

Transnational Television in Sub-Saharan Africa

By

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Introduction

Television is less developed in Africa than in any other continent. Fewer people have a television set at home and there are fewer TV stations transmitting per head of population than on any other continent.¹ Television in sub-Saharan countries is characterised by the following features:

- The dominance of state-owned and -controlled broadcasting.
- Broadcasting that is for the most part national, rather than local or regional.
- Dominance of imported content, mainly from Europe and the United States.
- Dominance of three European languages: French, English and Portuguese.
- Under-investment and poverty of facilities leading to low levels of local production.
- Low levels of inter-African co-operation in television production, exchange and marketing.

Each of these factors has also slowed or hindered the development of transnational television. The market is very limited, the risks are high and the potential profit for commercial ventures is small. But at the start of the 21st century there are signs of change and of the beginnings of continent-wide activity

that will begin to shape much of the future of African TV in a different way.

European influence continues to guide the development of African TV. This is not necessarily always something that comes direct from Europe; it happens because of the linguistic legacy that the colonial powers bequeathed the continent for good or ill. As noted earlier, European languages dominate African television, and chiefly this means English and French, with the less widespread addition of Portuguese. It means that these three languages define three broadly different television landscapes, certainly so far as transnational television activity is concerned.² US influence and input is now also of growing importance, mainly in anglophone countries. Similarly, Brazilian involvement and influence is beginning to be seen in lusophone countries.

Transnational Television in an African Context

In contrast to radio, which crossed national boundaries from its earliest days, depending as it does on areas of the electro-magnetic spectrum that carry much further, television for many years, was broadcast within the boundaries of a particular country. The exception to this rule was television channels that spilled over national

boundaries. For instance, populations of the two capitals of the two Congos, on either side of the Congo River, have for several years been able to watch television services from the other country. People in northern areas of Tanzania could watch Kenyan TV in the 1960s, twenty-five years before TV eventually came to Tanzania. Similarly, people in Botswana and Lesotho could watch South African TV long before they had their own national TV stations. Aside from these, most services are contained within the boundaries of the nation-state. Broadcasting frequency bands are pre-planned and internally coordinated through the International Telecommunications Union (ITU) to avoid mutually harmful inference between neighbouring countries. The current international frequency assignment plans for television are included in the regional agreements established by the ITU and adopted by signatory countries. Currently, the VHF and UHF bands for television are set between 174MHz and 470MHz to 854 MHz, according to the Geneva Plan of 1989 for Africa and neighbouring countries. These regulations require that all medium and high power frequencies are coordinated with neighbouring countries so as not to cause intentional trans-border interference. Any new frequency or relation of a frequency or increase in transmitter power of a medium or high power transmitter situated within approximately 400km from any border of South Africa's neighbours (Namibia, Botswana, Zimbabwe, Swaziland, Lesotho or Mozambique), to take just one important example, would require extensive bilateral negotiations. Although this planning and coordination takes place, in many instances trans-border spillage is unavoidable.ⁱⁱⁱ

TV in Africa, with a few exceptions, was introduced after each of the new states had achieved independence, and

at a time when government monopoly over the electronic media had been well established. Links with the former colonial powers were reflected to some extent in the content and style of the output. This was especially so in the former French colonies. The close links that the majority of francophone states maintained with France led to a dependency on programmes from France and on news images sent via satellite, although the state-run national television stations exercised control over their programming.^{iv}

Advances in television technology, together with a relative liberalization of the media and the phenomenon of globalization, led to the growth of transnational television activity in Africa, starting during the last decade of the twentieth century. The synergies between telecommunications, information technology and electronics all increased the possibilities for satellite television business in Africa.

There were three main ways for transnational television to develop at this stage in Africa's media development. One was to reach general populations through existing terrestrial stations. For this to happen, links needed to be made with these stations. The second way to go was similar to the route taken by several entrepreneurs in Europe and Asia - the direct to home satellite television service, as demonstrated most successfully by BSkyB in the UK and Star TV in South Asia. The third way was to use cable or MMDS - Multipoint Multichannel Distribution Service - to bring satellite television services to households who paid a subscription for them to be provided without the need for a satellite dish.^v

However, for any of these three developments to occur, changes in the political and cultural sphere were necessary. The more liberal atmosphere necessary for transnational television to grow was slow to develop in many parts

of Africa. To some extent it is still to emerge in some countries. But in most of the 48 sub-Saharan states, deregulation of some kind has lifted restrictions on broadcasting activities, formerly a government monopoly in every African country. This has enabled not only the emergence of several hundred private radio stations but also allowed the retransmission of international shortwave services on local FM frequencies. This is how one can hear France's international radio service, RFI (Radio France International) as well as the BBC World Service on local FM frequencies in the capitals and major cities of many countries. The same liberalization that has allowed this development has also opened the market to the wider distribution of satellite TV services, both private and state funded. It has also permitted the establishment of a growing number of private commercial stations.

Today, transnational television activities in Africa can be grouped into five categories:

1. Terrestrial cross-border television - coming from a neighbouring country.
2. Television received direct to the home from satellite. This can be further categorized or sub-divided. There is direct reception by motorized satellite dish or, because of the high cost of these, by means of a less sophisticated fixed dish, which may often be home-made and relatively inexpensive. These are especially to be found in francophone countries such as Mali, Mauritania, Niger and Senegal, but are also seen increasingly in Nigeria, Kenya, Zambia and Angola.
3. Television provided by national terrestrial television stations, both public and private, which relay foreign television programmes received via satellite at certain times.
4. Terrestrially transmitted pay-TV services which broadcast mainly foreign programmes.
5. Cable or MMDS television services, which transmit television channels received via satellite.

There is something of a gulf in sub-Saharan Africa between the number of television stations that are available on satellite and the number of channels that are actually seen by African audiences. In the former case, it was calculated that, in July 2002, around 250 channels were transmitted by some 22 satellites over Africa, of which approximately 100 were in English, 86 French, 30 Arabic, 7 Portuguese, several in major Indian languages and the others in different non-African tongues. Only three were in sub-Saharan African languages - 1 in Amharic and 2 in Afrikaans. We concentrate in this study on those channels that are effectively received by viewers, either directly or indirectly by the above five methods.

Another major characteristic of transnational television in Africa is that, until now, rather little of its content is specifically designed for or created in the continent, another reflection of Africa's poverty. Aside from some South African production that can be seen from some services available from that country, there is at present not very much else on offer that can be described as indigenous. Many of the present transnational television services received in Africa are actually produced for domestic channels in Europe or North America - for example for TF1 or Canal + in France or for the BBC in the UK or NBC in the USA. Others are produced for international audiences in all parts of the world, such as much of the output of CFI, CNN and BBC World.

Although they are beyond the main focus of this study, terrestrial television stations represent the most common form of viewing of transnational

television programmes. Some of the newer private channels broadcast mostly, or even entirely, imported programmes, as can be seen in Kenya with Nation TV. Many such stations have emerged in recent years and the trend can be expected to continue.

Transnational television in francophone Africa is better developed than elsewhere and reaches more audience numbers. For this reason the section on francophone activity will occupy more space here. While the different linguistic regions of Africa operate largely separately, this is not to say that there are no linkages. There is in fact a growing number of connections and further growth can be expected.

Francophone Africa

Television is very unevenly established in sub-Saharan Africa. In francophone countries, there is a very wide gap in some countries between urban and rural areas. There are also some major differences between one country and another in levels of access to and development of the medium. Although it is widely available in the Ivory Coast, in Gabon and in Cameroon, and particularly well developed in the capital cities of Senegal and the two Congos, it is very underdeveloped in the Central African Republic, Chad, Rwanda and Mali. State control is found everywhere. In the whole of francophone Africa, private television services are of significant importance only in the Congo (DRC). In the rest of francophone Africa, there are relatively few private television stations, and those that do exist are mostly the result of links with foreign partners.

The rapid and successful development of the more popular and successful francophone transnational television stations in Africa has resulted from France's own political and cultural approach, which among other things seeks to extend and strengthen co-

operation between countries that have the French language in common. In effect, francophone African countries have joined with France, Canada, Switzerland and Belgium in an international 'community' held together by the French language^{vi}. Interestingly, bilingual Canada appears to be the most active of these countries outside France. The policy of cooperation with state-owned African television services, which France has maintained since independence was gained by its former colonies, has been implemented thanks to good relations with these African states. France has extended its policy of co-operation to include those states that were former Belgian colonies.

Canal France International (CFI) is the outward audiovisual instrument of this aspect of international French policy. When it was set up in May 1989, CFI broadcast encrypted programmes via the Intelsat V satellite solely to African terrestrial television stations, combining the activities of AITV (the International Television Agency) and those of FMI - France Media International. The AITV was set up in 1983 as part of RFO - Radio France Outre-mer - (taking over the transmission of programmes previously sent daily by France's public channel, FR3), whilst FMI had exclusive rights over the export of programmes produced by French public television.

Some earlier ambiguity about this policy was due to another French collaboration with African states which had been devised by Hervé Bourges^{vii} in the context of Canal + Africa at the end of 1987 with the creation of Canal Horizons, the first pay television station aimed at francophone Africa whereby a public company would be set up in every country where this service of encrypted programmes was received via satellite. Canal Horizons (supported by Canal + and SOFIRAD, the French state media enterprise) would be a shareholder in

such a company and would market the channel, the first of which was established in Senegal in December 1991. Furthermore, in 1992, the francophone television station TV5, which was launched in Europe in 1984, created TV5 Afrique, pioneered first by the Quebecois^{viii}, followed by the Belgians and the Swiss, whilst the French only joined in later. At its inception, TV5 Afrique was simply a broadcast of TV5 Europe to Africa.

The domination of the English speaking media at the beginnings of global television through satellite, as well as the dominance of US output in the field of internationally marketed programming, led to a reform of French media policy, as recommended by a report on France's 'international audiovisual policy', requested in 1987 by Jacques Chirac, then French Prime Minister. Developments followed quickly with increasing globalization and the extension of MMDS networks. CFI could now be received directly by the general public either through subscription services or through the terrestrial broadcasting of its programmes by African state television stations. Using the same satellite decoder, subscribers could also receive both TV5 and Canal Horizons in all parts of the continent.

Audio-visual broadcasts in French form one of the cornerstones of France's cultural policy and indeed the general policy of promoting France's interests and language. Alongside CFI (public), Canal+ Horizons (private) and TV5 Afrique (mixed), which is aimed particularly at Sub-Saharan Africa, the interest in developing a French language news channel benefited from the withdrawal of the British channel, ITV, from the Euronews consortium and this has enabled a strengthening of the French presence.

French policy aimed to coordinate its international audiovisual programme more effectively and CFI was extended

into lusophone and anglophone Africa. There was also the emergence of private, fee charging networks. In January 1998 a digital platform was launched for francophone Africa, comprising 8 channels: CFI-TV, TV5, Planète, Canal +, Arte, Euronews, MCM, RTL9. Later it added Canal Horizons and three others.

The main international francophone TV broadcaster is CFI. Since June 2000 one of its subsidiaries manages SAT, Satellite Africa Television, formerly Portinvest, created in 1997 by SOFIRAD, which sold its capital in June 2000 to CFI. Only CFI and TV5 are broadcast direct, whilst a subscription and a decoder are both necessary for the other French language satellite channels. Since April 2002, however, SAT also broadcasts Arte, the Franco-German cultural TV channel, France 2 and France 5 which can be received either by direct satellite reception or by MMDS in Mali, Niger, Senegal, Togo and Burkina Faso.

Since the launch of its first programmes on 17th May 1989, CFI has increased the duration of its programming. From 1995 it has been broadcasting 24 hours a day across 5 continents, especially to 29 television stations in 27 sub-Saharan Africa. The French Ministry for Cooperation has equipped the majority of these stations with the satellite receiving equipment needed.

Nowadays, there are two arms to CFI. The first is CFI Pro which distributes 237 programme hours each month (of which 85 per cent are free) to 46 African television stations in 40 countries, mostly francophone but also some anglophone and lusophone, which are especially interested in receiving sports programmes (which make up 14.7 per cent of programmes broadcast by CFI-Pro). These television stations receiving CFI services are then able to decide whether to retransmit entire programmes or parts of them in their

schedules. CFI has also become accessible direct as a television channel, which can be received in its entirety from satellite, like other French digital programmes, and this is its second arm.

Canal+ Horizons has given rise to two companies in sub-Saharan Africa. Canal Horizons Senegal was set up in 1991 as a joint venture with Canal Horizons holding 15 per cent of the capital, together with the state broadcaster and private investors. Then in Ivory Coast, in December 1992, Canal Horizons won the tender to become a private television station and received its own frequency. The channel is broadcast by SEDACI, which was set up in 1994 by Canal+, together with SOFIRAD, and capital from the Ivory Coast. Madame Boni-Claverie, former director of state broadcaster RTI and minister of communication in the Ivorian government, was its first president. Since April 1995, SEDACI also broadcasts TV5.^{ix}

In May 2002, Canal Horizons launched Canal Satellite Horizons in the Ivory Coast, a digital francophone bouquet of over 20 radio and television channels, which can be received direct via satellite with a 90cm dish. Broadcast from satellite NSS07, the bouquet comprises channels for cinema (Cinecinéma, Action), sport (Pathé sport, Motor TV), youth (Cartoon Network), entertainment (AB1, 13ème Rue, RTL9, Paris Première), music (RFM TV), and general interest (CFI, France 2, TF1, TV5).

TV5 Afrique is one of the beacons of TV5's global network, the francophone channel whose shareholders are France Television (47.38 per cent of shareholding), Arte France (12.5 per cent), SSR, the Swiss public television network (11.1 per cent), RTBF, the Belgian public broadcaster (11.1 per cent), Radio Canada (11.1 per cent), RFO (4 per cent), INA (2.61 per cent) plus three individual shareholders led by

Serge Adda (0.6 per cent). The current managing director is Denise Epote Durand. TV5 is broadcast on satellite NSS7.

We are seeing the beginnings of local television enterprise in francophone Africa, marketing services that are available from transnational sources. One example is Africable Network SA, which was launched in 2001 by cable operators in Bamako, Mali, and grouping together Multicanal (Bamako), Télé Plus (Cameroon), Mediastar (Niger) Linda Communication (Congo), TV Sat (Gabon), Delta 2000 (Senegal), APTV (Madagascar) and Neerwaya (Burkina Faso), with the intention of broadcasting private African television stations by operators of MMDS. The initial project seems to have been slightly altered following negotiations with Portinvest with a view to being broadcast on the francophone SAT, and also with francophone or anglophone public television stations (SABC, AIT of Nigeria, TV3 of Ghana).

There is a network of independent agents responsible for managing subscriptions and providing delivery services by MMDS or making direct satellite access possible in francophone countries as well as in some lusophone and anglophone countries. These companies have a variety of arrangements in place that differ from country to country and between cities and towns in the same country. MMDS services tend to be confined to major population centres while direct satellite services are available more widely. There are many different arrangements in place. For instance, in Senegal, Canal Horizons is distributed in Dakar by 21 distributors using MMDS, direct to home satellite service or by terrestrial transmission. In Rufisque and Thiès, terrestrial transmission is employed. For homes in Saint-Louis, Kaolack, Mbour, Tamba and Ziguinchor direct to home satellite is the main means of delivery.

In the Ivory Coast, Canal Horizons is distributed in nine districts of Abidjan by MMDS, while direct satellite transmission is usual in most other parts of the country. In the second city, Bouaké, MMDS is employed*. In Cameroon, there are satellite distributors in Douala, Yaoundé and Garoua. Distribution is also provided by both direct satellite service and MMDS in Cotonou, Benin, in Bujumbura in Burundi, in Conakry in Guinea, in N'djamena in Chad, in Bangui in the Central African Republic, in Nouakchott in Mauritania, and in Pointe Noire in Congo. Both means of reception are also found in Djibouti, Burkina Faso and Niger. In the Congo (DRC) both alternative services are available in Kinshasa and Lubumbashi. The same circumstances are found in Libreville and Port Gentil in Gabon, in Antananarivo in Madagascar and in Bamako in Mali.

Analysis of the content of francophone transnational services shows a high level of sport, news and cinema. 50 per cent of Canal Horizons' programme output is accounted for by cinema (360 films per year), 25 per cent is sport, the remainder is comprised of music, documentaries and youth programmes. News is one of the genres especially sought by audiences, who look for the latest news and better news coverage (especially on Africa). In many cases, the television viewer expects the channel to overcome the blackout or restrictions imposed on news items broadcast by domestic or national media. TV5, for example, broadcasts a news bulletin every hour. In 2002, 13.3 per cent of CFI-TV's output was in news programmes from TF1 or France 2, as well as 12 minutes of a special daily pan-African news programme *Edition Afrique*. *Afrique Presse* is a 40-minute weekly programme on African current affairs, produced in conjunction with RFI, and *Boulevard du Midi* is a

programme about social issues. In addition to news programmes, 13.4 per cent of output is devoted to magazine programmes and 4.2 per cent to features, adding up to around 30 per cent of the output that can be described as 'factual' content. Besides these two channels, SAT provides news from RTL9 and Euronews. Although not a news programme as such, but reflecting current affairs, *La Semaine des Guignols* (*Puppets' week*), attracts a large audience in African capitals by poking fun at prominent figures in public life, mostly, it has to be said, non-African.

Entertainment programmes, as everywhere, constitute a substantial share of output. We have already noted Canal Horizons' high proportion of films. CFI-TV dedicated 27.5 per cent of its output in 2002 to fiction (films and serials), 4.6 per cent to other entertainment programmes and 21.5 per cent to music. Sport, which represented 6.3 per cent of CFI's content, can be linked both to information and entertainment. Finally 9.2 per cent is made up of programmes for the young. CFI broadcasts very popular programmes that have met with huge success in France, notably variety shows such as *Sébastien c'est Show*, *Le Plus Grand Cabaret du Monde*, and *Stars Parade*. However, this channel also broadcasts African films as well as African music, the programme *Africa Musica* and musical clips such as that of Manu Dibango. There are numerous cultural programmes on CFI, which usually come from western television, such as *Histoire des Religions*, *De l'Actualité de l'Histoire*, *L'Aventure des Planètes*, *Les Géants du Siècle*. Some come from Africa such as *Net d'Afrique*.

Canal Horizons is the most widely available transnational station in francophone countries. This is followed by CFI-TV and TV5 with other stations falling some way behind them. If we use the familiar market research concept of

share, Canal Horizons' share of stations received is 31.5 per cent of households. CFI and TV5 each have a 17.7 per cent share while the remaining 33.1 per cent is made up of all the rest.

We have information from audience research in some areas that tell us about the respective popularity of available television services and programmes. The importance of the role of transnational television stations in Africa is illustrated to some degree by size of the audiences watching the programmes. This can be fairly well evaluated from recent surveys, mainly conducted in urban areas. However, the assessment of the qualitative impact or importance of the broadcasts is likely to be more difficult.

According to audience research, transnational television services have witnessed an increase in their audience in Africa since 1996. This is partly because the number of channels broadcast has increased. But it is also because less expensive means of delivery have been devised, other than the very large satellite dishes that have been required. Free to air broadcasting for a few hours every day of otherwise subscription-based encrypted channels has also contributed to audience growth.

There is more than one way of describing the audience numbers for transnational channels. Those channels that rely on subscription give the numbers who subscribe. Thus Canal Horizons quoted 115,000 subscribers throughout Africa in 1995 and 150,000 at the end of 1999. Describing the situation in 2002 but referring only to sub-Saharan Africa, the figure of 75,000 was given. At the beginning of 2000 the French digital platform had 70,000 subscribers, 50 000 via MMDS and 20,000 by direct reception from satellite.

But the more interesting data are those that tell us about who actually watches and how many there are of

them.^{xi} Ivory Coast provides the best field of research for a study based on individual countries, partly because of the extent of television reception and partly because of the frequency of radio and television audience surveys there.^{xii} Two surveys in Ivory Coast dating from 1995 and 2001 enable us to distinguish certain characteristics and developments. The first, in June 1995, was conducted in Abidjan, Bouaké and San Pedro, whilst the second, from June 2001, concerned covered samples in the same three cities with the addition of Daloa and Korhogo. The tables that follow show the equipment used to access transnational television stations.

For the purposes of this study we have analysed the data by those demographic variables that are significantly correlated with access to the relevant equipment and actual viewing behaviour. These are especially knowledge of French, higher education and social and economic status.

Table 6.1: Percentage of households with direct access to transnational TV channels and video recorders, Abidjan, June 1995

	Satellite dish	MMDS	Subscribers to Canal Horizons	Video recorder
All	2.1	3.8	6.3	21.5
Affluent classes	17.4	24.3	52.7	75.6
Executives	13.3	5.7	22.3	41.8
With good command of French language	4.6	6.3	12.6	30.5
Higher education	21.1	11.9	44.7	59.3
Uneducated	*	1.7	3.8	11.9
Manual Workers	*	4.4	2.2	16.8
Housewives	*	0.6	4.3	15.1
Basic command of French	0.9	2.6	2.6	17.3

*: Nil or negligible

Table 6.2: Consumption of Transnational Television, Abidjan, June 1995 (percentages)

	Any TV		Canal Horizons				TV5		CFI		Any International TV	
	regular	daily	free to air		encrypted		regular	daily	regular	daily	regular	daily
			regular	daily	regular	Daily						
All	92.4	48.4	40.2	9.0	12.7	2.3	14.7	4.0	7.8	1.1	37.9	6.6
Affluent Classes	97.5	75.3	43.3	11.2	60.6	22.1	41.3	15.4	36.8	9.3	60.2	22.3
Executives	91.8	66.9	40.6	7.3	24.6	6.3	28.8	9.1	21.8	6.3	49.3	16.3
With Good Command of French Language	96.9	57.8	52.0	12.9	20.7	5.9	22.3	6.7	17.9	2.4	43.9	11.2
Further Education	99.5	67.1	49.5	12.7	50.1	15.4	43.3	14.5	42.9	12.1	62.5	27.7
No Education	88.7	41.8	33.5	7.4	7.6	0.3	9.0	2.3	2.2	0.0	33.5	2.5
Housewives	89.5	51.4	38.3	13.7	6.1	0.4	9.7	3.4	3.6	0.0	31.1	2.0
Basic French	90.4	42.2	35.2	6.8	8.4	0.2	10.9	2.6	2.6	0.4	34.3	4.3

Note: "Regular" means at least once a week.

The data show that satellite TV access is very much higher among elites. We see a similar pattern when we look at actual viewing behaviour.

It is evident that there are a far greater number of viewers of transnational television than there are owners of the equipment to receive it. This arises from something characteristic of much of sub-Saharan Africa and which assists greatly the spread of TV viewing – the widespread community-based lifestyle and climate that encourages open-air activity. It is easy to watch TV even if you do not have a set. It is also true that direct broadcasting via terrestrial re-broadcasting, which takes place at certain times, will contribute to the high audience levels achieved by some francophone transnational services. In spite of the great differences between social classes and at the very least between the levels of education and knowledge of French, transnational television stations have clearly made inroads even among those with only modest income since 1995.

Six years later, it is the demographic groups that were already the most receptive towards these channels that have improved their access.

Table 6.3: Percentage of households with direct access to transnational TV channels and video recorders, Abidjan, June 2001

	Satellite dish	MMDS	Subscribers to Canal Horizons	Video recorder
All	3.5	6.3	7.0	23.9
Affluent classes	41.7	53.8	73.0	89.3
Executives	22.0	25.1	38.3	55.7
With Good Command of French	45.4	6.3	25.1	45.4
Higher education	37.2	11.9	64.0	82.6
Uneducated	0.5	1.7	2.1	10.4
Manual Workers	0.5	4.4	2.4	18.5
Housewives	0.9	0.6	2.2	13.6
Basic command of French	1.3	2.6	17.1	27

As shown by Table 4, similar rates of growth are found for the actual audiences reached.

Table 6.4: Previous day's consumption of television, Abidjan, June 2001 (percentages)

	Any television	Trans-national TV	CFI	Canal Horizons	TV5
All	85.8	22.7	3.1	16.5	6.4
Affluent classes	92.3	57.6	5.2	37.7	21.6
Executives	94.5	46.4	4.5	26.6	20.8
Good command of French	97.2	37.0	5.2	22.0	15.3
Further education	98.1	60.6	9.4	32.8	24.1
Uneducated	78.1	12.6	2.7	10.8	1.7
Workers, craftsmen	81.6	17.1	6.6	10.3	4.9
Housewives	83.3	15.7	0.8	14.9	0.9
Basic command of French	81.8	16.5	3.1	12.8	4.3

Surveys in the Ivory Coast show that audiences for all television are very much lower in rural areas. Audiences for transnational television are very low outside the major towns. Even in towns outside Abidjan, audiences are smaller and this is linked to much lower levels of access to the necessary household equipment and generally lower levels of subscription to paid-for services. For example, in Bouaké, only 3.3 per cent subscribed to Canal Horizons while the figure in San Pedro was 4.6 per cent. Satellite dish ownership in Bouaké was only 1.9 per cent of households and 3.2

per cent in San Pedro. In Bouaké, only 2.9 per cent of households were connected to MMDS. Access to any transnational TV service was even lower in the other Ivorian towns surveyed.

International television stations' status as a leading source of news and information endows them with a prominent position. The survey in Abidjan in June 1995 that we have already quoted puts international television stations in sixth place for information on international news, but in second place (after international radio stations) for affluent classes and for those who have higher education, and in third place for executives and employees. International TV reaches second place for information on science and technology and even first place among affluent classes and graduates.

In June 2001 in Abidjan, international television stations ranked in third place as the best source of information about events abroad but in second place (again after international radio stations) for the well-educated, employees and executives, affluent people and even in second place (as ever after international radio stations) for executives, employees and the well off, as a leading source of information about an event in the Ivory Coast.

International television stations are also received by a significant number of people in Senegal where a local office for Canal Horizons has been set up, and where there also exists a dynamic MMDS network, particularly in Dakar but also in provincial towns. A survey conducted by SOFRES in February 2001 stated that 34.1 per cent of those surveyed subscribed to MMDS, 20.2 per cent to Canal Horizons and that 1.5 per cent had a satellite dish in Dakar-Pikine. However, the actual number of television viewers is well above that, as the following table shows.^{xiii}

Table 6.5: Previous day's shares of audiences to transnational TV channels, Dakar-Pikine, Senegal, February 2001 (percentages)

	International TV stations	Canal+ Horizons	CFI	TV5
All	44.2	31.1	15.4	16.0
15-24 years	58.3	43.0	18.9	21.4
Students	69.8	53.6	24.6	25.5
Secondary and higher education	64.4	46.7	24.0	24.9
Employees, Executives	63.3	36.2	33.8	27.0
Manual Workers	28.7	17.2	9.4	11.5
Affluent classes	73.2	49.8	31.3	32.9
Poorer classes	27.0	21.0	6.8	7.6
Uneducated	23.2	16.6	6.0	5.9

We have retained those categories of people in Table 5 who were most likely to watch transnational television stations and those who watched it the least. It is interesting to note that, even among the latter, ratings are not insignificant. Among other channels in the French digital SAT package, not listed in this table, MCM Africa had a 6 per cent audience on the previous day, while RTL9 had 5 per cent. International television stations ranked in third place in Dakar and Pikine, Senegal, among the leading sources of information about a news event abroad, behind national and international radio stations. For members of the affluent classes, international television came second, just after international radio stations.

In other capital cities in francophone Africa audiences for transnational television can also be high. Figures from Ouagadougou in Burkina Faso show that 16.1 per cent of a representative sample subscribed to MMDS (90.3 per cent of the affluent and

52.4 per cent of the better educated), 2.9 per cent subscribed to Canal Horizons (39.6 per cent of the better off). Just 0.9 per cent of the sample owned a satellite dish but 35.6 per cent had watched international television stations over the week preceding the survey and 15.6 per cent the night before. Canal+ Horizons had been watched by 11.5 per cent during the same week (by 35.3 per cent of executives), TV5 by 29 per cent and CFI by 15 per cent.^{xiv}

In Cameroon, foreign television stations benefit from the fact that the national television network CRTV does not fulfil the expectations of its audience. The digital package offered by SAT is watched by 58.5 per cent of the viewers of Yaoundé, at any time. The most popular channels are Euronews (34.7 per cent), RTL9 (31.5 per cent), Canal+ Horizons (29.7 per cent), followed by CFI and then TV5.^{xv}

The influence of transnational television stations can be measured according to the greater or lesser number of viewers who watch them and also by the length of time that is spent watching them. These television stations meet a need for information that is not supplied at present by the national public television services, especially in times of crisis. This is particularly noticeable for the better educated and executives who are also the main listeners to international radio stations.

The influence of transnational television stations in francophone cities is all the greater since national television stations fail to meet the expectations of viewers because of their inadequate local output. This is very evident in the two major cities of Cameroon where television, commonly transmitted either by cable or by MMDS, enables a sizeable audience to access RTL9 whose programme *Ca va se savoir*, (*It will be found out*), exposes personal and private disagreements on air. The

following table illustrates RTL9's weekly audience.^{xvi}

Table 6.6: RTL9's audience in Cameroon, December 2001 (percentages)

	Douala	Yaoundé
All	57.3	56.9
15-24 years	66.9	65.6
Employees, Executives	70.9	64.3
Manual Workers	57	47
Pupils, Students	69.3	76.5
Housewives	55.9	49.4
Uneducated	41.4	39.9

Transnational television channels are received less in those countries where television itself is less widespread. However, the gap widens between the capital and the remainder of the country, between the leading classes and the well educated and the rest in every country. In 2000 at Niamey in Niger, only 5 per cent of adults were connected either by satellite or by cable, despite the fact that in the course of the week preceding the survey, 17 per cent had watched TV5 and 10 per cent CFI.^{xvii}

As far as Chad is concerned, there is only a survey dating from 1993 by ASA, at which time CFI reached 2.4 per cent of a sample of the population in the capital N'djamena; TV5, 2.1 per cent and CNN 1 per cent. Yet, 59 per cent watched neighbouring Cameroon's television, an interesting example of cross-border television, where a foreign channel got more viewers than the national television, which did not even broadcast every day.

Transnational television channels will have an increasingly important role to play in francophone Africa, which has already been greater than elsewhere on the continent. Programmes from foreign broadcasters account for an important part of the schedules of many national public television channels and account for an even greater part of the schedules

of the emerging private television stations. They widen the gulf that separates city dwellers from rural inhabitants and the poorest from the wealthiest, all the more according to the level of education and of French language. Transnational television channels, however, whether received by satellite or by the intermediary of an MMDS or cable operator are on the increase amongst the public of large francophone cities, especially among the ruling classes and the young. This undoubted influence can be expected to increase in the years ahead, not the least because throughout francophone Africa national broadcasters are hampered by financial problems and government control that limit their creativity.

Lusophone Africa

Portuguese-speaking countries have also developed a network of transnational television stations, a development led to a large extent by channels based in Portugal and Brazil. There is the Portuguese international TV station, RTP^{xviii}, as well Lusovisao which, in a similar way to TV5, has since July 1999 been distributing the output of Portuguese television stations and that of the five Portuguese speaking African countries. MGM Latin America provides some of its service from Brazilian sources and the Brazilian giant TV Globo International is also available from satellite. There is now also a children's service known as the Panda Channel originally targeted at children between 4 and 14 years in Portugal but now on satellite for lusophone Africa.

RTPi is probably the most important of these. It signed agreements in 1994 and 1995 with all five lusophone countries. In January 1998 it launched a special Africa service RTP Africa, which is available as a free to air terrestrial service in Angola. Lusovisao

was created on a trial basis, to establish the exchange of programmes between Portugal and the five lusophone countries in Africa. The Portuguese group Visabeira whose activities, in addition to radio and television, also extend to industry, tourism and property, joined forces with telecommunications providers in Mozambique to introduce TV Cabo in Maputo and later in Beira and in Nampula. TV Cabo broadcasts CNN, Cartoon Network, Skynews, RTPI, RTP Africa and also other channels for sport, cinema and news.

South Africa's Multichoice, which we describe in some detail in the next section, has also moved into lusophone countries. Multichoice Angola was launched in 1998, first being confined to Luanda but now also accessible in Cabinda, Lobito and Namibia. In 2002 it registered 20 000 subscribers, especially those who wished to view TV Globo.

Direct access to satellite services in lusophone Africa might not be widespread but has shown rapid growth in some places. For example, in Mozambique in 1995, only 1 per cent of homes in Maputo and 3 per cent in Beira had cable or satellite television. By 2001, 5 per cent of homes had access to satellite television, 8 per cent in Maputo, 6 per cent in Chimoio, 3 per cent in Beira and 1 per cent in Nampula.^{xix} For the most part, direct-to-home satellite services reach only the wealthiest sections of the public in Portuguese-speaking countries. Many more are reached, as in the rest of Africa, through rebroadcasting on terrestrial services.

The development of television has been rapid in the main cities of lusophone countries. For example in Mozambique, between 1995 and 2001, the number of daily television viewers climbed from 60 per cent to 74 per cent in Maputo and from 46 per cent to 60 per cent in Beira. Over the same period, weekly viewing (otherwise called

television's weekly reach) had increased from 74 per cent to 91 per cent in Maputo and from 51 per cent to 75 per cent in Beira.^{xx}

The cable service TV Cabo reckons that it will be available in 15,000 homes in Maputo in a few years. In Luanda, the capital of Angola, in 1996, 3 per cent of homes had access to satellite television, but RTP Africa was also received via cable. The state TV station, TPA, broadcast a schedule in which 60 per cent was imported programmes, particularly from CNN, CFI and RTPI. In Luanda as a whole, 67 per cent of households received television, and these statistics for access remind us that here, as in many other countries in Africa, most audiences see the content of transnational television through the mainstream terrestrial services, rather than from satellite direct or cable and MMDS.^{xxi}

Anglophone Africa

The two major English language players in transnational television in anglophone Africa are both South African. They are MultiChoice Africa and TV Africa, while a number of content providers, most of them from outside Africa, utilize these broadcast-publishers to get their services to viewers on the continent. Other satellite services are beginning to emerge.

MultiChoice is the pre-eminent content carrier in anglophone Africa. The parent company, MultiChoice Holdings Investments Limited (MIH), operates subscription services across the whole of Africa, as well as the Middle East, Greece and Thailand. It emerged from Mnet, South Africa's first private television channel. Historically, Mnet was only a terrestrial channel and was available only in South Africa. It began broadcasting in 1986, breaking several decades of SABC's broadcasting

monopoly. Initially it was a joint venture of four newspaper publishers: Nationale Pers (Naspers) owned the greatest share, while Republican Press, Allied Publishing, and Times Media Limited held equal shares. In 1998, Naspers acquired control over MIH from the other press groups. Its subsidiaries included MultiChoice (which was simply a distributor platform and subscription management service), MNet, the content provider and scheduler for analogue terrestrial subscription television in South Africa, and M-Web, the Internet portal. The following year MIH Limited celebrated its initial public offering on the Nasdaq and Amsterdam stock exchanges. In 2002 the cycle was completed, with the whole conglomerate of MIH Limited and MIH Holdings becoming wholly owned subsidiaries of Naspers. Naspers restructured itself as a holding company with five subsidiaries: MultiChoice Investment Holdings (MultiChoice and M-Net); M-Web (internet portal); Media24 (print newspaper titles and online news service); Nasboek (book publishing and retailing) and Educor (private colleges and business schools). In this way, the Naspers/MultiChoice stable is an outstanding example of cross-media ownership and control, making full use of the synergies and cost-efficiencies of such an arrangement, while at the same time fully exposed to some of the pitfalls of over-enthusiastic expansion.

An analogue service, distributed via satellite, was launched to more than 20 African countries in 1992. Its subscriber management division became so successful that the company was able to build on it, hiving it off from the rest of the business, and renaming it MultiChoice Limited (MCL) in 1993. Both MCL and MNet traded on the Johannesburg Stock Exchange as linked units until 1995. The first transnational joint venture was entered into with Namibia in 1993. Digital satellite

services were offered across Africa in 1995, utilizing the C-band on PAS4 satellite. With the delivery via satellite, the bouquet of channels was enlarged significantly. This was the beginning of DSTV (Direct Satellite Television), a subsidiary of MultiChoice. At this point, MNet and MultiChoice were formally separated, with the latter changing its name to MultiChoice Investment Holdings (MIH). During the next few years, MultiChoice expanded beyond Africa: into Greece in 1995, Thailand two years later and China in 1999. That year, the transmission moved to PAS7 satellite and in 2000 the launch of the Eutelsat W4 satellite opened up the Ku-band services to sub-Saharan African and the Indian Ocean Islands. Asia was the next stepping-stone, and 2001 saw the acquisition of 46.5 per cent of QQ (China), a satellite television service on the China mainland, and also the launch of Indian and Portuguese bouquets. Thus within a single decade, MultiChoice expanded horizontally, moving from being a terrestrial pay-television platform in a single country, to a multi-platform provider across the African continent.

At the time of writing, MIH Limited owns operations that span over 50 countries, providing entertainment, interactive and e-commerce services. The group employs over 6,000 collaborators, 690 of whom are based in their Randburg headquarters in South Africa. The group claims over two million paid-up subscribers in Africa, the Mediterranean and Asia, 1.25 million of whom are in Africa. 57 per cent of African customers subscribe to the digital platform (DSTV): 638,000 households in South Africa and a further 200,000 in the remainder of sub-Saharan Africa, while approximately 632,000 subscribers remain on the analogue services. [

Critics point out that with an annual monthly subscription of US\$60,

the reception of these services is limited to foreign nationals and the local elite, and thus do not contribute to the enrichment of the local states, either culturally or economically. Prices are very much higher for this service than for the francophone transnationals outlined earlier and this has meant that audiences and access to transnational television have so far been much lower.

In a show of optimism that characterised media industries worldwide at the turn of the millennium, MultiChoice diversified further, investing in the interactive television operating system, Open TV, in 1997. This venture proved to be untenable and, in 2002, MultiChoice's shares in Open TV were sold to an American company, Liberty Broadband Interactive Television, a subsidiary of Liberty Media, for US\$17 million.

The Multi-Choice group is able to leverage its business into four areas: content aggregation, subscriber management, platform development and marketing and branding. Within Africa, MultiChoice Africa operates under three different business models, together with a programming and technology support

sector. Under the joint venture model, MIH undertakes a partnership with local entrepreneurs or state broadcasters, in which each party has a partial shareholding and a joint management strategy. Joint ventures trade under the name of MultiChoice and the country, e.g. MultiChoice Zambia, and have full access to MultiChoice Africa's nerve centre in Randburg through satellite communication, allowing for technology transfer and fully staffed customer-service support. Franchises carry a MultiChoice identity, while the parent company provides management, infrastructure, training and marketing support. As with joint ventures, they are facilitated through a fully online connection to the central computer system. Independent agents comprise a network of entrepreneurial agents who sign up subscribers and install DSTV. These companies trade under their own business names, while also promoting the MultiChoice Africa brand. A table of the countries in which MultiChoice Africa operates, arranged by business model, is provided in Table 6.7.

Table 6.7: MultiChoice Business Models by country

Joint ventures	Franchises	Independent agents
Botswana	Angola	Benin
Ghana	Ethiopia	Burundi
Kenya	Malawi	Cameroon
Namibia	Mozambique	Comoros
Nigeria	Swaziland	Congo (Brazzaville)
Tanzania (mainland)	Zimbabwe	Congo (DRC)
Zambia		Equatorial Guinea
		Eritrea
		Gabon
		Gambia
		Ivory Coast
		Madagascar
		Mali
		Mauritius
		Niger
		Rwanda
		Sao Tome and Principe
		Senegal
		Sierra Leone
		Tanzania (Zanzibar)
		Togo

MultiChoice Africa is a broadcast-publisher and subscription manager. In its former guise, MCA packages channels, some fully imported from America, Europe or Asia, others compiled from imported programming together with locally commissioned programming through its sister company, MNet, and broadcasts these as channel 'bouquets' to subscribing clients. These clients are served with programme guides, both printed in magazine form as well as electronically available on-screen. As a subscription manager, the company administers contracts with, and receives payment from subscribers; operates a call centre for subscriber service; and co-ordinates the supply and servicing of decoders to subscribers.

As a subscription business, all the MultiChoice television programming is encrypted. The system in use is the Iredeto System, for which they have the agency in Africa (and large parts of Mediterranean Europe). Encryption implies the scrambling or encoding of the signal, which is then decoded at the point of delivery through a television-top decoder. Clients not in good financial standing are simply 'cut off' – i.e. the ability to decode the signal is discontinued. MultiChoice operates two distinct systems of distribution – encrypted terrestrial broadcasting and encrypted broadcasting via satellite. The latter is available on both the analogue and digital platforms, although strong moves are being made to 'migrate' all subscribers onto the digital platform.

Multi-Choice operates three satellites over Africa: PAS 7 for Ku band coverage of southern Africa, PAS 10 for C band coverage of sub-Saharan Africa; and Eutelsat W4 for spot beam coverage of Nigeria and broadband coverage of the rest of Africa. Further capacity of Ku band services was recently rolled out on the back of the Eutelsat W4 at a cost of US\$10 million. The Ku band operates at

a much higher frequency than the older C-band, and has a much smaller footprint with more power. This means that it covers a smaller area across the continent, requiring a greater number of transponders. However, the advantage of the Ku band is that it requires far smaller (and less expensive) satellite dishes than other bands, allowing for a greater consumer uptake of satellite technology. The Ku band also allows for greater reach and penetration of coverage across the continent and greater bandwidth (i.e. the amount of data a transponder can carry), making possible parallel channels for language dubbing in additional languages.

One of the advantages of digitalization is the opportunity to amortize the content over a number of different content delivery platforms, notably the Internet. As part of the MultiChoice Investment Holdings Ltd Group, the content acquired by MNet and DSTV is used to cross-promote the African M-Web Internet operation. Interactive television is in its infancy, exemplified mainly through the electronic programme guides; however, some territories do have access to embryonic services in e-mail, gaming and home shopping, all of which promise to be a major part of future development.

Growth in the Satellite television market will be determined most directly by the expansion of a middle class consumer able and willing to afford the subscription fees for the service. Beyond this, three other factors will play a role:

- The increase in bandwidth capacity, which will allow the delivery of high speed, bulk data on a point-to-point basis, while at the same time, facilitate a drop in the cost of transmission services.
- The growth of interactive applications, such as email using the television/ satellite connection,

which will encourage a diversification of the services on offer to consumers, adding value and creating greater demand.

- The ability to store content on decoders through Home Media Service without the intermediary use of a VCR, thus fundamentally changing the way in which consumers interact with television viewing. MNet, through the terrestrial broadcaster MNet, has three wholly owned, 'proprietary' brands: K-TV for children's programming, Super Sport for sports coverage and Movie Magic for movies. Each of these channels is made up of both commissioned local programming together with programming produced elsewhere and dubbed or subtitled into the local language. The Movie Magic service acquires exclusive pay-TV rights to premier movies, notably from the Disney, Columbia Tristar/Sony, Warner Brothers, Fox, MCA/Universal, Paramount, MGM and Dreamworks Studios.^{xxiii}

All three of these services or brands play out on the terrestrial service available in South Africa, MNet, which is a broad-spectrum entertainment channel, supplemented by specialist Super Sport channel. Further channels provided by MNet include the partially-interactive reality TV show, *Big Brother*, which in 2003 was produced as *Big Brother Africa*, with an all African cast, living together in a game house until all but one is eliminated.

The analogue and digital services available via satellite are delivered as DSTV, a direct-to-home service, and provide various 'bouquets' of channels. In addition to those already mentioned, fully-imported channels such as Discovery, National Geographic, Hallmark, BBC Prime and Cartoon Network are also included. Twenty-four-hour news channels – BBC World, CNN International, Sky News and China

News – provide a mainstay of programming. Some of the channels are of international standards, while others are created by their sellers for specific world regions. BBC Prime, for instance, is a 24-hour entertainment channel offering a selection of the best British domestic programming emanating from the BBC. The line-up of programming is decided by the BBC, and sold as a package, tailored for different regions of the world, thus obviating the necessity for the carrying satellite service to apply for individual programme rights. CNN too has an international edition tailored for Africa. Foreign language programming in French (including Canal+ and TV5), Italian and German is available as a standard part of the bouquet, while specialist bouquets, provided for an additional fee, for Indian, Portuguese and Arabic viewers are also available.

The only available detailed audience data for MultiChoice services by satellite applies only to the South African portion of the viewership. They confirm that viewers are mostly to be found among the high-income earners, government officials and expatriates.

Another prominent channel is SABC Africa, the external service of the South African Broadcasting Corporation, South Africa's state-owned broadcasting body. The channel was created by an amalgamation of two previously separate channels. Its namesake, SABC Africa, was a news, current affairs and documentary channel beamed at the rest of the continent, while Africa-2-Africa, an all-entertainment channel, was launched in September 2000, in order to provide a satellite channel broadcasting entertainment made in Africa, for Africa. On April 1st 2003 a hybrid channel was launched, drawing programming from both sources. The channel is housed on the DSTV platform operated by MultiChoice, reaching 49 countries (see list for MultiChoice). The

channel also serves as an overnight feed on SABC2, one of the three domestic SABC terrestrial channels. In terms of content, the channel has a dual content strategy – to provide news and current affairs, as well as entertainment programming. Most of the weekly programming is based on the news/current affairs format, while weekends are predominantly entertainment. The stated philosophy is to 'celebrate the positive side of Africa and being African'. Some programming, approximately a quarter of the airtime, particularly lifestyle, news and current affairs programmes, are especially commissioned for the channel, while a special effort is made to source African movies. Two African-produced dramas are broadcast every week, representing countries such as Tunisia, Egypt, Burkina Faso, Zimbabwe, Guinea Bissau, Cameroon and Ethiopia. For the most part, however, the programmes are rebroadcasts of material shown on the terrestrial channels in South Africa. The majority of programming is broadcast in English, with considerable sub-titling in African languages, French and Portuguese.

Detailed audience data for SABC Africa is available only for South African viewership.^{xxiii} The audience profile is predominantly male and predominantly middle-aged. The channel attracts the top two socio-economic groups on the Living Standards Measurement index, i.e. those with over \$US2,500 per household per month.

TV Africa started broadcasting from South Africa in July 1998. Founded by Barry Lambert and David Kelly and financed by Zephyr Management, the Africa Investment Fund and the South Africa Enterprise Development Fund, it draws its revenue from advertising rather than subscription. At the time of writing, its network provides satellite services to 34 African television channels based in 24 countries,

including Ethiopia, Tanzania, Lesotho, Swaziland, Zambia, Nigeria and the key francophone territories. TV Africa, broadcasts between 3 and 18 hours of sports and entertainment programmes every day. These are received mostly by commercial television stations. Most of TV Africa's programmes are in English, but it is also providing some French language content to partners in Benin, Burundi, Gabon, Niger and Togo. Charles Zougoua, TV Africa's Director for West Africa, has described the network's mission as being 'to bring Africans sport and entertainment programmes'.^{xxiv} TV Africa is able to sell time to advertisers within a programme package that is delivered via terrestrial stations to audiences in several countries. This is a formula that is also being used by another satellite TV service supplies, African Broadcast Network, as we outline later.

Much of the programming of TV Africa is similar to that provided by MultiChoice/DSTV, with the latter having the rights to encrypted broadcasting while TV Africa holds territory rights to the free-to-air transmissions. African-produced programming on TV Africa emanates mostly from Nigeria and Ghana, although these programmes are in short supply. The local affiliates, spread in the 24 countries throughout Africa, produce the news programmes where these are available. The estimated reach of TV Africa through its affiliates is 62.1 million.^{xxv}

TV Africa seeks to make use of existing terrestrial broadcasters to reach audiences and to sell access to those audiences to media buyers – advertisers of consumer goods and services targeting African consumers. TV takes a relatively low share (about 20 per cent) of sub-Saharan's advertising expenditure. This will grow but the total cake is not large and television's share is not likely to reach the levels found elsewhere of 40

per cent and more. TV Africa's growth is likely to be slow. Audiences to terrestrial stations are also of less interest to some of the higher spending advertisers who are more interested in the wealthier audiences reached by satellite and cable services.

A third African satellite television service has recognised this problem and is seeking other ways of obtaining funding. The African Broadcast Network's aim is to reach mass audiences through partnerships and deals with Africa's mostly state-owned TV stations. It began broadcasting in January 2001; it is a UK-registered company whose satellite service is based in Johannesburg. Like TV Africa, the idea is to provide a continent-wide programme stream to terrestrial TV stations. While most of TV Africa's affiliates are private stations, ABN seeks to serve the larger state-owned stations, which also reach the largest audiences at present and remain the dominant force in most markets. Like TV Africa, ABN offers access to TV audiences in several countries as a media package to advertisers. ABN does its sales through a large and influential British media sales company.

ABN's programme offer began with a chiefly US mix of popular drama series, soaps, comedy and sport. It plans to introduce more African programming as the system succeeds and grows. It has also been able to offer the Africa Cup of Nations football. The company owns the African Barter Company whose ability to create deals involving exchanges rather than the use of scarce hard cash has made the proposition more viable.

The ability to offer audiences in several African countries to advertisers in single deals is a major strength of both TV Africa and ABN. But ABN believes that the future of the venture depends on other forms of funding. Its chief executive, George Twumasi,

recognises that many members of African TV stations' audiences, being financially very weak, are of little or no interest to commercial advertisers. But, he points out, they are of great interest to those organizations committed to improving Africa's health, education, systems of government and general development. ABN has therefore created a not-for-profit sister organisation, the African Public Broadcasting Foundation. This will have two objectives. The first is to 'kick start the production of a greatly increased volume of indigenous programmes in entertainment, education and information'.^{xxvi} This leads to the next objective, although it would be better described as a means to the end of the first objective. This is to seek aid from development agencies, both government and non-government organizations, who see the benefit for the African poor in developing better television services. Twumasi believes that without this kind of non-commercial assistance it is unlikely that there will ever be enough cash resources to bring African television 'to the level where it can match services elsewhere in the world'.^{xxvii} There are already many expressions of interest and support, especially to provide television services through satellite delivery that have a purpose beyond entertainment and which will serve Africa's urgent need for poverty alleviation and development. ABN has made an impressive start. It provides a daily satellite service of between one and two hours at prime time, and services are carried in the daily schedules of terrestrial stations in ten countries.

Conclusion

Sub-Saharan Africa's TV market is financially the weakest in the world. It is also thus far weak also in terms of indigenous content. This situation is unlikely to change with any speed or in

the immediate future. What will change in the field of transnational television services by satellite will be the successes and failures of the different approaches that we have outlined. We have seen the dominance of European and South African initiatives in which the rest of Africa south of the Sahara has played relatively little part, at least so far as production is concerned. There is huge potential for the future, but television is an expensive medium and the risks of failure are high. A major problem in writing this chapter is in making any predictions for what will succeed.

Transnational television stations play a role in sub-Saharan Africa that varies greatly from a country to another. There has been more activity in francophone countries than elsewhere, although this imbalance now seems to be changing. In many countries it already forms a major part of the television landscape and especially in the television consumption habits of the upper classes and of young urban people transnational television activity throughout the continent can be expected to continue to grow while the public service broadcasters continue to be weakened by a lack of adequate resources to meet audience needs and demands. ABN, TV Africa and some of the francophone and lusophone enterprises may be able to break through this by bringing a greater pan-African element and especially in ABN's case, if it is successful, by the pooling of resources for more and better indigenous production.

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There are two potential developments. The first is linked to the

hypothetical development of a pan-African satellite channel. At this stage only South Africa (MultiChoice) and possibly ABN seem to be in a position to make this happen. The second relates to the development of a partnership between African and Western television stations, which would allow the former to express themselves whilst using the logistics and technical know-how of the latter. Nevertheless the freedom of expression of African television stations is hindered by conservative attitudes of African governments, which continue to control most television production and transmission on the continent.

Notes

ⁱ Accurate and reliable statistics for Africa are hard to find. The BBC's international research department estimated in 1999 that there were 29 million TV sets in sub-Saharan Africa, about one for every twenty people. This compares to Asia and North Africa where there is one set for every six people. See Graham Mytton, 'From Saucepan to Dish', in Richard Fardon and Graham Furniss (eds), *African Broadcast Cultures* (Oxford, James Currey, 2000). As far as TV transmitting facilities are concerned, there are several African countries with only one terrestrial domestic broadcaster. In many countries, satisfactory reception can only be obtained in and around the major urban areas. See *World Radio TV Handbook*, (Oxford, WRTH Publications, annual).

ⁱⁱ Of the 48 countries south of the Sahara, 19 can be classified as francophone, and 17 as anglophone. Additionally three countries can be classified in both camps. Five lusophone countries, one Spanish speaking and three that do not fall into any of these categories make up the remainder.

^v Personal correspondence. Lynn Mansfield, SABC GM Strategic Planning, Radio. 16 May 2003.

^{vi} André-Jean Tudesq, *l'Afrique noire et ses télévisions* (Paris: Anthropos-Ina, 1992), and André-Jean Tudesq and George Wedell, *Television and Democracy in Africa*, Report for the EEC (DG8), September 1996.

^{vii} MMDS is sometimes described as a cable service without cables. It uses a high frequency transmission system to carry several TV services in a package similar to what one might have from a cable service that can be received in any household subscribing to the service and with the specialised receiving equipment necessary.

^{viii} Perhaps the best known outcome of this co-operation is TV5, referred to later, a global TV service that seeks to reflect the cultural product of this grouping of francophone countries.

^{ix} Hervé Bourges, a friend of socialist President Mitterand, was initially appointed to head the French state's international radio service, Radio France International. He later moved on to other government-appointed posts in the media before going to SOFIRAD.

^x The francophone Canadian province.

^{xi} This and other pieces of information about the situation in the Ivory Coast refer to the situation before the outbreak of fighting between government and rebel forces in late 2002. Many aspects of the television landscape were changed by this conflict and the long-term situation remains unclear.

^{xii} See previous footnote.

^{xiii} For access to much contemporary audience data we are grateful to Jean-Marc Belchi, Head of the Research Department at CFI, to Daniel Nobi, Director of the Research Department at RFI, both in Paris, and Marie Dziedzic at the research archive of the BBC World Service in London.

^{xiv} The various tables for Ivory Coast have been provided by Etudes Médias of HPCI, Hilmar Peter Consultants International.

^{xv} Sofrès *Etude sur les moyens d'information du Sénégal*. Dakar-Pikine, February 2001. 1137 interviews of adults (15+).

^{xvi} Immar *Etudes médias* (Kinshasa, December 2001).

^{xvii} Ibid.

^{xviii} Ibid.

^{xix} Immar *Etude des moyens d'information Niamey*. Other surveys found similar low levels of household access to satellite TV. There were only 0.5 per cent of the sample possessing a satellite dish in a survey completed in February 2000 in the three principal towns of Madagascar. In a survey in Cotonou, Bénin, only 1.5 per cent had a satellite dish although 12.3 per cent had access to MMDS.

^{xx} RadioTelevisão Portuguesa Internacional is more or less the Portuguese equivalent of CFI. It carries some commercial advertising but it is a state enterprise.

^{xxi} BBC World Service, *Media Survey*, Mozambique, 2001.

^{xxii} Ibid.

^{xxiii} BBC World Service, *Media Survey*, Angola, 1996.

^{xxiv} Some of these films and programmes are available on terrestrial channels in the various territories.

^{xxv} SAARF TV audience data 2003.

^{xxvi} Quoted in the Ivorian daily newspaper *Le Patriote*, 8 June 2000.

^{xxvii} Estimate provided by the broadcaster.

^{xxviii} George Twumasi, 'Television: Africa's future media opportunity', *The Channel*, Jan-March 2003, p.20.

^{xxix} Ibid.