The **AFRICAN** *FILM* Industry

Trends, Challenges and Opportunities for Growth

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This publication was made possible
by the support of the
People's Republic of China

Africa's booming film and audiovisual industry

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

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

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

The film and audiovisual industry in Africa has the potential to create over

20 **million jobs**

and generate US$20 billion in revenues per year

unesco

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Foreword

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

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

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

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

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

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

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

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

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

Executive summary

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

Overall, the film and audiovisual sector in Africa remains historically and structurally underfunded, underdeveloped and undervalued, generating only US$5 billion in annual revenue out of a potential US$20 billion, according to the Pan African Federation of Filmmakers (FEPACI).[1] This report shows that today, many aspects of the industry are still informal, with only 44% of countries having an established film commission and 55% of countries having a film policy. Regulations, when they do exist, are sometimes seen as obstacles rather than enablers. Piracy remains rampant and two-thirds of countries estimate that at least 50% of the potential revenue of the sector is lost to the illegal exploitation of creative audiovisual content, which in many cases, deters structured investment. The education gap is wide: degree programmes are too few and far between and largely inadequate compared to local needs, with curricula that still remain more theoretical than practical and do not keep up with the pace of technological advancement in more developed markets.

Challenges also persist in sensitive areas such as gender equality, particularly in the Central African region where almost all respondents estimate the share of women in films to be less than 10%. In the Central and West Africa regions, 50% of respondents estimate the share of women to be also below 10%. However, several Arabic-speaking and English-speaking countries, including Tunisia, Morocco, Nigeria, Kenya, South Africa, Rwanda and Zimbabwe, showed encouraging dynamics, with 30% or more of women in front of and behind the camera. Regarding freedom of expression, little progress has been observed in recent years: 87% of respondents report that there are explicit or self-imposed limitations to what can be shown or addressed on screen.

From an infrastructure perspective, the distribution segment of the African film and audiovisual value chain is undergoing profound changes. Africa's cinema network is already the least developed in the world with a total of 1,651 screens, namely one per 787,402 people. As the COVID-19 pandemic shut down cinemas across the continent for the better part of a year, it exacerbated the worry that cinema distribution may forever fail to take off in some countries. Nevertheless, the sector does present some bright spots. For example, before the pandemic, new French investments in francophone West Africa, Morocco and Tunisia were expected to triple the number of screens in the region by 2024.[2] Most impressively, Nigeria emerges as a true success story, showing a 200% increase in cinema locations between 2015 and 2020, with the total number of Digital Cinema Initiative (DCI) compliant[3] screens reaching 237 in 2020. Home-grown Nollywood films now rival Hollywood blockbusters at the box office.

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

However, the real game changer for the African film and audiovisual industry is the ongoing digital revolution, which started some 20 years ago and was accelerated by the COVID-19 pandemic. Today, technology, affordable digital film equipment and the new ability to distribute but also monetize content directly to consumers via online platforms (from YouTube, other social media and Netflix to local mobile video services) is giving rise to a new economy for African content creators which bypasses traditional gatekeepers. In countries like Kenya, Rwanda, Ethiopia and Senegal, for instance, new generations of filmmakers are now able to live from the online revenue generated by their work.

Introduction

OBJECTIVES OF THE STUDY

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

A NEW GLOBAL AWARENESS OF THE POTENTIAL OF THE CREATIVE INDUSTRIES

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

International Year of Creative Economy for Sustainable Development by the United Nations General Assembly and Year of Arts, Culture and Heritage by the African Union.

Globally, CCIs are estimated to generate about US$2.25 trillion annually (3% of the global GDP) and to employ 30 million people worldwide.[5] However, Africa and the Middle East represent only about 3% (US$58 billion) of this global trade.[6] Considering the dynamism and global cultural influence of Africa's creative sectors, this constitutes a major untapped opportunity for African countries seeking to diversify their economies. CCIs are also proven to be one of the most innovative and resilient sectors in times of crisis, employing a large number of young people and women in high-skilled jobs while also encouraging entrepreneurship. More specifically, the film and audiovisual industry accounts for US$5 billion in GDP in Africa, employing an estimated 5 million people. With further investment, FEPACI estimates the sector has the potential to create over 20 million jobs and generate US$20 billion in annual revenues.[7]

This surge has also attracted cautious institutional interest with early commitments from the Creative Industry Financing Initiative (CIFI) for fashion, film, information technology and music by the Central Bank of Nigeria;[8] Fashionomics, the fashion investment programme by the African Development Bank;[9] the creative industry facility by Afreximbank;[10] and the series of investment facilities for film, music, gaming and fashion by East Africa's HEVA Fund;[11] to highlight but a few. These initiatives reflect increasing confidence in CCIs and provide information necessary for further commercial investment and positive action by governments.

DEFINITION OF THE TERM "FILM AND AUDIOVISUAL INDUSTRY"

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

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

The terms "film and audiovisual industry" and "film and audiovisual sectors" have been used interchangeably although in the pan-African context, they can refer to significantly different situations. Indeed, the continent presents a variety of creative ecosystems in which emerging film and audiovisual powerhouses such as Nigeria, South Africa, Morocco and Egypt sit side by side with countries that have only a handful of film professionals, while the majority of nations stand somewhere in the middle.

> **"**
> *We are trying to do something structural as well as finding conjunctural solutions. We need to advance the status of the artist, the filmmaker and their rights, especially the access to decent social security coverage.*

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

THE IMPACT OF COVID-19

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

METHODOLOGY AND SOURCES

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

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

The methodology involved the following:

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

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

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

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

- Peer review by African film and audiovisual experts.

NOTES

1. https://aptantech.com/2016/09/africas-film-industry-can-grow-to-20-billion-create-20-million-jobs

2. https://adweknow.com/entretien-frederic-godfroid-directeur-operations-afrique-pathe-gaumont

3. Digital Cinema Initiatives (DCI) refers to the organization representing the six major Hollywood studios.

4. https://www.digitaltveurope.com/2020/10/01/african-svod-market-to-grow-by-five-times-by-2025

5. UNESCO, 2018. Global Report: *Re|Shaping Cultural Policies*.

6. https://en.unesco.org/creativity/sites/creativity/files/global_report_fact_sheet_en.pdf

7. https://aptantech.com/2016/09/africas-film-industry-can-grow-to-20-billion-create-20-million-jobs

8. https://medium.com/@atcg/safeguarding-a-creative-and-cultural-moment-df0a9f5505cf#_ftn14

9. https://medium.com/@atcg/safeguarding-a-creative-and-cultural-moment-df0a9f5505cf#_ftn15

10. https://medium.com/@atcg/safeguarding-a-creative-and-cultural-moment-df0a9f5505cf#_ftn16

11. https://medium.com/@atcg/safeguarding-a-creative-and-cultural-moment-df0a9f5505cf#_ftn17

Information and data by region

This summary has been conducted
using data provided by public authorities and
consultations with different stakeholders.

CENTRAL AFRICA

Population:
209.1 million

Average GDP per capita:
US$5,413.1

Median age: **18.8 years**

Urban population: **53.7%**

Mobile phone penetration rate:
66.4%

Internet penetration rate:
19.1%

Burundi
Cameroon
Central African Republic
Chad
Congo
Democratic Republic of the Congo
Equatorial Guinea
Gabon
Sao Tome and Principe

Film policy

45%

Proportion of **Women** in the film industry

98% report **0-10%**

85 films produced per year

24 cinema screens

167 private television **channels**

Public funding for film: **0%**

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

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

Share of revenues lost to **piracy**:

**40%** report above **50%**

60% report from **25 to 50%**

PROFILE

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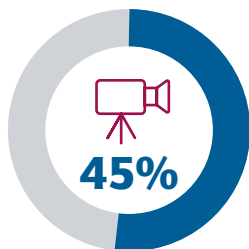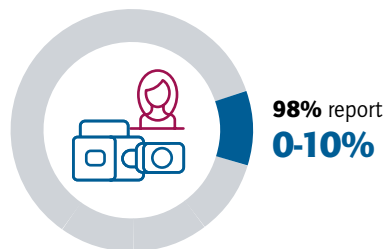
DIFFICULTIES

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

PERSPECTIVES

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

EASTERN AFRICA

Population:
494 million

Average GDP per capita:
US$5,932.9

Median age: **21.9 years**

Urban population: **36.4%**

Mobile phone penetration rate: **71.4%**

Internet penetration rate: **24.3%**

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

Film policy

43%

Proportion of **Women** in the film industry

50%	report	**0-10%**
17%	report	**10-20%**
8%	report	**30-40%**
25%	report	**40-50%**

1 525 films
produced per year

249 cinema screens

376 private television **channels**

Public funding for film: **14%**

Intellectual property/Copyright policy: **86% yes**

Limits to freedom of expression: **93% yes**

Share of revenues lost to **piracy**:

43% report above **75%**

21.5% report from **50 to 75%**

28.5% report from **25 to 50%**
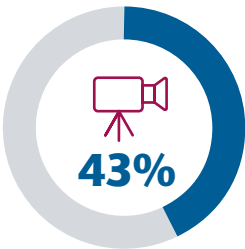
7% report under **25%**

PROFILE

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

DIFFICULTIES

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

PERSPECTIVES

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

NORTHERN AFRICA

Population:
238.5 million

Average GDP per capita:
US$10,292.5

Median age: **27.4 years**

Urban population: **63.9%**

Mobile phone penetration rate:
110.7%

Internet penetration rate:
46.4%

Algeria
Egypt
Libya
Mauritania
Morocco
Tunisia

Film policy

50%

Proportion of **Women** in the film industry

16.7%	report	**0-10%**
50%	report	**20-30%**
16.7%	report	**30-40%**
16.7%	report	**50% or more**

309 films produced per year

285 cinema screens

88 private television **channels**

Public funding for film: **50%**

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

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

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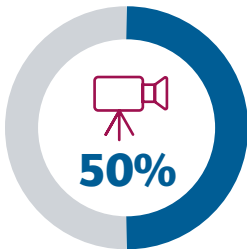
84% report above **50%**

PROFILE

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

DIFFICULTIES

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

PERSPECTIVES

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

SOUTHERN AFRICA

Population:
228.1 million

Average GDP per capita:
US$6,665

Median age: **20.7 years**

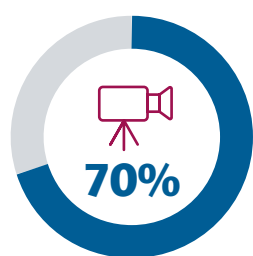Urban population: **43.7%**

Mobile phone
penetration rate:
93.2%

Internet
penetration rate:
31%

Angola
Botswana
Eswatini
Lesotho
Malawi
Mozambique
Namibia
South Africa
Zambia
Zimbabwe

Film policy

70%

Proportion of Women
in the film industry

30%	report	**0-10%**
20%	report	**10-20%**
10%	report	**20-30%**
40%	report	**30-50%**

237 films
produced per year

803 cinema screens

95 private television **channels**

Public funding for film: **60%**

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

Limits to freedom
of expression: **80% yes**

Share of revenues
lost to **piracy**:

30% report above **75%**

30% report
from **50 to 75%**

10% report
from **25 to 50%**

30% report under **25%**

PROFILE

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

DIFFICULTIES

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

PERSPECTIVES

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

WESTERN AFRICA

Population:
501.7 million

Average GDP per capita:
US$3,125.5

Median age: **18.9 years**

Urban population: **45.9%**
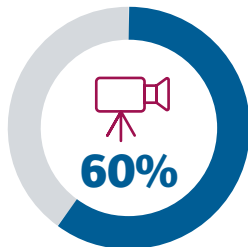
Mobile phone
penetration rate:
96.7%

Internet
penetration rate:
23.8%

Benin
Burkina Faso
Cabo Verde
Côte d'Ivoire
Gambia
Ghana
Guinea
Guinea-Bissau
Liberia
Mali
Niger
Nigeria
Senegal
Sierra Leone
Togo

Film policy

60%

Proportion of **Women**
in the film industry

50%	report	**0-10%**
21,5%	report	**10-20%**
21,5%	report	**30-40%**
7%	report	**50% or more**

3 393 films
produced per year

292 cinema screens

331 private television
channels

Public funding for film: **47%**

Intellectual property/
Copyright policy: **93% yes**

Limits to freedom
of expression: **73% yes**

Share of revenues
lost to **piracy**:

21% report above **75%**

14.5% report
from **50 to 75%**

50% report
from **25 to 50%**

14.5% report under **25%**

PROFILE

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

DIFFICULTIES

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

PERSPECTIVES

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

The AFRICAN FILM Industry

Trends, Challenges and Opportunities for Growth

The UNESCO 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions provides Parties with rights to adopt policies and measures to ensure equal access to art including in digital form and access to the means of expression and dissemination for ensuring the free flow of ideas by word and image. It provides a legal weight to the concept of cultural goods and services as vectors of identity, values and meaning and thus must not be treated as mere commodities or consumer goods. Films are one of such "cultural goods" that carry significant "cultural values", witnessing historical moments, evoking deep emotion, challenging norms and prejudices and bringing people together. The film industry is one of the major cultural industries all around the world, including in Africa.

Creative talents are abundant in Africa, but do they have means to produce and disseminate their films? Do people in Africa have means to watch locally produced films along with films from other countries?

This UNESCO publication on the African film industry gives a snapshot of the tendencies of the Pan African film sector, challenges and opportunities for growth. As a tool for reflection and action, it is an open invitation to African policymakers and film pratictionners to come together for further dialogue and for reinforced and concerted action in favour of the film sector. Taking one's place in the world of cinema requires collaboration and knowledge exchange, effective regulatory frameworks, structuring events, and most of all policies that recognise that culture binds a nation together and prepares it for dialogue with others.