
- Tafea TANZANIA FILM EDITORS ASSOCIATION
- Taff TANZANIA FILM FEDERATION
- Taloma TANZANIA LOCATION MANAGERS ASSOCIATION
- Tampta TANZANIA MOTION PICTURE TEACHERS’ ASSOCIATION
- Tasa TANZANIA SCRIPTWRITERS ASSOCIATION
- TBC TANZANIA BROADCASTING CORPORATION
- TCRA TANZANIA COMMUNICATIONS REGULATORY AUTHORITY
- TDFA TANZANIA FILM DIRECTORS ASSOCIATION
- TEA TANZANIA EDUCATION AUTHORITY
- TFDAA TANZANIA FILM & DRAMA ACTORS ASSOCIATION
- TfpA TANZANIA FILM PRODUCERS ASSOCIATION
- Tic TANZANIA INVESTMENT CENTRE
- Tra TANZANIA REVENUE AUTHORITY
- Tt TANTRADE
- Ttb TANZANIA TOURIST BOARD
- Ziff ZANZIBAR INTERNATIONAL FILM FESTIVAL
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1. INTRODUCTION

“Film industry” is an umbrella term that is used to describe a range of activities that drive and support the creation and distribution of entertainment media content - feature films, television programmes, advertising commercials, stills photography, corporate and business-to-business video and digital media production including computer games. Although the production, distribution and exhibition of films and videos is a private sector specialisation, the activity is nevertheless impacted by all parts of government operation – not only via cultural policy but education policy, technology, Intellectual Property, labour, the rights of Children, environmental management, water usage, immigration, direct foreign investment, tourism development, local and international trade, transport, Health and Safety and international promotion of the country’s image.

The Republic of Tanzania currently approaches the film sector from within a cultural policy framework. There is however, far less recognition of the potential of film as a significant and dynamic contributor to the nation’s economy. This research document therefore looks at the existing Tanzanian film industry both domestically and in its international context, and starts identifying the policy gaps that can be filled, to ensure that the film sector contributes to the Tanzanian economy, to Tanzanian culture and to the vision, goals and objectives of Vision 2025. The ultimate objective of this study is to provide clear and unequivocal inputs on a Tanzania Film Policy that would be adopted by the government in order to enable the film sector to achieve commercial outcomes in domestic and international markets.

Specifically, the project:

• Reviews a variety of policies, strategies, legislation and processes - national and international - that may impact on the formulation of a Tanzania Film policy. These documents offer guiding principles and legal frameworks.

• Collects views from key players on propositions related to establishment of efficient national policy and legislation system for the film industry in Tanzania;

• Prepares a Position Paper with appropriate guidelines in establishing Policy and legislation system for the film industry;
• Provides stakeholders and the government with best practices from other countries based on research and development of National policy and legislation system for the film industry.

The Methodology for the research draws on three primary principles - International Best Practice, African Experience, and Local Fit:

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<tr>
<th>PRINCIPLE</th>
<th>APPLICATION</th>
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<tr>
<td>International Best Practice</td>
<td>Supporting general objectives and structure. Informing analysis, and input into key outcomes. Knowledge-based inputs.</td>
<td>International Materials. Documentation from Film Commissions internationally. Existing relationships with leading film destinations and Film Commissioners. Professional experience with Film Commissions on four continents International role at Association of Film Commissioners International</td>
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<tr>
<td>Regional (African) Experience</td>
<td>Refinement of strategy; alignment with industry requirements and priorities. Making process relevant to stakeholders.</td>
<td>Professional experience of working with companies, services and governments across southern Africa. Knowledge of the entire regional market and its effect on the foreign market.</td>
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<tr>
<td>Local Fit</td>
<td>Adaptation of strategy to meet local requirements. Recommendations of appropriate structures</td>
<td>Literature review. Consultation with stakeholders incl. government departments, agencies, film industry, communities etc.</td>
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2. TANZANIA FILM INDUSTRY OVERVIEW

The Tanzanian film industry is sometimes referred to as Swahiliwood and more recently as Bongowood. The industry is comprised of the broadcasting, cinematic, theatrical and interactive industries and has been heavily
influenced by Indian and Nigerian cinema, and to a lesser extent, American films.

Absence of reliable figures and statistics make economic reporting on the industry difficult, but it has been reported that ten films a week are produced and approximately six of those released to the DVD/VCD markets each week. The industry is estimated to be capable of producing approximately 200 “real” films per year\(^1\). Production Budgets vary greatly with the average film produced for around TZS 10,000,000 (US$6,000). There is a small niche of films produced for significantly more (up to $250,000) but these are generally funded by international organizations for development or educational purposes. None of these films are likely to reach an audience at the limited number of cinemas halls/theatres in the country.

Currently film production budgets are financed entirely by private equity except in those rare cases where films are funded by International Development Partners (in which case they are not considered to be commercial pictures). Funding therefore often takes the form of the pre-sale of distribution rights (where the investor takes up the marketing of the film). Sponsorship and Product Placement do not exist in Tanzania as potential sources of finance as they do in many other film communities. There is a National Cultural Fund, which in principle provides limited support for film making, but in practice is a non-functioning method of finance.

Piracy of copyrighted material is an ongoing problem. As COSOTA restructures, it monitors usage in the public realm, when films are presented to a public audience. This means that the market in pirated films cannot be accurately tracked or measured. It is nevertheless assumed to represent a significant loss both to filmmakers and to the Revenue Authority annually. Efforts to tackle piracy have increased of late with a new joint initiative from COSOTA, BRELAC, the Film Censorship Board and Tanzania Revenue Authority, which will issue Tax Stamps for registered and legitimate dvds. The intention is that law enforcement would confiscate any dvds being sold in the marketplace that do not have the tax stamps.

In the absence of accurate statistics, there can be no estimate of the precise size, scope or value of the Tanzanian film industry. COSOTA estimates that

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\(^1\) Rob Aft, WIPO
the Copyright industries, of which film is an integral part, generated added value of between TZS 391.635 and TZS 680.990 billion to the economy in 2007-8. They also generated TZS 38.930 billion and TZS 83.686 billion as income to employees, or a proportion of 2.8% and 5.2% of the total national economic value. Tanzania’s Copyright industries made a contribution of 3.2% to GDP in 2009. In comparison to regional competitors, Kenya demonstrates about US$-45 million (industry estimates) added value in 2006, and in South Africa, City of Cape Town alone generated US$540 million in 2006 alone.

In spite of lack of clarity on the industry itself, the market for Tanzanian films is tangible. It includes not only the approximately 45 million Tanzanians inside the country but also another 85 million other Swahili speakers living in East Africa and outside the country, as well as the Swahili-speaking Diaspora, worldwide. This equates to a customer base of around 130 million people – which is 10 million more than the population of Nigeria. The potential of this market, if appropriately tapped by Tanzanian content producers, is - with no exaggeration - staggering. For example:

If just 2% of the regional Swahili speaking market were to buy just one Tanzanian film a year at TZS 2500 a dvd, value added to the economy would be TZS 6.5 billion – with labour and small businesses all along the value chain contributing to the tax base of the country.

If just ten Tanzanian producers each produced six films a year, and each of those films reached just one hundred thousand Swahili speakers in the region at a cost of TZS5000 a dvd, then the income before expenses and tax would still be TZS 30 billion.

Tanzania’s economy is growing – as much as 7-8% per year by some estimates – and the country is politically stable. The median age of the population is around 18 years, and literacy is estimated to be between around 73%\(^2\). With improvements both in economic status and education, it is expected that Tanzanian youth would increasingly seek to consume audio-visual content in general and Tanzanian / Swahili-language content in particular.

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There are few opportunities to study film in Tanzania, either in the form of short courses, or in more in-depth professional studies. In spite of an approved curriculum, there has been very little uptake of Film as a course at schools – only Darajani Primary School is currently offering the subject. The University of Dar Es Salaam department of Theatre and Fine Arts offers courses at a higher level, and is investigating options for short courses. However, it is fair to say that the current training options do not serve to significantly up-skill industry members (aspiring or active) and the quality of production outputs therefore remains low.

One unique factor of the Tanzanian environment is the presence of a single vertically integrated business. Steps Entertainment is a true Media Conglomerate in that it owns large chunks of the value chain, with its own production, distribution and exhibition arms, including online, on dvd and broadcast. It is thus able to effectively dominate the local industry, both influencing the amounts paid for copyright and distribution, as well as the amount paid for dvds in the open market.

A summary of the challenges facing the Tanzania Film Industry therefore includes:

- Lack of understanding of Film as a Business both by government and the community.
- Lack of a Tanzania Film Policy in Tanzania to guide and enable sector development from an economic perspective.
- Lack of an Institutional / Organizational framework with which to manage Film Sector growth.
- Lack of a National Strategic Action Plan to support the Film Industry in Tanzania
- Lack of adequate film education and skills training opportunities at all levels of experience.
- Lack of viable “value chain” in Tanzania – from ideas to producers to distributors, from pre-production to production to post-production
- Lack of a formalized administrative framework to manage all aspects of film production; from the script to the producer, to the director, to the cast, the production houses, and distributors.
- Lack of specialization in the film industry
- Trust issues between stakeholders.
3. THE GLOBAL FILM INDUSTRY

The film industry has become a massive economic force worldwide, worth US$1.6 trillion, and it is estimated to grow at a compound annual growth rate of 5.6% over the next five years, generating revenues of US$2.2 trillion by 2017. Developing a business environment that is conducive to “film industry” activity has proved desirable to many governments because of the economic, social and cultural benefits arising from the sector. These benefits include job creation, the stimulation of local small businesses, direct foreign investment and tourism promotion. Other benefits include:

- Improved private sector investment in non-traditional economic sectors;
- Increased attraction of entrepreneurs into the marketplace to provide services to the sector;
- Improved public finance, through increased cash inflow / tax revenues
- Improved positioning of the country in relation to competitors
- Improved business environment created that attracts other investors
- Stronger institutions required to facilitate productions and manage the growth
- Strong connection to the regions due to highly mobile productions using all parts of the country.
- Potential to women’s, poverty-related beneficiaries.
- Opportunity to plug into Knowledge and Information Economy
- The correlation between Media Literacy and Citizenship.
- Youth development focus.

3.i THE ECONOMIC ARGUMENT

3.i.i Value Chain
One of the major reasons why the film sector is so valuable to governments is the length of its value chain. This starts with the original idea or concept for a film, moves through its development, production and post-production, is then distributed to various different platforms of exhibition, where it is consumed by an audience.
The film industry Value Chain is generally laid out as follows:

**CONCEPT AND FINANCING**

Refers to the inception phase of a production. This starts right at the beginning of the process and includes the conceptualisation of a film, and the creation of a script. It also includes film financing and sales and distribution planning.

**PRE-PRODUCTION, PRODUCTION AND POST PRODUCTION**

These activities can generally be described as the activities required to produce one negative print of a movie. It begins once the budget has been sourced; the physical elements required to shoot the film are then assembled. This includes finding locations, planning and scheduling shoot days, employing cast and crew etc. Production is the act of filming, where the disparate parts (crew, equipment, talent etc) are brought together. Post-production refers to the editing process where the production is edited, and special effects and sound are added. The final product is a two-part entity: the “negative” or reel of the completed film, and the Chain-of-Title copyright documentation that proves ownership of various elements of the creative process.

The other side of the value chain is determined by what happens to that one “negative” once it is completed, namely MONETISATION.

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* Citation needed
DISTRIBUTION
Refers to the activities around buying and selling the print of the film. The distributor is a legal entity, a person or a corporation, that has been granted the right to generate revenue from the copyright of the film. They will generate revenue by releasing the film to the public or licensing the rights to sub-Distributors (eg tv stations) who will release to the public in their defined territory, language and medium.

PLATFORMS / EXHIBITION
Refers to how the Film is packaged into various channels or streams of distribution (eg. Cinema, Television, Pay-per-View, DVD sales.) Exhibitors earn their revenue by screening or releasing the film to a specific public (defined by their “license” to use the copyright)

CONSUMPTION
Refers to the manner and level with which audiences / consumers take up the product via its various channels.

3.i.ii Disintegrated Production
Perhaps more important that the length of the value chain is the fact that, in more developed markets, the entire value chain is “vertically disintegrated” – which means that different businesses are involved in providing specialised and dedicated services to each stage of the production.

For example, most filmmakers do not own the methods of production – the cameras and lenses, lighting equipment, sound recording equipment, construction and painting skills, the wardrobe and other elements required to construct a film – but would hire the products and services from suppliers in the local marketplace. Further, the producers of films have not typically distributed their films themselves, nor have they played a role in determining in which platforms the film will appear. There is also relatively little direct contact between the film producer and the audience. These scenarios are changing due to the rapid rise of digital technology, but the principle of vertical disintegration is still largely unchanged, and film production remains capable of impacting on small suppliers across the entire value chain.
See Annexure A for a list of businesses involved in the disintegrated Film Industry value chain.

3.ii  CULTURAL & SOCIAL BENEFITS
Beyond the economic benefits, the Film Industry offers significant social and cultural benefits. Film is not only a valuable tool for the interpretation of culture, it is an cultural activity in its own right, with its own narrative and language which is worthy of study, scrutiny, and reflection. Film therefore offers citizens the opportunity of crafting, shaping and communicating their own images, effectively demystifying cultural and ethnic differences, and promoting integration and unity of people. The film industry therefore can play a primary role in building a national identity, and is vital for democracy, nation building and citizenship.

However, the cultural benefits become even more important given the global shift from traditional industrial- and agricultural-based economies to a knowledge- and information- based economy. In this environment, “Media literacy” – access to film and media content, the comprehension and understanding of how film and media works, the ability to interpret media messages, and the ability to create media oneself using communication and production skills - has an outsized role to play. Citizens who are media literate will be better able to make informed choices with regard to the audiovisual content market. They will be better informed about what they want to see and better able to evaluate the implications of their choices. They will also be better able to protect themselves and their loved ones from harmful, offensive or undesired content and they will be more demanding of the kinds of content that reflect their own cultures and traditions.

According to Aviva Silver, Head of “MEDIA Programme and Media Literacy” Unit at the European Commission, Media literacy is an extremely important factor for “active citizenship” in today’s information society, “a real key prerequisite just as literacy was at the beginning of the twentieth century. It is a fundamental skill not only for the young generation but also for adults (elderly people, parents, teachers and media professionals).”
4. INTERNATIONAL CONTEXT

Around the world, the production of film and television programmes exhibits a number of typical drivers that influence the success or otherwise of the industry. These include:

4.i Globalisation
Today’s “Film Industry” is a truly globalized business, with countries all over the world making and distributing films. Major film production studios – whether for features, television or advertising - reflect global ownership, and even Productions themselves are internationally co-owned and co-financed, most notably in the form of co-productions and financial incentives. Filming itself is also often cross-border, with productions frequently filming in multiple international locations to take advantage of authentic locations and competitive costs.

Additionally, because product innovation in the film industry is undertaken in temporary projects, the production process relies upon intricate and informal social relations of people who know each other through previous projects, and who often re-use previously built trust for future collaborations. With a greater number of film productions operating globally, and with higher mobility of talent between countries and film clusters, such social relations now also increasingly span the planet.

4.ii Knowledge Economy
As mentioned above, there is a global shift from traditional industrial- and agricultural-based economies to a knowledge- and information-based economy. The Knowledge Economy is changing the nature not only of economic activity, but also our understanding of it. Unlike physical goods, for instance information is not destroyed in consumption but rather can be enjoyed again and again. This requires new ground rules: for example, traditional “products” decline in value the more they are used, whereas the value of an idea increases to the degree that it can be shared with and used by others. Up front development costs may be very high, but the reproduction transmission costs are low.

4.iii Funding
Film production is an expensive art form, and funding of all kinds, and throughout the film industry value chain from content creation, through production and post-production and to sales and distribution, is the lifeblood of local production. Access to funds is therefore a major driver of the film industry, and the support and buy-in of the banking and insurance sectors is valuable, as is access to regional funds (eg. Ford Foundation) that may not currently be fully exploited by Tanzania. International partnerships in the form of Co-Production Agreements also contribute to the availability of funding. An additional funding-related issue is the producer’s ability to “bridge” cash-flow during the long pre-production process when no revenues are being generated.

4.iv  Production Efficiency
Film Producers are, in effect, Systems Coordinators who are required to nurture and exploit vertical linkages between firms at different levels of the value chain (i.e. the availability of a range of specialised crew and service providers) as well as horizontal linkages between firms at the same level in the value chain (i.e. increase bargaining power with suppliers, or to facilitate the creation of industry standards.) Elements that disrupt the efficiency of production – from faulty or low quality equipment, poor crew skills / lack of training or unclear government processes – all impact on efficiency and therefore profitability.

4.v  Chain of Title
The Chain of Title spells out the various rights that are owned in relation to the film – the script, the music, the performances of the music, any additional creative inputs. – and it clearly stipulates the conditions under which the filmmaker is legally permitted to exploit those rights for gain. Without a Chain of Title, a film cannot be sold, and international distributors and platforms will not consider a local film for international distribution. Of course, Chain of Title is only as strong as the will and capacity to enforce it.

4.vi  Competition
The amount of content produced for cinema, TV and other exhibition channels increases annually and locally-made content is forced to compete against an ever increasing multitude of competitive products in order to be profitable. The competition for audience is further influenced as follows

4.vi.i  Audience - Consumer Preference
The success of an industry is determined by the demand preferences of its audiences – in other words, what the community / citizenry wants to watch. Is there a vibrant demand for local films? Do people want to see their own cultures on film? Audience Development activities are frequently applied to try to influence consumer preference for local films.

4.vi.ii Audience - Demand Uncertainty
Although Consumer Preference may seek out local films, consumer tastes for film content are actually unpredictable. The driver of Demand Uncertainty – which talks to the various competing demands placed on audiences for their spending money, and the resulting instability of their purchasing decisions - means that not all local films will find an audience.

4.vi.iii Audience - Market Size
A further driver therefore is for films to also have a relatively large market size – sufficient numbers of fee-paying “audiences” in the form of cinema-goers, DVD and download renters and purchaser, tv licensees etc. Since the cost of developing and producing films is high, films need to make a lot of money in order to cover costs before it can even begin to generate a profit for the filmmaker.

4.vi.iv Audience – The “Tyranny of Location”
Customer Preference is also reflected in the platforms through which audiences chose to consume products. An element affecting these choices is what has been described as the “tyranny of location.” This relates to the impact on the fulfilment of customer demand that arises from the inability of physical locations – such as cinemas and dvd stores for example – to distribute content to customers beyond their limited physical catchment area or vicinity.

4.vii Content Quotas
Audience demand is frequently influenced by Local Content Regulations that can be a significant and important driver of local production activity. Enforceable laws imposed on broadcasters to screen a certain percentage of local content, or spend a certain percentage of revenues on local filmmaking, can artificially increase market size.
4. viii Film Friendliness
"Institutional thickness" is a term that expresses the overlapping frameworks of support, such as local and regional authorities, innovation and business support agencies, funding and financing agencies, educational institutions and skills. "Institutional thickness" is the key driver that establishes a "film friendly" environment that eliminates the risks and manages the costs of production.

4. ix Economies of Scale
The production of films and TV programmes is characterized by high fixed costs and economies of scale. For example, costs of creating the first “negative” of a film are high, but the subsequent expense associated with duplication and distribution of that finished product will be relatively low – in the case of electronic / digital distribution, zero. However scale also works against film sector development, because the cost of the production bears little reflection on the cost of the final product, and audiences are accustomed to pay the same admission price for a TZS5 million production as they are for a $US150 million blockbuster.

4.x Export Markets
There is the growing opportunity to export films beyond their country of origin. However consumer tastes in diverse global export markets are even more unpredictable than home markets. For exported content into global markets, there is a scenario that’s known as the “liability of foreignness” – literally the cultural, linguistic, stylistic differences that are frequently hard to overcome. For instance, the Chinese blockbuster “Lost in Thailand” made $200 million at the Chinese box office, but only $68,000 on release in the USA. The American film industry spends a massive amount on marketing in order to ensure that Hollywood films are not limited by their foreignness. The most successful films are able to overcome this liability, or to better exploit markets closer to home.

However, mass markets are not the only outcome of globalization. There is equally a demonstration of the potential of film producers to now reach quite specific, niche audiences in several different countries simultaneously.

4.xi Additional Channels of Distribution
The advent of additional exhibition channels for films product (TV, home video, and now the Internet) and other sources of revenue (merchandizing,
royalties from film-related copyrights used in other media, such as music, games, and publishing), means that companies able to integrate these new exhibition channels and media in effect become multi-media corporations. The distribution of films digitally also alleviates and overcomes challenges with the “tyranny of location.”

4.xii  Social Media
Social Media is a driver of increasing importance to the film and television industry, influencing not just on the way we choose the films to watch, but on how we watch them, and even on how those films and tv shows are getting made. A 2013 survey conducted by The Hollywood Reporter noted a remarkable 72% of social media users write online comments about films they see – many of them multi-tasking while they are actually watching - and as many as half of American 18- to 24-year-olds claim that using social networking sites while watching movies actually adds to their experience of cinema-going. Social media allows filmmakers to connect directly with their audience.

5. FOREIGN FILMS ON LOCATION

As well as creating an environment for local filmmakers, opportunities exist to attract international filmmakers to use a country as a filming location. Some 350 governments (national, regional, city) in over forty countries now have dedicated agencies to promote and develop this business.

5.i  Production on Location
As mentioned above, today’s “Film Industry” is a truly globalized business, with countries all over the world making and distributing films. As a result of this globalised business model, many major and minor studios and independent filmmakers will travel to international destinations to make their productions. They do this for a number reasons including:

• The specific Physical Location is given in the script.
• The physical location that can play “stand-in” for a location in the script.
• A physical location that can contribute to the overall “look and feel” of the film and the plot. (This is often a visual shorthand for “exotic”)

![Image 1](http://example.com/image1.png)

![Image 2](http://example.com/image2.png)
• A physical location that can attract a specific target audience.

Every international production that can be persuaded to film on location in a particular destination means a high profile, low-impact injection of foreign currency that can create jobs, stimulate small business activity and expose the country’s brand and positive images to a wider global market.

The largest inbound productions provide freelance work for more than 1500 people with jobs created for camera operators, sound and lighting technicians, caterers, plumbers, carpenters, animal trainers, truck drivers, make-up artists, graphic artists, photographers, set designers, painters and actors. Production budgets are further spent in the wider community on a range of products from hardware to props, plants to steel, paint to timber, draperies to carpets, furniture to portable dressing rooms to generators. A thriving film industry therefore draws on the resources of and helps to build the whole economy.

5.ii Key Drivers of Production on Location

Drivers of the International Production-on-Location are as follows:

• Cost; bottom-line financial feasibility of a location trumps virtually all other issues.
• Cost-effectiveness is subject to a variety of issues including exchange fluctuations, travel distances, and availability of local hire of skilled cast/crew/equipment/services.
• Cost considerations are also influenced by the availability of Financial Incentives.
• The ease of working in that location is extremely important. This is influenced by support from all levels of Government, for instance the availability of competitive incentives, clear permit approval processes, location access, visa processes etc.
• The availability of authentic locations. The flexibility of a location so that it might “stand in” for somewhere else is a valuable commodity. Studios and other production-ready spaces are also useful
• A vibrant and effective tourism infrastructure of good hotels, restaurants and other leisure activities to ensure that time spent away from home is pleasurable.
• Post Production services – and the bandwidth with which to disseminate information and images rapidly and inexpensively.
• Decisions are further influenced by a variety of unpredictable dynamics, such as seasonal weather, star / director personal preference, or storyline.

To influence production decisions, many countries offer Film Incentives; the governments of Australia, Austria, Belgium, Bulgaria, Brazil, Canada, the Cayman Islands, Colombia, Croatia, Fiji, France, Germany, Hungary, Iceland, Ireland, Isle of Man, Italy, Luxembourg, Malta, Malaysia, Mexico, New Zealand, Serbia, South Africa, South Korea, Spain, United Arab Emirates (Abu Dhabi) and the United Kingdom all use film incentives to attract production, as well as governments at province, state and city level within many of these countries.

5.iii Major Production Centres
Thirteen countries in 2011 had Entertainment and Media spending above $25 billion, led by the United States at $464 billion, followed by Japan, China, Germany, and the United Kingdom. Brazil overtook South Korea in 2011 and during the next five years will pass Canada and Italy to become the seventh largest market.

Other key production centres include Bollywood (India) and Nollywood (Nigeria). Bollywood produces 1000 films every year (double Hollywood’s output). 14 million Indians go to the movies on a daily basis. Bollywood employs 6 million people, grosses around US$10 billion per annum, and sells 3.1 billion cinema tickets each year (The U.S. sells about 2.9 billion cinema tickets per annum.)

Nollywood (Nigeria) produces between 2000-3000 films every year (triple Hollywood’s output). Fifty new titles are delivered to Nigerian shops and market stalls every week, where an average film sells 50,000 copies at $2 per copy. Nollywood’s gross is about US$200 to 300 million a year and the industry employs 1 million people (NFCVB).

5.iv Economic Impacts
International productions signify an injection of foreign currency, into the skills and services available within a community. Production budgets are

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spent on a range of products and services – not just from specialist film industry suppliers, but from businesses in the broader community.

There are no reports on the spend of foreign productions in Tanzania, but the untapped economic potential of an enabled sector can be highlighted by comparing with some of the results elsewhere on the continent. Economic Impact Assessments conducted in South Africa by the Commercial Producers Association of South Africa and the South African Association of Stills Producers give interesting insight into the factor costs of the different genres of production. Reports conducted during different periods by the various provincial film commissions and offices give further clarity on the way that foreign film production contributes to economic growth.

The budget breakdown of the various genres of production as they relate to South African spend is as follows:

**TELEVISION COMMERCIALS**

<table>
<thead>
<tr>
<th>Line Item</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crew (Labour 1)</td>
<td>26.45</td>
</tr>
<tr>
<td>Equipment</td>
<td>15.68</td>
</tr>
<tr>
<td>Art Department</td>
<td>12.48</td>
</tr>
<tr>
<td>Post</td>
<td>11.03</td>
</tr>
<tr>
<td>Locations</td>
<td>7.67</td>
</tr>
<tr>
<td>Talent (Labour 2)</td>
<td>6.11</td>
</tr>
<tr>
<td>Vehicle Hire</td>
<td>5.7</td>
</tr>
<tr>
<td>Stock</td>
<td>5.67</td>
</tr>
<tr>
<td>Catering</td>
<td>4.53</td>
</tr>
<tr>
<td>Set Construction</td>
<td>2.42</td>
</tr>
</tbody>
</table>

For TV Commercials, the average turnover generated per commercial is **R1,451,823.46** (TZS 234,772,466.42) which is accrued over an average number of shoot days per commercial of 2.20 days. The unweighted average daily budget per commercial is therefore **R 660,760.28** (TZS 106,857,645.31). The unweighted average cost for a shoot day based on reported cost of sales items, across all types of commercials produced, is **R 505,979.52**. (TZS 81,844,470.98) Total reported South African commercial expenditure during 2011/12 was **R 1,023,535,537.14** – that’s **TZS 165,566,532,326.98** just for the production of 30 second TV commercials for the international and local markets.
For all types of commercial the biggest expense is Crew (Labour) Remuneration. Equipment Hire, Set and Art, and Talent Fees are also significant expenditure line items. Post production expenditure is a significant factor cost for local commercials (international commercials typically return home to finalise post production.)

STILLS PRODUCTION

<table>
<thead>
<tr>
<th>Line Item</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Talent</td>
<td>40.45</td>
</tr>
<tr>
<td>Crew</td>
<td>19.42</td>
</tr>
<tr>
<td>Equipment</td>
<td>16.18</td>
</tr>
<tr>
<td>Art Department</td>
<td>6.47</td>
</tr>
<tr>
<td>Locations</td>
<td>4.85</td>
</tr>
<tr>
<td>Catering</td>
<td>4.85</td>
</tr>
<tr>
<td>Vehicle Hire</td>
<td>4.85</td>
</tr>
<tr>
<td>Set Construction</td>
<td>1.62</td>
</tr>
</tbody>
</table>

Stills Productions are international photographic shoots for that result in photographs used in billboards, product packaging, fashion magazines, etc. The largest impacts of a Stills Production are Talent, Crew and Equipment. These three items amount to 87.4% of the average Stills production budget. The average Stills budget is **R347,000** (TZS 56,126,620) for an average 8 days of production.

For Long Form production, the Commercial Producers Association Long Form report can be used to determine the starting point for the cost of the average long form production. An average cost of a long form production in South Africa was calculated at **R37.2 million**. (TZS 6,017,385,223) This figure is itself is given as a weighted average of big budget studio productions – usually with budgets in excess of R50 million – and smaller independent productions with an average budget of R14.9 million.

FEATURE FILMS

<table>
<thead>
<tr>
<th>Line Item</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crew</td>
<td>38.07</td>
</tr>
<tr>
<td>Equipment</td>
<td>12.90</td>
</tr>
</tbody>
</table>
The three largest areas of impact for feature films are crew, equipment, set construction and vehicle hire. The five biggest line items on a feature film budget amount to 72.81% of the total production budget.

The South African National Film and Video Foundation, the statutory body established by the government to oversee the development of the film sector commissioned Deloitte to research and determine the economic benefits and the value chain profile of the South African Film Industry (“SAFI”). Key findings from this research show that in 2012 the SAFI:

- Contributed R3.5 billion (TZS 566 billion) to South Africa’s GDP (both direct and indirect spend);
- Created over 25 175 Full-Time Equivalent jobs;
- Earned over R670 million (TZS 108,354 million) towards the South African GDP;
- Encompassed over 2 500 direct service provider companies; and
- Delivered an economic multiplier of 2.89, i.e. for every R1 spent in the industry, another R1.89 was generated within the South African economy.

Although the SAFI is not the biggest GDP contributor or job creator when compared to some of the other South African industries, e.g. manufacturing or retail, its multiplier of 2.89 puts it at mid-range when compared to 99 other industries. Also, it more than pays for itself with a delivery back to SARS of more than R670 million (R420 million more than the estimated Film Incentive of R250 million paid out in 2012).

Comparatively in the region, in the 1970s and early 1980s, Kenya was producing and hosting as many international film crews as South Africa, according to the Kenya Film Policy. In 2006 film production in Kenya
generated about US$0.45 million (industry estimates). Kenya today should conservatively have had an industry that is at least five times its current size if the growth curve had been maintained since the 1970's.

5.5. National Branding and Film Tourism Linkages
International production on location also has the potential to significantly contribute to a country’s international position, especially with regards to tourism. The power of film in portraying a positive destination image to induce tourism visits to a place has been clearly shown in various research (e.g. Tooke & Baker 1996; Iwashita 2006; Kim et al., 2008). As long ago as 1998, The Annals of Tourism Research noted that locations where a successful film had been shot demonstrated a 54% increase in tourism visits over the following four years.

Film London, the UK capital’s screen agency, reported that films and television programmes depicting the UK are responsible for attracting about 1 in 10 overseas tourists, who spend around £1.8 billion a year - and they estimate that approximately 28 million visitors visit Britain each year after viewing the country on the screen. Visit Britain even suggests that films could be influencing the expectations of up to 40% of the international visitors coming to the UK, and Film production is therefore recognized generally as a major contributor to the UK brand (Roesch 2009, 222).

Internationally, these kinds of figures are noted again and again, translating to huge numbers of travellers. 2012’s global benchmarking survey TRAVELSAT© Competitive Index noted that around 40 million international tourists chose their destination mostly because they saw a film shot in the country. On average - and depending on the destination and market – the report suggests that up to 10 visitors in every 100 would choose a destination mostly thanks to movies.
6. KEY STAKEHOLDERS

Within government, the Film Sector has a number of stakeholders from both the Economic and Cultural sectors. While listed in no particular ranking or order of importance, the Economic agencies are grouped first, followed by the Arts agencies.

6.i NATIONAL PLANNING COMMISSION
The Planning Commission falls under the President’s Office. It is a Think Tank responsible for monitoring; analysing and providing advice on big picture and long term sectoral policies and socio-economic developmental issues. It also focuses on the needs of policy makers on current policy issues. The Planning Commission conducts policy analyses on problems of great public importance to provide solutions to be implemented by the Government.

6.ii TANTRADE
The Tanzania Trade Development Authority (TanTrade) was established by the Tanzania Trade Development Authority Act No. 4 of 2009. TanTrade is mandated among other things is to implement the National Trade Policy, the National Export Development Strategy, the Trade Integration Strategy and other sector policies all which aim at developing and promoting Tanzania’s internal and external trade. The goal is to enhance Tanzania’s economic performance through development and promotion of goods and services for both local and foreign markets.

6.iii TANZANIA TOURIST BOARD
Tanzania Tourist Board is a government organization that was legally established under Tanzania Tourist Board act, CAP 364 of 1962 and amended by act No. 18 of 1992. The Board is mandated with promotion and development of all the aspects of tourism industry in Tanzania. Its vision is that Tourism becomes the number one contributing sector to the GDP by the year 2025, and its mission is to promote sustainable tourism both domestically and internationally through innovative and dynamic awareness creation.

6.iv TANZANIA NATIONAL BUSINESS COUNCIL
TNBC provides a forum for public/private sector dialogue with a view to reaching consensus and/mutual understanding on strategic issues related to
the efficient management of development resources. For SME entrepreneurs the TNBC offers broad information on the creation of a conducive environment for a private sector led economic growth in terms of wealth and employment creation and revenue generation in the poverty alleviation process.

6.v  TANZANIA INVESTMENT CENTRE
Tanzania Investment Centre (TIC) is the primary agency of Government to coordinate, encourage, promote and facilitate investment in Tanzania and to advise the Government on investment related matters. TIC is the focal point and first point of call for potential investors offering a “one stop facilitative centre for all investors”. Its mission is to Promote and Facilitate Investment for national economic growth by enhancing an environment conducive for business and entrepreneurship growth.

6.vi  TANZANIA COMMUNICATIONS REGULATORY AUTHORITY
The Tanzania Communications Regulatory Authority (TCRA) is a statutory regulatory body responsible for regulating the communications and broadcasting sectors in Tanzania. It was established under the TCRA Act no. 12 of 2003 that merged the Tanzania Communications Commission (TCC) and the Tanzania Broadcasting Commission (TBC). The functions of TCRA according to its establishing Act No. 12 of 2003 include among others, to issue, renew and cancel broadcast licences in Tanzania and to establish standards for regulated goods and regulated services.

6.vii  NATIONAL ECONOMIC EMPOWERMENT FUND
The National Economic Empowerment Fund was established as a result of the National Economic Empowerment Policy that showed that availability of investment capital is a major constraint to economic participation of many Tanzanians. The main objects of the Fund are as follows:-

• Promoting universal understanding of equity ownership of property among Tanzanians;
• Contributing to creation of employment opportunities;
• Providing a link between institutions and organizations that are registered under the Act and to monitor economic activities undertaken by such institutions and organizations, and where necessary to provide technical and, or facilities that may be necessary for the purpose of advancement and furtherance of their economic activities; and
• Employing such schemes of businesses and enterprises as may be necessary to achieve the objectives of the Act.

The National Empowerment Fund (also known as Mwananchi Empowerment Fund) became operational in January 2008 with a seed capital of TSh 400 million. The seed capital was deposited at CRDB Bank PLC as guarantee to credit offered by CRDB to Tanzanians in five regions. The agreement reached between CRDB and the National Economic Empowerment Council is that the Bank will issue loans three times the amount deposited i.e. TSh 1.2 billion. The coverage area and value of loans will increase depending on the increase in amount of seed capital deposited with CRDB.

6.viii NATIONAL DEVELOPMENT CORPORATION
The National Development Corporation (NDC) was established by the government to catalyze economic development in all sectors of the economy. The NDC was given a broad mandate as a development and promotion institution to stimulate industrialization in partnership with private sector under the cabinet memorandum No. 6/1996 of 1996.

6.ix TANZANIA BROADCASTING CORPORATION
TBC strives to be a truly Public Broadcaster that is accountable to the public through its programmes that are characterised as follows:
• Broadcast throughout the Nation
• Broadcasting quality programmes with universal appeal,
• Broadcast impartial programmes.
• Accessible to all citizens regardless of their ideology, religion, class or physical disability

TBC has local content obligations of 75% of local programming but it has challenges finding sufficient content of appropriate quality. The broadcaster has to find around 75% of its operating income from commercial sources.

6.x COSTECH
COSTECH is the principal advisory organ of the Government on all matters relating to scientific research and technology development in the country. The roles of the Commission are as summarized below:
• To advice the Government on all matters relating to Science & Technology including but not limited to the formulation of Science & Technology policy, priority setting for Research & Development, allocation and utilization of resources.
• To promote, coordinate, monitor and evaluate scientific research and technology development and technology transfer activities in the country.
• To facilitate national, regional and international cooperation in scientific research and technology development and transfer.
• To acquire, store, and disseminate scientific and technological information and popularize Science & Technology.

The composition of the Commission has members representing all sectors of the economy, Deans/Directors of faculties and institutes that deal with R&D activities and representatives from Ministries of both the Union Government and Government of Zanzibar that directly affect R&D activities in the country. All key national economic sectors, including agriculture and livestock, public health, forestry, fisheries, marine sciences, minerals, industry and energy and wildlife are represented.

6.xi TANZANIA REVENUE AUTHORITY
The Tanzania Revenue Authority (TRA) was established by Act of Parliament Not. 11 of 1995, and started its operations on 1st July 1996. In carrying out its statutory functions, TRA is regulated by law, and is responsible for administering impartially various taxes of the Central Government. A main goal of TRA is to increase revenue to GDP to 19.9% by 2018

6.xii BASATA
Baraza la Sanaa la Taifa – is the National Arts Council. It is an official parastatal organization established under the National Arts Council Act No. 23 of 1984 and is the official government agency for the revival, promotion and development of the arts in Tanzania. It’s role is to streamline the government’s liability, promote and develop the arts in Tanzania and facilitate the production and use of art, encourage and promote a culture of Tanzanian art and promote creativity and innovation in the arts.

6.xiii COSOTA
The Copyright Society of Tanzania (COSOTA) is a statutory body set up by the government of Tanzania under the Ministry of Industry and Trade. Established under S.46 of the Copyright and Neighboring Rights Act, No. 7 of 1999, the Copyright Society of Tanzania is vested with power to administer the Copyright Act. COSOTA’s functions are:
• To promote and protect the interests of authors, performers, translators, producers of sound recordings, broadcasters, publishers, and, in particular, to collect and distribute any royalties or other remuneration accorded to them in respect of their rights provided for in this Act.

• To maintain registers of works, productions and associations of authors, performers, translators, producers of sound recordings, broadcasters and publishers.

• To search for, identify and publicize the rights of owners and give evidence of the ownership of these where there is a dispute or an infringement.

• To print, publish, issue or circulate any information, report, periodical, books, pamphlet, leaflet or any other material relating to copyright and rights of performers, producers of recordings and broadcasters.

• To advise the Minister on all matters under this Act.

6.xiv TANZANIA EDUCATION AUTHORITY
TEA is a corporate body established under section 5(1) of the Education Fund Act No. 8 of 2001 to manage the Education Fund. TEA’s role is to work together with the Government, Public and other partners to solicit resources for Education Fund and effectively deploy the resources to facilitate Education Projects through providing loans and or grants to schools, colleges and universities. The Fund was established in 2001 by the Education Fund Act No. 8 of 2001 and is the repository of resources collected from Government allocation, voluntary contributions, and grants loans and from “Other Sources”. The monies collected are used to facilitate improvement of quality in education provision, increasing of quality in education provision, increasing access and promoting equity in education provision all levels.

6.xv BRELA
The Business Registration and Licensing Agency is charged with the registration and licensing of businesses including film production and distribution entities. Brela’s position is that a market economy is a catalyst to sustainable economic development, because it breeds and nurtures competition in the markets for both goods and services. Competition in turn leads to product and systems innovations for better quality products and services in the market and also value for money, all for the benefit of consumers.
6.xvi  TANZANIA FILM CENSORSHIP BOARD
Under the Ministry of Information, Youth, Culture and Sports, the Board is responsible for registering screenplays and censoring final version of the film. Sources suggest that they censor approximately 200 films per year. The Film Censorship Board has made several internal attempts to draft a Film Policy (2004, 2006, 2009) but these have not been shared with the industry.

6.xvii  OTHER DEPARTMENTS
Due to the broad range of impacts of film production there are a whole range of further government departments whose roles intersect with the film industry.

<table>
<thead>
<tr>
<th>Department</th>
<th>Example of involvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communications</td>
<td>Technology, Digital Production, State bulletins</td>
</tr>
<tr>
<td>Traditional Affairs</td>
<td>Protocol, Land Use,</td>
</tr>
<tr>
<td>Correctional Services</td>
<td>Locations, Access</td>
</tr>
<tr>
<td>Customs &amp; Immigration</td>
<td>Carnets, Equipment Import, Visas, Border Entry Processes</td>
</tr>
<tr>
<td>Defence</td>
<td>Locations, Access, Hardware, Personnel</td>
</tr>
<tr>
<td>Energy</td>
<td>Locations, Access</td>
</tr>
<tr>
<td>Environmental Affairs</td>
<td>Locations, Access, Protocols, Protection</td>
</tr>
<tr>
<td>Health</td>
<td>Production Health &amp; Safety Protocols</td>
</tr>
<tr>
<td>Home Affairs</td>
<td>Permissions for Foreign Crew to enter,</td>
</tr>
<tr>
<td>Foreign Affairs</td>
<td>Embassies &amp; Consulates info points</td>
</tr>
<tr>
<td>Justice</td>
<td>Locations Access (eg Courts)</td>
</tr>
<tr>
<td>Labour</td>
<td>Working Conditions,</td>
</tr>
<tr>
<td>Mining</td>
<td>Locations Access</td>
</tr>
<tr>
<td>Parks &amp; Wildlife</td>
<td>Locations Access, Environment</td>
</tr>
<tr>
<td>Public Works</td>
<td>Land Use, Equipment, Signage, Cleansing</td>
</tr>
<tr>
<td>Rural Development</td>
<td>Production access in rural areas.</td>
</tr>
<tr>
<td>Roads &amp; Transport</td>
<td>Locations, Access, Road Closures, Haulage</td>
</tr>
<tr>
<td>Safety &amp; Security</td>
<td>Locations, Access, Road Use, Protocols</td>
</tr>
<tr>
<td>Police Service</td>
<td>Locations, Protocols, Safety &amp; Disaster Management</td>
</tr>
<tr>
<td>Social Development</td>
<td>Community involvement</td>
</tr>
<tr>
<td>Water</td>
<td>Use, Locations Access, Environment</td>
</tr>
</tbody>
</table>

6.xviii  TANZANIA FILM FEDERATION
A non-governmental umbrella group formed by nine film industry association stakeholders to promote issues important to their respective memberships and to the film industry in general. Members are:

- Tanzania Drama And Film Actors Association (TFDAA)
• Tanzania Film Directors Association (TFDA)
• Tanzania Film Editors Association (TEFA)
• Tanzania Scriptwriters Association (TSA)
• Tanzania Film Distributors Association (TFDA)
• Tanzania Film Producers Association (TFPA)
• Tanzania Location Managers Association (TALOMA)
• Tanzania Motion Picture Teachers’ Association (TMPTA)
• Tanzania Video Library Association (TVLA)

6.xix ZANZIBAR INTERNATIONAL FILM FESTIVAL (ZIFF)
ZIFF is a significant film festival attracting international attention. 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.

6.xx NON-ALIGNED PRODUCTION COMMUNITY
There are a number of other associations (for example, TAIPA - Tanzania Independent Producers Association made up of 25 producers) and individuals that do not align with other associations but nevertheless have an interest in the success of the Tanzanian film sector.

7. LEGAL FRAMEWORK

The most commonly applied Film law is the Copyright and Neighbouring Rights Act of 1999 No. 7 as revised in 2002, 2003 and 2004. This provides a clear legal framework for the establishment of ownership of intellectual property including films and the various copyrighted elements that go into a film’s chain of title (music, screenplay, underlying works, acting and directing, etc.). Per the terms of the Act, many of the copyright duties including registration, enforcement and Copyright Management tasks are performed by COSOTA and COSOZA. The creators of the copyright license or assign all of their rights and interests in their work to the film’s rights holder, usually the producer, who typically sells all rights for a completed film to a distributor.

There is also the Films And Stage Plays Act (1976), which covers, amongst other things, the conditions and permissions required from the Minister in
order to film in Tanzania, and the ability of the government to close down any production deviating from its permit conditions. In line with this regulatory thrust, it is the Film Act that guides and governs the role and work of the Film Censorship Board.

However, Film industry issues are considered under various legislations including:

- Tanzania Broadcasting Services Act of 1993
- Tanzania Communications Act 1993
- The Tanzania Communications (Importation and Distribution) Regulations 2005

However, Film Activity is so cross-cutting, that legislation that will impact on film sector activity will likely be found in the following areas:

- Constitutional Law
- Administrative / Public Law
- Criminal Law
- Civil Law
- Commercial Law
- Company Law
- Labour Law
- Health Law
- Tax Law
- Banking Law
- Insurance Law
- Communications And Media Law
- Transport And Maritime Law
- Environmental Law
- Intellectual Property Law
- Energy Law
- Construction Law
- Agriculture Law

A full list of laws is attached in Annexure A.

8. TANZANIAN POLICY ENVIRONMENT

8.i Overview
The Film Industry is a sector in its own right, in need of a Policy Framework for development. However Film is also cross-sectoral, in that it also has to relate to other relevant sectoral policies. These include:

- Horizontal (such as information, or governance)
- Infrastructural (such as telecommunications or e-commerce)
- Vertical (such as education, tourism, manufacturing or health)
Consequently, in addition to developing and implementing a film-specific policy, other relevant policies will need to adjust to the exigencies and demands of the film industry in the knowledge economy. Importantly too, the Policy has to be flexible, and it has to be forward thinking. The rate of technological change that is affecting the film sector – and the speed with which it is opening opportunities – is immense, and the Policy needs to be flexible enough to respond to the future. In part that means not only removing legacy processes and operations, but also about shedding “legacy thinking”.

8.ii Vision 2025
When considering policy options to develop the economic aspects of the Tanzanian film sector, the most important over-arching policy position of the government is TANZANIA VISION 2025. The Vision is supported by a number of operational plans, with timeframes of one, five and fifteen years respectively.

There are three principal objectives of the Vision 2025 - which are;
- Achieving quality and good life for all;
- Good governance and the rule of law; and
- Building a strong and resilient economy that can effectively withstand global competition.

These objectives actually not only deal with economic issues, but also include social issues such as education, health, the environment and increasing involvement of citizens in working for their own development. The thrust of these objectives is to attain a sustainable development of the Tanzanian people, imagining the kind of Tanzania that the citizens of the country will be living in by the year 2025. This is envisaged to be a substantially developed society and a Middle Income country, with high quality livelihoods, and poverty a thing of the past.

Consistent with this vision, the Tanzania of 2025 should be a nation imbued with five main attributes;
- High quality livelihood.
- Peace, stability and unity.
- Good governance,
- A well educated and learning society; and
• A competitive economy capable of producing sustainable growth and shared benefits.

The film industry has significant potential as a contributor to Vision 2025, not only supporting the cultural aspects of the nation state, but also dramatically spearheading the economic growth required to drive the transformation as follows:

<table>
<thead>
<tr>
<th>VISION 2025 – ATTRIBUTES</th>
<th>Potential Film Sector Inputs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>High Quality Livelihood</strong></td>
<td>The Film Industry is a significant job creation vehicle, employing craftspeople, artisans, film industry specialists, small business suppliers and the broader business community throughout the value chain.</td>
</tr>
<tr>
<td>Ideally, a nation’s development should be people-centred, based on sustainable and shared growth and be free from abject poverty. For Tanzania, this development means that the creation of wealth and its distribution in society must be equitable and free from inequalities and all forms of social and political relations which inhibit empowerment and effective democratic and popular participation of social groups (men and women, boys and girls, the young and old and the able-bodied and disabled persons) in society. In particular, by the year 2025, racial and gender imbalances will have been redressed such that economic activities will not be identifiable by gender or race. All social relations and processes which manifest and breed inequality, in all aspects of the society (i.e., law, politics, employment, education, culture), will have been reformed.</td>
<td>The industry is particularly attractive to youth, but the flexibility of working hours, and relatively high salaries, are also attractive to women. There are very few jobs in the industry that are dependent on physical strength, so women tend to compete on an equal footing for equal pay. The physical requirements mean opportunities for the disabled too.</td>
</tr>
<tr>
<td><strong>Peace, Stability and Unity</strong></td>
<td>Film offers citizens the opportunity of crafting, shaping and communicating their own images, effectively demystifying cultural and ethnic differences, and promoting integration and unity of people. By filming in all parts of the country, it connects the regions to the centre. The film industry therefore can play a primary role in building a national identity, and is vital for</td>
</tr>
<tr>
<td>A nation should enjoy peace, political stability, national unity and social cohesion in an environment of democracy and political and social tolerance. Although Tanzania has enjoyed national unity, peace and stability for a long time, these attributes must continue to be cultivated, nurtured and sustained as important pillars for the realization of the Vision.</td>
<td></td>
</tr>
</tbody>
</table>

[Image of TARI logo]
Good Governance  
Tanzania cherishes good governance and the rule of law in the process of creating wealth and sharing benefits in society and seeks to ensure that its people are empowered with the capacity to make their leaders and public servants accountable. By 2025, good governance should have permeated the national socio-economic structure thereby ensuring a culture of accountability, rewarding good performance and effectively curbing corruption and other vices in society.

<table>
<thead>
<tr>
<th>Media literacy” – the access to film and media content; the awareness of how film and media works; the ability to decipher media messages, and the ability to craft media messages oneself using communication and production skills - has an outsized role to play. Citizens who are media literate will be better able to make informed choices with regard to the audiovisual content market. They will be better informed about what they want to see and better able to evaluate the implications of their choices. They will also be better able to protect themselves and their loved ones from harmful, offensive or undesired content and they will be more demanding of the kinds of content that reflect their own cultures and traditions.</th>
</tr>
</thead>
</table>

A Well Educated and Learning Society  
Tanzania envisions to be a nation whose people are ingrained with a developmental mindset and competitive spirit. These attributes are driven by education and knowledge and are critical in enabling the nation to effectively utilize knowledge in mobilizing domestic resources for assuring the provision of people’s basic needs and for attaining competitiveness in the regional and global economy. Tanzania would brace itself to attain creativity, innovativeness and a high level of quality education in order to respond to

| Film in education has potential uses for:  
1. those who teach WITH film  
2. those who teach ABOUT film, and  
3. those to teach HOW TO MAKE films.  
From the early days of the moving image, film was considered to be particularly useful for science education, because of its ability to record, expose and enhance the natural world through documentation and experience. It can also contribute to arts learning, including literature & language studies – not only as an interpretative tool but as a artistic model with its own narrative |
Development challenges and effectively compete regionally and internationally, cognisant of the reality that competitive leadership in the 21st century will hinge on the level and quality of education and knowledge.

and language that is itself worthy of study, scrutiny, and reflection. Even the process of filmmaking – the planning, the cooperation, the communication and resolution of a joint vision – is an important skill for today’s complex world. This film sector connects the workforce directly into the Knowledge and Information economies.

A strong and Competitive economy

Tanzania should have created a strong, diversified, resilient and competitive economy which can effectively cope with the challenges of development and which can also easily and confidently adapt to the changing market and technological conditions in the regional and global economy.

A well structured, managed and resourced film industry can contribute significantly to economic development, job creation and the distribution of wealth and opportunities to small businesses. It can also significantly impact on the tax revenue base of the country, allowing the diversion of revenues into poverty alleviation projects nationally. Developed and promoted as an economic powerhouse, Swahili language product in particular can connect to a huge regional market, supporting East African Community economic development and social integration on an unprecedented scale.

8.iii Culture

Within the current context, the leading Policy approaches to the film industry fall within culture. In particular, the Tanzania Culture Policy, ‘Sera Ya Utamaduni’ identifies the ways through which the Ministry of Information, Culture, Sport and Youth expects culture, including film, to serve social development goals. The policy contains a number of astute stipulations around the rights of every Tanzanian to enjoy culture, including the provision for Tanzanian broadcasters to devote airspace to Tanzanian productions and music.

In spite of this robust policy, most of the interventions applicable to the film sector are structured in terms of protection and management rather than sector development. While the potential of film as a catalyst for creativity and shared culture nationwide is alluded to within a broader cultural framework,
and there is specific mention of the obligation of the Cultural Industries to contribute to national economic development and there is no clear guidance of how that might be achieved. There is no policy position on how the country might maximise opportunities being opened by the knowledge economy, nor on the ability of the internet to share film culture nationally – and for economic returns - for the benefit of all Tanzanians. These “legacy processes” around culture policy create potentially significant conflicts of interest with IP and ICT. For instance, increased internet access and the global expansion of online video distribution may mean that in the future, filmmakers will simply publish their films online, in offshore websites, for Tanzanians to download at their leisure – something over which the Film Censorship Board will be able to have absolutely no control.

Perhaps more complex though is that while the Cultural Policy expounds national values, customs and traditions, it offers the film industry no clear understanding of how the Film Censorship Board should define and enforce “Tanzanian culture.” With a multiplicity of diverse cultures and traditions in the country, and no written guidance offered by the Film Censorship Board on how it makes its decisions and interprets its responsibilities, the current approach to delivery of the Cultural Policy is essentially conservative and non-democratic, and it creates a disabling rather than enabling environment for sector growth. For example; if a film is made by Tanzanian filmmakers about their experiences and lives in Tanzania, and it is in demand by Tanzanian citizens, is that not Tanzanian culture? The lack of any sort of answer to this question from the Tanzania Film Censorship Board, as well as their refusal to take any part in this democratic Public Sector process around national Film Policy, is indicative of the extreme sensitivity of the problem.

What this means is a significant gap in the policy environment around Sector development. Beyond the existing cultural fund, there is no guidance on how Tanzanian films and film culture could be guided and nurtured by strategic government interventions, nor is the potential scope of development funding, skills training and film education, business training and market access development that could be undertaken to improve a sector’s performance recognized.

8.iv IP / ICT
More positive is the national Intellectual Property Policy is currently under development. This will have the goal of:

- Stimulating and fostering creative, innovative and inventive culture among Tanzanians
- Transforming Tanzania into a country with a high level of IP awareness and IP knowledge
- Developing sustainable capacities to enable Tanzania to use IP as a vehicle for building competitive economy through the creation, innovation/inventions, utilization, acquiring, and protection of IP
- Using IP to build a prosperous Tanzanian society in all respects
- Inculcating business competitiveness through strategic use of IP tools: branding, trade marks, etc.

There are obviously clear parallels and opportunities (and challenges) here for the creative audio-visual industries. Furthermore, Film Production also has close linkages to the country’s ICT policy. As the policy preamble states, ICT impacts the way business is conducted, it facilitates learning and knowledge sharing, generates global information flows, empowers citizens and communities in ways that have redefined governance, and creates significant wealth and economic growth resulting in a global information society. The policy explicitly states the requirement to enable Tanzanians to participate meaningfully in the knowledge economy, and this is an important element missing from current policy approach to the Film Sector.

For foreign filmmakers, there are linkages to the Policies of Tourism, Trade and Investment Promotion. The main challenges here are not only to give the Film Sector equal treatment under the existing rules, but also to give film special treatment – the argument being that

a) a foreign film spending US$200 million for a temporary 12 week shoot in Tanzania cannot be assessed against existing investment criteria of infrastructure investment and permanent full time jobs, even though it would have significantly more impact that a US$5 million factory investment.

b) A foreign film spending $200 million is a significantly greater spend than the average tourist.
9. POLICY GAPS
As a result of the review project, the following Policy Gaps have been identified, and should inform the policy document.

9.i Film as Business
Tanzania’s predominately socio-cultural focus on the film industry does not comfortably acknowledge nor enable the industry’s potential economic impacts – either as it stands currently, not considering the future opportunities arising from technological change and regional market integration. While addressing how the film industry integrates with Cultural Policy, the Film Policy should explicitly be differentiated by focusing on the economic aspects of the film industry, and stressing the exploitation of the opportunities of the Knowledge Economy. The policy should embrace sector development and coordination, quality management, training and skills, film trade and export, and economic research. A clear and unambiguous policy statement to this effect is required. Economic statistics and impacts are vital for the development of this aspect.

9.ii Developmental Approach
The government’s regulatory focus is unintentionally hindering rather than assisting sector development. Film Policy should consciously move from being regulatory to enabling and developmental in approach, reflecting the government’s – and the private sector’s - interests in delivering on Vision 2025. This means creating a sustainable Tanzanian film sector (through audience development, film education and skills training, lifelong learning etc. nationally). An enabling environment for the sector is taken to mean a situation where filmmakers of all kinds and levels are actively encouraged to make films of all sorts and standards, and to distribute them through platforms (from cinema to dvd to broadcast to online) at price points set by the market.

9.iii Improved Sector Coordination
Currently the Tanzanian government addresses film industry needs in silos – although cooperation between COSOTA, BASATA, TRA and the Film Censorship Board on tax stamps is a positive step. Due to the broad range of Ministries and Agencies impacted by Film, the industry requires significantly closer cooperation between government departments in order to create the
enabling environment envisioned above. This requires a strong leadership role from government, and should be expressed in the policy.

There also appears to be disconnect between the significant foreign production happening in Tanzanian locations such as the Serengeti or the Kilimanjaro regions and the local film industry. Tanzania has the capacity to attract international productions, and through it, the potential to up-skill local talent and technical personnel, but this requires coordination between government departments in order to achieve it.

9.iv Whole-of-Government Approach
Government departments require a whole range of audio-visual content, from sales & marketing, corporate videos, promotion and technical films, public service announcements, in house training and even the basic communication of information. However, there is no direct connection between those “commissioners” and the local filmmakers who can provide those services. The policy should reflect how government can boost sector activity through improved, whole-of-government coordination of it's own requirements.

9.v Adoption of technological best practice
The policy must look beyond the current, “analogue”, bureaucracy-heavy regulatory environment to one where technology is used to support and facilitate sector development – from improved management and tracking of copyright to improved audience relationships and market research, to improved sector coordination, promotion and training.

For example, the Ministry of Information & Broadcasting (I&B), Government of India, is developing a dedicated online portal for operationalising the ‘single-window clearance’ system for foreign film production in India. The ‘Single Window Clearance for Film Shooting in India’ website is intended to include the data on various requirements such as custom clearances, visas, cultural sensibilities, as well as logistics, and a digital location library of panoramic images of potential production locations. The website will provide information on state-wise facilities like transport, hospitality, medical and other local information. A similar intervention would serve the cross-departmental requirements of promotion and coordination for foreign filmmakers in Tanzania.
9.vi Industry organisation / coordination
The film industry itself appears haphazard, uncoordinated and focused on problems rather than solutions. Governments always prefer industries to speak with one voice, and the policy should reflect the need for the film sector to manage its own affairs better.

9.vii Production Skills
Tanzanian film production currently takes place in a low skills environment. As a result the production quality of Tanzanian films is low, and the product outputs are unable to aggressively compete against internationally accepted standards. A key challenge therefore is that education and skills development for the film industry is not provided for under existing policies. Policy gaps for the development of production skills are many, but they include not only the provision of skills training in the form of short courses, but more formal, in-depth undergraduate level education (mooted by the industry in the form of a National Film School) that could significantly improve the skills base in the country. Also absent is the standardisation of skills, qualifications and expected learning levels in the industry as well as clearly defined career pathways for industry entrants and career mobility. Importantly, the Policy around Production Skills training should move government interventions from merely regulatory to enabling and developmental.

9.viii Technical Resources
There is a challenge with the availability of and access to affordable production equipment including cameras, sound and lighting. There is the additional absence of technical resources such as musical and effects tracks, making dubbing into Swahili and other languages extremely difficult and expensive.

9.ix Business Skills
One of the biggest challenges in Tanzania is the general lack of business skills in the industry. Financial, legal, business, rights management and sales and marketing – skills that are rarely taught in film courses. This is particularly problematic because the resulting skills gaps mean Tanzanian filmmakers are making unprofessional decisions when it comes to the sale and distribution of their products – which in turn is the cause of much of the anger and frustration in the market place. In order to extract the most value from the film industry value chain, the policy must express film business training.
9.x  Funding
Funding is a perennial film industry issue in every industry, in every country, and Tanzania is no exception. Given that there is a steady flow of people wanting to be filmmakers, there is never enough money to go around. Few private investors have proved prepared to risk investing in the production due to the low profitability of films released. The lack of funding results in an unhealthy environment where filmmakers treat production budgets (rather than exploitation of rights) as their main source of income. It has also created an environment when Aid Agencies are perceived as one of the sustainable sources of production funding in the country.

Film Policy should reflect the various stages of funding required for a national developmental strategy for the film industry; this should include funding protocols for filmmaking (screenwriting, development, pre- and post production, as well as for production) and distribution and marketing activities. Since these funds would be from government sources, the policy should also contain clear governance protocols, as well as transparent and accountable mechanisms to account for diversity and plurality of taste that will allow Tanzanian citizens a greater role in defining their own culture.

9.xi  Trust Issues
There is currently a conflict between the commercial interests of filmmakers and those of distributors. Because distributors understandably extract maximum value from a film – buying low and selling high - producers often receive little or no revenue from its commercial exploitation. As a consequence filmmakers focus on raising funds for filming, rather than building better products. The policy should reflect better cooperation between producers and distributors to build on areas of common economic interest.

9.xi  International Cooperation
With the growing globalisation of the film industry, Co-production Treaties have arisen as a way of promoting funding and cooperation. The effect of a Coproduction is that government funds from one Coproduction Treaty partner country can be spent in the location of the second Coproduction Treaty country. Morocco has used this strategy effectively to boost foreign filmmaking. The noted Policy gap is therefore one of greater International Cooperation and trade development for film production and content.
Access
An extension of international access is the lack of connectivity and networks with film-making decision makers who can fund and distribute Tanzanian films. Even where pools of interested commissioning editors exist – at the Durban FilmMart or DISCOP for instance – the costs of getting large numbers of Tanzanian filmmakers there to undertake sales and networking activities is prohibitively expensive. The policy should therefore reflect an intent to build better relationships and networks with the international and regional filmmaking community, as well as lobbying efforts to ensure that Tanzanian filmmakers can access existing regional funding where available.

Distribution and Audience Development
The success of the Tanzanian film industry depends on the connection to the potential audience for Tanzanian content. This direct connection will allow filmmakers to exploit their own products. There are also various revenue sources that are considered “secondary” such as public performance (in salons, on long distance buses, bars, etc.), secondary broadcast (cable retransmission, Internet retransmission, etc.), etc. that are also not currently being exploited. To build distribution, there must be a policy for audience development, to help to put film and film culture at the heart of the Tanzania cultural life.

Film in Education
Film Education has a role to play, not only in creating new filmmakers, not only in developing the next generation of audiences, but in making film central to Tanzanian cultural life and experience. Film policy must therefore begin with the activation and implementation of existing Film Learning options for the curriculum, and include the training of teachers and the provision to them of film related tools and materials. Internationally, studies have shown that education in schools can also be used to create a greater understanding and respect for the value of intellectual property among young people.

Piracy
Piracy is a further key problem being faced by filmmakers globally and in Tanzania. The widespread mindset in many countries is that piracy is not a crime, or at the very least is victimless. Most consumers who commit piracy do so because easy and cheap opportunities arise, or because they cannot
get the content any other way. However piracy denies producers and distributors a return on their investment in film production. The policy should support and expand existing efforts to tackle this problem including the ongoing reform of COSOTA and COSOZA so that it can respond to the function effectively. Ideally the policy should allow for education of the public on copyright issues, education of filmmakers on the measures they can take to secure their rights, and forward-thinking technological solutions that can be adopted to manage the issue. The policy should also seek reliable data about scale and trends concerning copyright infringements.

9.xvi Social Media
In the United Kingdom, their Film Policy Review noted: “By engaging with audiences through social media, it is easier to determine what people want, how they want to access it, and what they are prepared to pay – price-points for paid-for services being one crucial area of exploration when looking to combat copyright infringement and theft.” The policy should recognise that Social Media will have an increasing role to play in determining the success of the industry and of individual filmmakers within it.

9.xvii Research & Development
There is a pressing need for greater information film businesses can use digital technologies to improve audience engagement and create new revenue models. The uncertainty surrounding issues such as audiences’ preferences, their willingness to pay, and intellectual property rights are inhibiting the development of new business models. Research and Development (R&D) initiatives – by generating hard data and evidence – can significantly help to reduce these uncertainties.

10. SUMMARY OF POLICY RECOMMENDATIONS

• RATIONALISE POLICIES TO ENABLE FILM PRODUCTION TO CONTRIBUTE TO ECONOMIC DEVELOPMENT AND VISION 2025 OBJECTIVES

• DEVELOP A POLICY POSITION FOCUSED ON BUILDING THE FILM BUSINESS
• FORMALISE, HARMONISE AND COORDINATE GOVERNMENT’S FILM SECTOR ACTIVITIES

• DEVELOP A COMPREHENSIVE ENABLING ENVIRONMENT FOR FILM INDUSTRY DEVELOPMENT SPECIFICALLY INCLUDING FUNDING MECHANISMS

• ADDRESS, REFORM & OVERHAUL TREATMENT AND PRACTICE OF CENSORSHIP / FREEDOM OF EXPRESSION

• DEVELOP A COMPREHENSIVE AGENDA FOR IMPROVING PRODUCTION & DISTRIBUTION, FOCUSING ON SKILLS & EDUCATION, LEGISLATION AND BEST PRACTICE

• DEVELOP COMPREHENSIVE BUSINESS EDUCATION AND SKILLS TRAINING OFFERINGS FOR PRODUCERS

• DEVELOP FILMMAKING EDUCATION AND SKILLS TRAINING, INCLUDING SCRIPTWRITING AND CONTENT DEVELOPMENT FOR FILMMAKERS.

• DEVELOP A COMPREHENSIVE FILM CULTURE EDUCATION PROGRAMME, CONNECTING SCHOOLS AND AUDIENCES TO FILMS

• DEVELOP MARKETS & MARKET ACCESS OPPORTUNITIES

• BRAND TANZANIA LOCALLY AND INTERNATIONALLY AS A FILM CENTRE OF NOTE & COORDINATE FOREIGN INVESTMENT OPPORTUNITIES

• ENSURE ALL SECTOR DEVELOPMENT ACTIVITIES ARE TECHNOLOGY-INTEGRATED

• USE PRIVATE PUBLIC PARTNERSHIPS
11. STRATEGIES

The policy recommendations for film fall into the following broad strategy areas:

- COORDINATED GOVERNMENT
- FORMALISED INDUSTRY
- SKILLS & EDUCATION
- RESOURCES & FUNDING
- MARKETS & ACCESS
- INTERNATIONAL LINKS & COOPERATION

A: FORMALISED GOVERNMENT APPROACH

- RECOGNITION OF FILM AS BUSINESS
- GOVERNMENT STAKEHOLDERS CONFERENCE
- ESTABLISH MARKET DEFINITION
- OFFICIAL NATIONAL CONVERSATION ON FILM & CULTURE
- COMMERCIALISATION OF DEMAND-DRIVEN FILM INDUSTRY
- INSTITUTIONAL CHANGE / RATIONALISATION OF CORE AGENCIES
- FOCUS ON KNOWLEDGE ECONOMY / TECHNOLOGY ACTIVATION ACROSS SERVICES AND VALUE CHAIN
- CREATE “FILM COUNCIL” TO COORDINATE GOVERNMENT INTERESTS

B: FORMALISED INDUSTRY

- STANDARDS HARMONISATION AND INTEGRATION WITH EXISTING INDUSTRY OPERATIONS
- REGULAR STATISTICS & ECONOMIC INFORMATION
- IMPROVED SECTOR COMMUNICATION
- CONTRACTS, CHAIN-OF-TITLE STANDARDS
- TAX STAMP, ANNUAL STATISTICS, FEEDBACK TO CREATE BUSINESS CASE
- FILM INDUSTRY QUALITY STANDARDS
• ASSEMBLY OF STANDARDS – PERFORMANCE AND QUALITY ASSURANCE - AND THEIR APPLICATION IN THE FILM INDUSTRY

C: SKILLED INDUSTRY

• FILMMAKING SKILLS, KNOWLEDGE, TRAINING, EDUCATION
• ACCREDITATION AND STANDARDS OF QUALITY EDUCATION AT TRAINING INSITUTIONS.
• ACTIVATION OF FILM CURRICULUM AT SCHOOLS
• ENTREPRENEURSHIP AND BUSINESS TRAINING
• ON-GOING SKILLS TRAINING FOR PEOPLE IN THE INDUSTRY
• LIFELONG LEARNING FROM SCHOOL AGE TO DEGREE TO (NATIONAL) FILM SCHOOL

D: RESOURCED INDUSTRY

• RATIONALISATION OF EXISTING BUSINESS OFFERINGS; CREATE ENVIRONMENT FOR EQUAL ACCESS TO CURRENT INCENTIVES BY FILM BUSINESSES
• COMPREHENSIVE FILM FUNDING & FINANCING
• CO-OPERATIVES
• EQUIPMENT

E: MARKETS & ACCESS

• UNDERSTAND MARKET SEGMENTATION
• CLARIFICATION OF EXPORT OPPORTUNITIES & PROCESSES
• ADDRESS MARKET ACCESS BARRIERS
• IMPROVE MARKET KNOWLEDGE
• UNDERTAKE CUSTOMER RESEARCH
• AUDIENCE DEVELOPMENT

F: INTERNATIONAL COORDINATION

• PARTICIPATION IN INTERNATIONAL FILM BUSINESS TRADE FAIRS
• COORDINATED RESPONSE TO FOREIGN FILMMAKERS
• FAM TOURS
• CO-PRODUCTION TREATIES
• ACTIVATION OF EXISTING RELATIONSHIPS / OPPORTUNITIES

At a workshop in Dar Es Salaam on 9th and 10th September 2013, the Policy Recommendations were discussed and participants requested to identify strategies that would contribute to the delivery of the proposed Policy points. These recommendations are included in the Annexure C of this report.

12. CONCLUSION – OUTCOMES OF THE RESEARCH

The research programme has thrown up several vital activities that are required to keep the developmental momentum going. These include:

• Detailed Market Assessment – in particular to uncover the current and potential size of the regional film market for Tanzanian / Swahili films. This should address the market/consumer demands, demographics, physical locations, consumption (platform) preferences. This would further contribute to acceptance of film-as-business as per the policy recommendations.

• Education & Skills – Development of a National Film Education and Training Strategy for Tanzania including Investigation into the Feasibility of Establishing a National Film School

• Detailed Research on Centralised Government Film Offerings (Film Commissions / Foundations / Offices / Council) including Investigation into the Feasibility of Establishing a National Film Commission.

• Detailed economic impact assessment of the Tanzanian film industry, clarifying both the current and future economic impact of the sector. This should address the numbers of film production companies and their employment and supplier lists, and it should look at how the
monies from production flow through the supply base. This would facilitate acceptance of film-as-business as per the policy recommendations.

- Technological solution to coordinate inbound foreign production services (arising from Film Commission research) This should be a Private Public Partnership and involve the key government stakeholders – Tourism, Trade, EPZA, TIC, TRA – and principally use technology (online “portal”) as a means of coordination.

- Technology Audit of COSOTA (and possibly other processes.) This should look at the collection and monitoring activities of COSOTA and make recommendation of how technology can improve services and increase revenues.

- Development Programme - a Film Production skills programme, focusing on improving the quality of Tanzanian film, a Film Business Skills programme, focusing on improving the business aptitudes of Tanzanian producers and mobile Film Resources programme taking production equipment to the regions.
## ANNEXURE A: LIST OF BUSINESSES IN FILM VALUE CHAIN

<table>
<thead>
<tr>
<th>CONCEPT</th>
<th>PRODUCTION</th>
<th>DISTRIBUTION</th>
<th>EXHIBITION</th>
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</thead>
<tbody>
<tr>
<td>Producers – Stills Photography</td>
<td>Crewing Agents</td>
<td>Advertising, Marketing, Promotion</td>
<td>Broadcasters</td>
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<tr>
<td>Producers – Television</td>
<td>Casting Agents</td>
<td>Design companies</td>
<td>Cinemas</td>
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<td>Script writers</td>
<td>Actors</td>
<td>DVD duplication</td>
<td>Websites</td>
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<tr>
<td>Producers – Feature Film</td>
<td>Crew / Labour</td>
<td>Lawyers / Copyright, IP, Contract, Labour</td>
<td>Video Stores</td>
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<tr>
<td>Producers – Television Commercials</td>
<td>Accountants / Auditors</td>
<td>Packaging Companies</td>
<td>VOD services</td>
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<td>Producers – Animation / Video Games</td>
<td>Camera</td>
<td>Printing / Photocopying</td>
<td>Mobile / Cell phone services</td>
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<td></td>
<td>Computer effects &amp; graphics</td>
<td>Website designers</td>
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<td></td>
<td>Distributors</td>
<td>DVD stores</td>
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<td></td>
<td>Equipment Rentals</td>
<td>Video stores</td>
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<td></td>
<td>Film editing and projection</td>
<td>Street Salespeople</td>
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<td>Finance &amp; Banking</td>
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<td>Grips</td>
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<td>Insurance</td>
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<td></td>
<td>Lawyers / Copyright, IP, Contract, Labour</td>
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<td>Lighting &amp; Sound</td>
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<td>Location Management</td>
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<td>Location scouting</td>
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<td>Make-up</td>
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<td></td>
<td>Music &amp; sound</td>
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<td></td>
<td>Photography</td>
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<td></td>
<td>Production Accounting</td>
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<td></td>
<td>Scriptwriting</td>
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<td>Set construction</td>
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<td>Special effects / VFX</td>
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<td></td>
<td>Titles</td>
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<td></td>
<td>Transport accommodation</td>
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<td></td>
<td>Video Post Production</td>
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<td></td>
<td>Wardrobe</td>
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<tr>
<td>TERTIARY</td>
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<tr>
<td></td>
<td>Accommodation owners</td>
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<td></td>
<td>Booking services</td>
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<td>Car &amp; Van Hire</td>
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<td></td>
<td>Construction,</td>
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<td>Category</td>
<td>Examples</td>
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<tr>
<td>thatching, building trades</td>
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<td>Courier &amp; Freight services</td>
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<tr>
<td>Environmental services</td>
<td>gardening, bush clearing, Florists, Garden Centres, Tree Nurseries.</td>
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<td>Hair Salons, Beauty Parlours</td>
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<tr>
<td>Laundry services</td>
<td>ironing only, full laundry, sewing and repairs</td>
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<tr>
<td>Maintenance services</td>
<td>vehicles, plant &amp; equipment</td>
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<td>Marketing services</td>
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<tr>
<td>Metal workers</td>
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<tr>
<td>Rugs, wall hangings, furniture, textiles, art</td>
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<tr>
<td>Saddlers, saddles &amp; leather goods</td>
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<tr>
<td>Stationery, printing, copying, filing</td>
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<tr>
<td>Taverns, bars and restaurants</td>
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<tr>
<td>Tour guides / Chaperones</td>
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<td>Tour operator services</td>
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<td>Training services</td>
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<tr>
<td>Transport - taxi services, tours, trips, airport transfers</td>
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<tr>
<td>Travel agencies</td>
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</table>
ANNEXURE B: TANZANIAN LAWS AFFECTING FILM INDUSTRY

Constitutional Law
Constitution of the United Republic of Tanzania

Administrative / Public Law
Civil Service Act, 1989
Public Procurement Act, 2004 - (Act No. 21/04)
Public Procurement Regulations 2005 (Goods, Works, Non-Consultant and Disposal of Public assets by Tender)
Public Procurement Regulations 2005 (Selection and Employment of Consultant)
The Armaments Control Act, 1991
The Citizenship Act, 1995
The Executive Agencies (Amendments) Act, 2009
The Fire And Rescue Services Act, 1985
The Immigration Act, 1995
The Local Government Laws (Miscellaneous Amendments), Act 2006 - (Act No. 13/06)
The Local Government Service Act, 1982
The Non-Governmental Organisations Act, No. 24 of 2002
The Statistics Act, 2002 - (Act No. 1)
The Tanzania Citizenship Act, 1995 (Act No. 6/95)
The Tourism Act, 2008 (Act No. 29/08)
The Vocational Educational and Training Act, 1994
The Vocational Educational and Training Act - Cap. 82 of the Revised Edition 2002

Criminal Law
The Anti-dumping and Countervailing measures Act, 2004
The Anti-Money Laundering Act, 2006 - (Act No. 12/06)
The Arms and Ammunition Act, Ch 223
The Drugs and Prevention of Illicit Traffic in Drugs Act, 1995 - (Act No. 9/95)
The Prevention Of Terrorism Act, 2002
The Prevention of Corruption Act 2002
Civil Law
The Law of the Child Act, 2009

Commercial Law
Special Economic Zones Act, 2006
The Export Processing Zones (Amendments) Act, 2006 (Act No. 3/06)
The Standards Act, 2009
The Tanzania Investment Act, 1997
The Tanzania Trade Development Authority Act, 2009
TanTrade Act 4 of 2009

Company Law
Business Activities Registration Act 2005
Business Activities Registration Act, 2007
Companies Act 2002
Fair Competition Act 2003
The Business Licensing Act 1972

Labour Law
Pensions Laws (Miscellaneous Amendments) Act, 1981
The Contractors Registration (Amendment) Act, 2008
The Employment and Labour Relations Act, 2004 - (Act No.6/04)
The Occupational Health And Safety Act, 2003
The Organization of Tanzania Trade Unions Act, 91 - (Act No 20 / 91)
The Workers Compensation Act, 2008
Trade Unions Act, 1998
Zanzibar labour Act 1997

Health Law
Tanzania Food, Drugs and Cosmetics Act No. 1 of 2003
The Disabled Persons (Care And Maintenance) Act, 1982
The Environmental Health Practitioners (Registration) Act, 2007 - (Act No. 20/07)
The National Health Insurance Fund Act, 1999
The Public Health Act, 2009

Tax Law
Car Benefit Tax Act, 1991
Income Tax Act, 2004 - (Act No. 11/04)
Port Services Charges Act - Cap. 264 of the Revised Edition 2002
The Airport Service Charges Act - Cap. 365 of the Revised Edition 2002
The East African Community Customs Management Act, 2004
The Foreign Commercial Vehicles Licensing Act, 1970
The Foreign Vehicles Transit Charges Act - Cap. 84 of the Revised Edition 2002
The Motor Vehicles (Tax on Registration and Transfer) Act - Cap 124 of the Revised Edition 2002
The Motor Vehicles (Tax on Registration and Transfer) Act, 1972
The Tanzania Revenue Authority Act, 1995
The Value Added Tax Act, 1997
The Value Added Tax Act, Ch 148 Revised 2006

Banking Law
Bank of Tanzania Act, 2006
Finance Act 2004
Foreign Exchange Act, 1992
The Banking And Financial Institution Act, 2006
The Financial Laws (Miscellaneous Amendments) Act, 2003
The Foreign Exchange (Bureau de Change) Regulations, 2008
The National Microfinance Bank Incorporation Act 1997

Insurance Law
The Insurance Act 1996
The Insurance Act, 2009

Communications And Media Law
Tanzania Broadcasting Services Act of 1993
Tanzania Communications Act 1993
Tanzania Communications Regulatory Authority 2003
The Broadcasting Services Act 1993
The Film and Stage Plays Act 1976
The Records and Archives Management Act, 2002 - (Act No. 3)
The Tanzania Broadcasting (Content) Regulations 2005
The Tanzania Communications (Access and Facilities) Regulations 2005
The Tanzania Communications (Broadband Services) Regulations 2005
The Tanzania Communications (Consumer Protection) Regulations 2005
The Tanzania Communications (Importation and Distribution) Regulations
2005
The Tanzania Communications (Installations and Maintenance) Regulations 2005
The Tanzania Communications (Interconnection) Regulations 2005
The Tanzania Communications (Licensing) Regulations 2005
The Tanzania Communications (Quality of Service) Regulations 2005
The Tanzania Communications (Tariffs) Regulations 2005
The Tanzania Communications (Telecommunication Numbering and Electronic Address) Regulations 2005
The Tanzania Communications (Type Approval of Electronic Communications Equipments) Regulations 2005
The Tanzania Communications Regulatory Authority Act, 2003

Transport And Maritime Law
Aerodromes Regulations April 2007
Tanzania Civil Aviation Act (Consolidated)
The Civil Aviation (Aerworthiness) Regulations, 2006
The Civil Aviation (Aircraft Registration and Marking) Regulations, 2006
The Civil Aviation (Ground Handling Regulations, 2007
The Civil Aviation (Licensing of Air Services) Regulations, 2006
The Civil Aviation (Rules of the air and air traffic control) Regulations, 2006
The Civil Aviation (Security) Regulations, 2007
The Railway Act, 2002 - (Act No. 4)

Environmental Law
Fisheries Act 2003
The Animal Welfare Act, 2008
The Dar Es Salaam Water And Sewerage Authority Act, 2001
The Deep Sea Fishing Authority (Amendment) Act, 2007 (Act No. 17/07)
The Environmental Management Act, 2004 - (Act No. 20/04)
The Forest Act, 2002 (Act No. 14)
The Tourism Act 2008
The Urban, Water Supply Act, 1981
The Water Laws (Miscellaneous Amendments) Act, 1999
The Water Resources Management Act, 2009
The Water Supply and Sanitation Act, 2009
The Water Utilization (Miscellaneous Amendments) Act, 1997
The Waterworks Act
The Wildlife Conservation Act, 2009
Intellectual Property Law
Merchandise Marks Act 1963
The Copyright and Neighbouring Right Act, 1999
The Patents Act, 1987 - (Act No. 1/87)
The Trade and Service Marks Act, 1986 - (Act No. 12/86)

Energy Law
The Electricity Act, 2008 (Act No. 10/08)

Construction Law
The Engineers registration act 1997

Agriculture Law
The Plant Protection Act, 1997
The Plant Protection Regulations, 1997
The Veterinary Act, 2003
ANNEXURE C: STAKEHOLDER INPUTS

At a workshop in Dar Es Salaam on 9th and 10th September 2013, the Policy Recommendations were discussed and participants requested to identify strategies that would contribute to the delivery of the proposed Policy points.

The policy recommendations for film fall into the following broad strategies:

- COORDINATED GOVERNMENT
- FORMALISED INDUSTRY
- SKILLS & EDUCATION
- RESOURCES & FUNDING
- MARKETS & ACCESS
- INTERNATIONAL LINKS & COOPERATION

Stakeholder inputs on the above listed areas follow:

A: FORMALISED GOVERNMENT APPROACH

- "There should be a recognition of the Industry"
- "There should be establishment of FFE.....Film Friendly Environment"
- "Local authorities be equipped with the regulatory framework recommendations needed to optimize the process of cooperation with film production"
- "Establish an independent government supported board which will be a one stop shop for all activities in the film industry"
- This Board will also deal with:-
  * Rating of films
  * Data Collection center
  * Education and information center
  * Research and development center
  * Revenue collection agency for TRA
  * Consultation Agency

B: FORMALISED INDUSTRY

- Compulsory membership of recognized industry associations
• Raise the capacity of target groups to develop Film Friendly capacities/to better meet the needs of international production

C: SKILLED INDUSTRY

• Skills training should aim at:
  o Unskilled but talented individuals already working in the industry
  o Aspiring professionals who cannot afford long term courses
  o Talent working in other professions who are considering switching professions

• The areas to be developed for skills training and education:
  o Content development – scriptwriting, etc
  o Business management – fundraising, managing funds and project management
  o Production – preproduction (casting etc), production (camera, light, acting, etc) and post production (editing and animation)
  o Marketing and distribution – Marketing end product, various chains of distribution etc
  o Film Theory – history of film, film critique, etc

• Education should be through a National Film School that will set the standard for Tanzanian film industry.
• Entry level should be Form Four certificate (like VETA) allowing entrants to start and complete certificates and diplomas. This is where the skills training happens
• Another level of entry is Form Six certificate and entrants can go onto getting a degree (BA)
• Eventually Masters degree can be offered to people with a Bachelor degree
• Entry should primarily consider talent and not points or marks to ensure that the talented entrants are selected.
• Development of curriculum and teaching material should be done strictly in collaboration with professionals in Tanzania (through their

5 Film Theory is specifically aimed at long term education not for short term skills training
professional body) to address the needs and the environment of Tanzania.

- Under NACTE system with emphasis on skills training

**D: RESOURCED INDUSTRY**

- Government should play its part in providing at least seed funding for film professionals who apply for international funding.
- Government should provide guarantee fund or scheme to ensure to tap into other resources than the National Film Fund
- Government will set up a national film fund that will be financed by various incomes DIRECTLY to ensure that the fund continuously is well funded and not vulnerable to the existing political, economic situation.
- Funding mechanism will consist of direct payment from the following revenues (before it is transferred to Treasury) for example:
  - National Lottery – 5%
  - (ringfenced) Sale of tax stamp – 5%
  - Sale of set top boxes or broadcast licenses – 2%
  - Tourism agencies – 1%
  - Annual budgets of Culture and Communication – 1%
- Fund should be audited by CAG
- Fund overseen by fund manager but under Professional body
- Professional body accountable to Prime Minister’s office
- Distribution of funding should be equitable to ensure that regional bodies get funding

**E: MARKETS & ACCESS**

- To break distribution monopoly:
  - Revamp/Reintroduce cinema hall in each district down to community level
  - Film to be viewed first in cinema halls for specified period before mass distribution
  - Ban informal viewing bandas (unregulated/dangerous)

- Regional incentives to promote film upcountry (regulated)
• Corporate organizations/individuals be given tax breaks and incentives for specific period to support film (PPP)
• Build closer ties direct film stakeholders
• TV and Cables – there should be no payment to air local film with quality local content (education and documentary should be free)
• The TV and cables should pay to the local film makers for airing their films
• No station can own copyright
• There should be National film awards to rate the best films of the year
• There should be minimum rate card for quality local produced film

F: INTERNATIONAL COORDINATION

• Offer high competitive incentives for foreign film makers
• There should be special fund to support the film industry, stakeholders, associations, hotels, airlines and all other business that support and promote local film
• Encourage Co productions (MoUs) with other countries, open markets
• There should be Tanzania Film Trust to provide loan guarantee for local film production, technical consultation etc.
• Cooperation among Government institutions and Private institution with common objectives for PPP initiative for the promotion and country branding through film