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Conference Media Report



Reports by contributed to by John Wanjora and Gitahi Njeri
Compiled & Edited by Wheels Media

This report is not be a comprehensive summary of all presentations by speakers and panelists and is compilation of a number of journalists report at the Broadcast Film and Music Africa Conference 2012.

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A report of select sessions from AITEC Africa's 4th Broadcast, Film & Music Conference

CONTENT DISTRIBUTION: ALTERNATIVE BUSINESS MODELS

The devil is in the distribution: setting the content free

Jason Njoku, Iroko TV, Nigeria

Iroko TV is an online portal for Nigerian and Ghanaian movies. The company distributes Nigerian and Ghanaian movies through the internet. This decision to launch the platform was informed by statistics that showed that internet penetration was growing rapidly in Africa and the equally the demand for Nigerian and Ghanaian movies.

In terms of statistics that came out of a study commissioned by the company, Nigerian movies had a wide viewership across the wide competing effectively with both Hollywood and Bollywood. For example, the study found that Nollywood movies had the biggest market share in Kenya at 42 percent. In Nigerian, Nollywood accounts for 62 percent of the market share.

On average, Nigeria produces 2000 movies a year or an average of 40 movies per week with annual revenue average of US\$590 million. But the industry could earn more with effective distribution channels. Currently 50 percent of the Nollywood movies in the market are pirated robbing the industry a substantial revenue base.

Iroko therefore is a way of checking the impact of piracy on the industry as well as ensuring that producers and artists earn revenue for their production. The company buys the movies from the producers and uploads it online in three systems. The company started off by buying rights and uploading the movies on Youtube. In return, Youtube would share revenue generated from advertising with the company.

As the viewership has grown the company has set up its own website where they update the movies for free viewing. As in the youtube strategy, the plan is to drive viewership and offer the viewership to advertisers in America, Europe and Asia. This is because these three continents have substantial populations of Africans, especially Nigerian in Diaspora.

Lately, the company has started a subscription channel where people will pay to view the latest releases from both Nigeria and Ghana.

The company recently got US\$ 8 million funding from an American Private Equity fund for its growth.



The Exhibition area abuzz with film makers and broadcasters exploring new innovations at BFMA conference

Audiovisual content sourcing and distribution: a distributor's perspective

Manu Savani, founder of Gala Global, USA

Savani has distributed movies and videos since 1966. A long the way, he has learnt valuable lessons. The most important is that different markets have different tastes. For example, when he acquired the rights for blockbuster "My Fat Greek Wife" he had expected that it would be a major hit in East Africa. However, the sales were very disappointing as he posted losses on that deal. He has also learnt that there some theme types that work. For example, religion, love and tragedy always have good sales. Among some of his best performing movies were Ten Commandments, and Titanic. There are also contents that will sell depending on their proximity to the audience. One such a hit iijn East was a movie on Idi Amin "Raid on Entebbe."

The key role of content distribution in the development of the broadcast industry

George Kimani, Business Development Director, Continental Content Distribution, Kenya

The speaker discounted the old mantra in broadcast that “Content is King,” saying that some broadcasters may have great content but have little or no revenue. Most broadcasters have been copying each other in broadcasting Mexican soaps. This is because they have not understood their audiences.

To avoid this duplication and also to turn viewership into money, broadcasters must understand their audiences. This will help them to acquire content that suits their needs. At the same time content developers should know that there is content that broadcasters will not touch while there is content that all broadcasters will scramble for.

One such content is format programs such Idol, Project Fame. One of the best success stories of format content is “Who is Smarter Now?” which used to run on KTN in Kenya. The program was a good performer in the sense that it was rated highly in viewership surveys. As a result, the program had sponsorship from the beginning to the end.

Broadcasters and content developers alike must have a paradigm shift in order to make money. They must understand that connection with audience, not content, is king. To do so, broadcasters must position themselves properly in the market. They need to understand viewers needs through research to find out their tastes. This will also help them schedule their programs in line with the preferences of the audience.

They will also need to distinguish between content that attracts viewership and content that builds loyalty. Some programs like “cheaters” may be good in attracting viewership but they might not be helpful in building loyalty. Further, the broadcasters must distinguish between content that is entertaining and content that attracts revenue. Formats are some of the contents that can build a broadcasters revenue.

Lastly, broadcasters must begin spending to market themselves. Most broadcasters in Africa do not market themselves and those that do so, do not a good job at it. There is need for the broadcasters to know that they are brands and if they do not promote the brands then they will not attract revenue.



Speakers and delegates at the BFMA take a break from a rigorous learning and sharing programme for a photo moment

DISTRIBUTION: SPECIALIST CHANNELS

Distribution of African content in new market

Justin Atkinson, CEO, Aya Distribution, UK

Atkinson took the participants through the experience of the company in distribution of African motion pictures in Europe, America, Africa and Canada using the example of her company Aya Distribution. Her involvement with African movies begun when she worked with Save the Children Nigeria. Save the children is an international charity organisation to safe guard children rights. Her moving into Nigeria coincided with the explosion of the Nollywood movie industries.

People across Nigeria and the entire Anglophone West Africa were all scrambling for the productions even though the outside world thought the movies were not up to standard.

Save the Children therefore decided to contract Nollywood producers to shoot a movie on female genital mutilation as part of its campaign to protect the girl child. The movie was a huge success and got Atkinson on how to harness the potential of the budding movie industry. When her time to leave Nigeria came, she set up the company opening up distribution channels in US, Canada, Europe and Africa.

In the experience of the company, Africa has unique stories that make good sales across the world. The company is currently distributing six titles from various countries. These include award *Dabla Excision*, a documentary on female genital mutilation. Others are *Robert Mugabe: What Happened*, *Operation Survival*, *Progress*, *Gossip Nation* and *Promise Land*. The sales are good because there is demand for such content.

Aya distributes content to multiple platforms and in a variety of packaging. The company has screened movies in Kenya, Nigeria, Ghana, South Africa, UK and US. The company also distributes to televisions and also provides video on demand. Besides Aya sells in flight content to airlines.

Besides selling the content, Aya is also involved in production. Recently, the company in collaboration with a Nollywood Producer began working on a movie on Female Genital mutilation.

Mobile Cinema: Survival strategy for young film producers

Abubaker Kawenja, Broadcaster, Journalist and Theatre Practitioner, Uganda

Kawenja started by pointing out that the major complaint among content producers in Africa is that there is no financing. However producers especially young one need to think around this challenge since funding will always be a problem. Mobile cinema can help young producers to supplement their budgets. This is because the challenges that stand between them and financing are many. Some of the challenges include piracy which means that the producers sales are not guaranteed and poor quality products which means that the premium buys may not be attracted. Other challenges include poor distribution channels for the mass market, which means that a producer stays a very long time before he can take the product to the audience. Further, lack of collateral means that the producers find it hard to get financing from conventional financiers. Other challenges include the tendency of African young producers to work individually thus not benefiting from pooling strengths.

Mobile cinema therefore provides the avenue where they can begin building their resources to help them do productions that can be distributed through other refined channels. This channel has its own strengths as well. It ensures that the producer has total control over the product as well as widening the audience in the long run. It also provides the producer with the opportunity to interact with masses and thereby getting deep insights on how to interact with them.

BROADCASTING: THE IMPACT OF NEW SATELLITE TECHNOLOGIES

How satellite will drive the development of the African broadcasting markets

Christoph Limmer, Senior Director, Market Development and Marketing, Africa, SES, Luxembourg

Broadcasting through satellite will be in the African market for long time. This is because the infrastructure for terrestrial network does not cover the whole continent. There is a common notion in the market that satellite is old and expensive network. However the opposite is the truth in the long run. For example SES has coverage of 99 percent of the world population through 51 geostationary satellites connected to a network of teleports and offices across the globe.

Satellite has evolved over time and is now more flexible and versatile because it combines various functionalities. As the world moves to the digital broadcast, broadcasters would do well to think about how they can maximize the benefits of satellite and terrestrial networks. For example broadcasters need to use satellite broadcasting in highly populated areas and the terrestrial networks in less populated areas. This will ensure that they have control on their costs as they grow their audience.

Besides, the triple play offering in new satellite is a value add that is driving the business of broadcasters. One of the triple play service providers such as Zuku are witnessing a remarkable growth in the African market.

Broadcast Content delivery: Capex or Opex

Steve Rich, Regional Head- Africa, NewSat Australia, South Africa

To make better use of satellite a huge amount of insight is required by broadcasters. This will avoid the deaths of satellite broadcasters that have been witnessed in the Africa. If there is agreement that the rate of satellite broadcasters development is slow what can be changed?

The place to begin is to understand the business model in broadcast. Currently, Pay TV do almost everything in the business value chain. They do content management and archiving, payout services, encryption services, signal broadcast services, internet services, and also end user equipment sales and distribution.

Yet to run a profitably, a broadcaster only requires minimum functionality in the work flow from content to the end user. Business cases have to be built around revenue potential of the market served. Thus, the broadcaster should concern himself with the core needs which in this case are procuring content, packaging the channels, ensuring that there is delivery in the channel, and attracting subscribers.

A pay TV broadcaster needs to breakdown the silos in the workflow to reduce the costs of delivery. This approach has worked well for Zuku. This includes giving up unnecessary non core functions without losing the objectives. This will allow the aggregation of resources and economies of scale in the delivery platform. Business is therefore analysed on per channel basis.

PANELLIST RESPONSE:

Gaethan Donlap Kouanga, Sales Manager Africa, Eutelsat

Gaethan introduced the satellite as still a key communication link in not only broadcast transmission, but also in voice telephony through VOIP and internet access, in what is technically referred to as Triple Play. He pointed out that despite the wide deployment of fibre optic cables across Africa, the last mile link has still remained a big challenge, and a major hindrance to universal access to the internet and affordable high quality communications.

While most internet and data backbone infrastructure service providers have been in favour of Wi-max as the last mile solution, the reality on the ground is that there is still very little investment in this field, which leaves the investment in fibre optic cables idle despite the high demand for its services.

His company, Eutelsat, thus came up to serve the French speaking Western and Central African clientele using the EUTELSAT 16A satellite based in Southern Europe. To make the services accessible even in remote areas, Eutelsat Company launched the "IP Easy" broadband platform, which offers high-speed internet, VOIP and TV broadcast access to homes and businesses across the target regions.

As Gaethan explained, much of IP Easy's success has been thanks to its setup, which is so convenient that with just a small receiver dish and a modem connected to a PC, users can connect to the internet irrespective of their location. Hooking up the system to a TV set-top box opens up a whole new world of free to air digital TV broadcast. This is also becoming an attractive platform for various pay TV broadcasters in the region.

The service also comes with a self-installation feature which enables end-users to autonomously install the complete system with no specific qualification needed or expensive tooling. Upon successful coverage of the French -speaking African countries, Eutelsat is casting its eyes on the wider English-speaking markets of Nigeria, Ghana, Zimbabwe and Kenya among other to further extend their services across the continent.



Kenya's Catherine Kasavuli (Citizen TV) moderates a session at the BFMA 2012. Broadcasters will be competitive with adoption of evolving content models and technologies

THE IMPACT OF MOBILE

Why brands should be using mobile media: Insights into mobile media consumption in Africa

Joel Rao, Business Analyst and Account Manager, InMobi, Kenya

The penetration of the mobile phone is higher than TV sets in Africa. There are approximately 750,000 TV sets in Kenya and over 20 million phones. 49 percent of Kenyans spend time on mobile internet. 53 percent of those who spend the time on mobile internet do so to check sports scores especially soccer when the game is happening.

Therefore, it is important that brands create mobile content that engages the consumers. Further inmobi studies have shown that male subscribers use mobile internet to access sports and news content. 32 percent of women use mobile internet for shopping while 56 percent use the mobile internet to buy music. 30 percent buy video.

Brand should ensure that their mobile content is search engine optimized. This is because research shows that people do not go beyond the first page of the search engine. There is such a thing as search-ads. This means selling through the search engines. Brands must understand this art in order to make use of the platform provided by mobile internet. Brands would do well to create mobile internet websites which are search engine optimized. But they must also understand some basics about consumer behavior online. Research shows that 46 percent of people who use the internet for shopping look for product information and availability while 34 percent look for information about sale promotions.

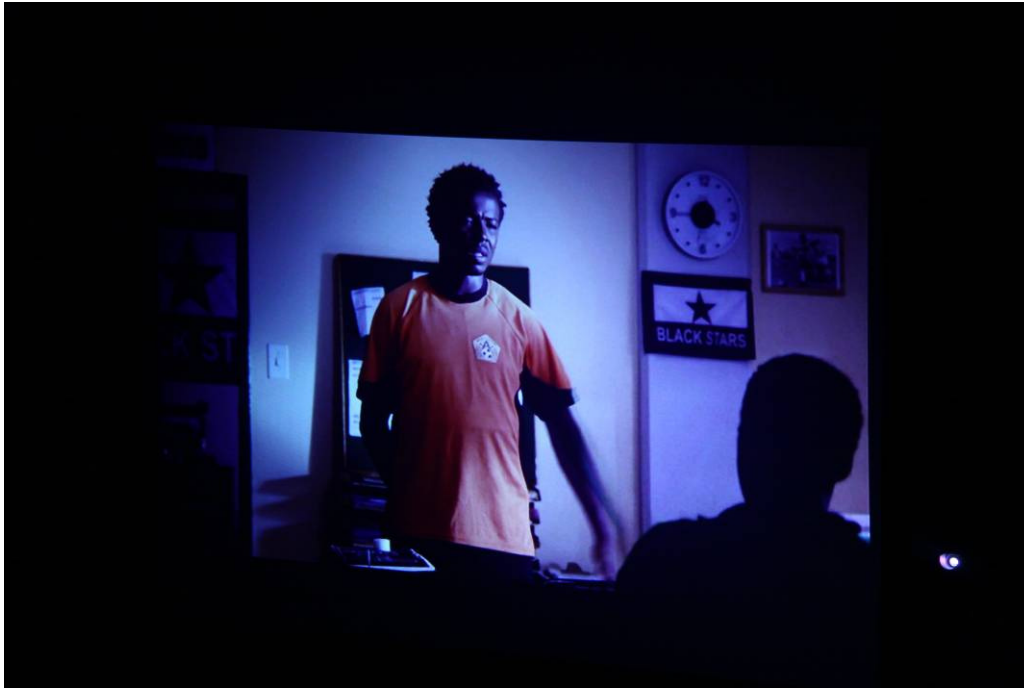
To gain maximum benefits, Brands should combine social media and mobile internet. Research shows the following trends in drivers of shoppers to retailers; 16 percent by online advertising, 18 percent by outdoor advertising, 34 percent by mobile and 42 percent by social media. Therefore a combination of mobile and social media gives access to 76 percent shoppers. To activate such a linkage, the brands need to facilitate social media through mobile.

Mobile content in an evolving media landscape

Nicole Klassen, Head of Content, Bozza, South Africa

Frustrated by failure to push their content through the mainstream media, a group of South African film makers, poets and musicians set up Bozza to distribute content through the mobile phone. Bozza gets short audio or visual content from artists and uploads on its website where people can then

download through their mobile phones. The consumer then pays through the payment system offered by the telecommunication companies in the countries where Bozza operates. However, the business is not profitable. Part of this is because the cost of the downloaded is low and the people with smart phones which are 3G enabled are few. Bozza is exploring how it can grow revenues by attracting advertising.



The screening of the "Inside story" at the 4th BFMA conference

THE DIGITAL TRANSITION 2015 TARGET: ASSESSING PROGRESS AND CHALLENGES ACROSS THE CONTINENT

Presenters: Meredith Beal, Isabelle Kadagor and Nicholas Omondi

Meredith Beal

The session started with an introduction to digital migration in the continent by Meredith Beal.

He took the audience through the various benefits of going digital, among them being freeing up of the current analogue frequencies for other communication services, opening up opportunities for creative content developers to meet demand from increasing number of broadcast channels, besides setting up the stage for implementation of e-governance across the continent.

Nonetheless, Beal explained that there have been a number of challenges towards achieving digital migration. Some of these include broadcasters having

to do away with their heavy investments in transmission infrastructure and having to retrain their staff for digital technologies, content providers having to upgrade their equipment so as to produce better quality productions with High Definition (HD) being the preferred video format, as well as consumers having to meet the cost of the set-top boxes to enable their TV sets receive digital broadcasts.

It emerged that although the global deadline for crossing over to the digital broadcast platform is 2016, various countries across the continent have set their own individual deadlines ahead of time in order to give them sufficient time to implement the necessary procedures and systems, and also testing. The audience was taken through the progress status of the migration across the continent, where Mauritius was the first African country to go fully digital in 2007.

Others such as South Africa and Kenya have been experimenting with simulcast, where they transmit both digital and analogue broadcasts side by side, while Uganda recently formed a task force to explore how the country can adopt the technology.

Isabelle Kadagor

Isabelle Kadagor, the manager in charge of multimedia services at the Communications Commission of Kenya (CCK) took the session through some of the most asked questions in the digital migration process.

She explained that the government in February 2012 formally adopted Digital Video Broadcast Technology 2 (DBVT-2) as the preferred format in the country as it offers 30 per cent savings on spectrum, hence more content per channel, among other benefits.

Isabelle also took the audience through some of the awareness creation activities that the CCK is taking towards ensuring the country goes fully digital by end of 2012. These include campaigns currently running on local TV stations, as well as planned road shows intended to coincide with launching of digital signal receivers in various parts of the country.

Nicholas Omondi

Nicholas Omondi, a senior techie at the Kenya Broadcasting Corporation, one of the only two currently licensed digital broadcast transmission carriers, took the audience through the separate functions of a modern transmission station.

He explained that in the new set up, broadcast stations will only serve the function of providing the licensed transmission carriers with broadcast content, and that the stations won't need to invest in individual transmission infrastructure.

The effect of this will be lowering of the entry barriers for new broadcasters wishing to enter the market. This will also allow the stations to focus more on their core functions of content development and leave transmission to an independent carrier, among other benefits.

Nicholas also outlined the digital signal reception roll out plan for Kenya, where he said that the initial service commissioned in 2009 by President Mwai Kibaki currently covers a radius of 60Km from Nairobi. Mombasa is also compliant, with tests currently being done in Nakuru, Kisumu and Nyeri and other towns to follow in due course.

CHANGING BUSINESS MODELS IN TELEVISION

Africa's audiovisual market: Analysis of production levels, innovations, budgets and financing ecology

Michael Dearham, Senior Vice President, Cote Quest, Mauritius

Distribution of TV content has a very big impact on the broadcast business because it shapes film culture by regulating access to the content. In Africa, distribution infrastructure has largely been shaped by colonial legacy. In this legacy, the infrastructure was mainly urban. Therefore, the production of cinema was based on distribution instead audiences shaping production.

As a result, there is one cinema seat for every 100,000 people in Africa. To date Africa has produced only 3000 movies. The markets are small while the whole industry is stifled by high taxation. Further even in regions that have integrated like East Africa, there exists no attempt to develop regional legal infrastructure to develop the distribution of the production.

The end result is that financing becomes problematic because there is no telling how a production will perform in the market. Banks are reluctant to fund such unpredictable distribution channels while the alternatives such as private equity, pre-sales and sponsorships have not gained currency in sub-sahara Africa.

To break from this colonial legacy, there has sprouted a culture of video economy where producers shoot productions directly to video. However, this culture is largely informal, instatenous and has a high rate of detereorability. There is no reliable data on this phenomenon because there is very high piracy.

In international market, African content does not occupy significant market share. However, there is a high demand in diaspora African communities as well as in blue chip TV channels. The African producers need to know what sells in order to turn this demand into money. For example, there is no Africa tele-novella, cooking and formats.

Competition is growing for African producers. New entrants from international markets have begun shooting African content to satisfy the demand. To beat the competition, African producers will need to develop and strengthen their business process.

Areas of growth that African producers could explore are; straight to video, telenovella for TV, Formats and reality TV, animation, travel, cooking, interactive content and data.

Formats have been growing rapidly in the international arena. 40 percent of the business in the international TV market was formats in the last two years. For example, UK sells 146 formats per year. The key drivers for formats are empowered consumers, collaborative digital enterprise and involved advertisers.

Response to Michael Dearham by Ian Fernandes , Head of Broadcast, Nation Media Group

In response to Dearham presentation, Fernandes said that the African TV managers do not commission production because revenues are low compared to operating costs. This is because advertising is not available as advertising production is very expensive. Pay TV and online platforms are however opening new opportunities.

There is good appetite for local content but the audiences are now demanding content in ethnic languages. This creates the problem of multiple translation to meet the various ethnic and regional tastes.

Further there is no accurate and timely way of measuring viewership. Once a programme goes on air, the measurement of its performance comes after 12 weeks. That means at that initial stage, no advertiser will touch the program. To deal with these, the East African region will need a viewership monitor that is quick.



LIVE CASTS AND WEB STREAMING: A BROADCASTER'S FRIEND OR FOE?

The choice of fate is in the broadcaster's hand

Paul Ojil, MD Soltice Kenya and David Svarrer, CEO, Digital Age Institute

Is webcasting a friend? Let us examine the situation. Webcasting is a game changer in broadcasting. This is because it lowers barriers to entry for all in three key areas; content, technological infrastructure, and licensing. It also has multiple device access ranging from the computer, television set, internet, and mobile phones. It also extends the reach of the broadcasters to global viewership.

Thus, it challenges monopoly and oligopoly. The viewer experience depends on quality of the internet last mile. Content protection can be good because viewers can pay per view.

To deal with the webcasting threat, broadcasters will need to devise ways of survival. They will have to change their mind sets and integrate webcasting in their work.

However, there are several issues that must be dealt with. For example, currently, webcasting is largely not regulated. Even when regulations begin, the problem will be who, how and what to regulate. The other issue is how to

monetize the platform. There is no particular way of assessing the viewership since it is largely global. The flipside is that it is easier to monitor the viewership through clicks on the content.



CHANGING BUSINESS MODELS: RADIO

Phil Collins and Julian Macharia

Phil Collins, MD of Clyde Broadcast, UK brought to the audience's attention the fact that in most cases, a dominant player in the radio broadcast business will most likely have a number of other stations across different geographical regions. A major advantage of this is the ability of the broadcaster to do more with the same content that he has, create wider market for advertisers, and also help clients in different areas reach their neighbourhoods with relevant content about their regions.

Nonetheless, Phil brought out the challenges that this kind of setup presents the broadcaster. Among them was the fact that most of the content tends to be capital-centric, it becomes too costly for smaller advertisers to afford since they are charged the cost of communicating to an entire country while they only needed to talk to a small specific region, and sometimes the satellite stations tend to compete for business with the main station.

This notwithstanding, Phil introduced a model that can help the broadcaster achieve the best of the both worlds, and that happens to be a kind of equipment that his company deals in. Using the Clyde broadcast set up, a station can comfortably run nationwide content even on a regional radio station, and automatically override the content with local station jingles and local adverts, and then switch back to the national broadcast.

Also, the system can provide an opportunity to create wider awareness of the various satellite stations, whereby each station can speak to the national audience on a specific issue of national interest happening in their geographical area. In this way, the overall cost of human resource and training comes down significantly as talents can be used across the entire network. It also becomes easier to integrate local content in broadcasts, thus creating a sense of local ownership of satellite stations.

Julian Macharia

Julian Macharia, Deputy Programmes Director, Royal Media Services, took the audience through the changing world of radio broadcast, and what broadcasters need to do in order to survive. He explained that the East African radio market is already saturated, yet it continues attracting more players by the day, further segmenting the market and reducing the amount of revenue that a station can earn. To illustrate this, he pointed out that more than 10 new radio stations have been licensed in Kenya alone since January 2012.

As a result of the fierce competition, the stations are approaching clients directly and cutting deals, in the process reducing the role of Public Relations (PR) and advertising agencies, which earlier handled media buying on behalf of clients.

As a strategy to survive, Julian told the audience that radio stations have to go beyond voice and offer more value added services to their audiences, such as market research through live call in programmes, production of commercial adverts, as well as organizing road shows, exhibitions and activations on behalf of their clients. Presenters also have to create public presence through new media such as Facebook and tweeter as a way of interacting with their audience.

Julian cautioned that tough as the market seems at present, digital broadcast will usher in a whole new competition platform which will attract even more players, and so radio broadcasters will have a bigger challenge of not only maintaining and attracting audience, but getting good quality clients too for business.

THE DESIGN AND REPACKAGING OF A DEFINITIVE COLLECTOR'S PIECE

Brian Whitehead, Senior Lecturer, Graphics Design, University of Creative Arts, Epsom, UK

Brian Whitehead began his workshop with an introduction of the Pixies, a successful American rock music band formed in 1986, and which made most of its fortunes in the UK.

The Pixies, comprising Joey Santiago, Kim Deal and Charles Thompson IV (Black Francis) had a unique kind of music that inspired many artists. True to the dictionary meaning of the band's title "mischievous little supernatural beings", most of the band's compositions were based on raw emotions, surrealism, sex and violence, and most of the songs contained bizarre, fragmented lyrics about space, religion, sex, mutilation, and pop culture. The band wanted to have their music packaging to reflect their kind of music, and so had to get creative artistic impressions on their collector's packaging. Brian Whitehead had the pleasure of being part of the design team that comprised photographer Simon Larbalesteier, designer Vaughan Oliver and creative arts students from UCA.

The initial work involved sorting out massive amounts of graphics and photos taken from as far as the Middle East and Asia, as well as artistic compositions from part of the team in order to come up with as close as possible an illustration of the images that reflected the reality of the Pixies' new and unique kind of music. Among their most successful albums were *Come On Pilgrim*, *Surfer Rosa*, *Doolittle*, *Bossanova* and *Trompe le Monde*, all which are in the collector's piece designed by Brian's team.

Brian had a collector's pack from the work of the team, which he used to illustrate the various stages that the team went through in the development process. He explained the rigorous composition process from design conception, individual artistic impressions by the various design team members, studio works, picture exhibitions to judge the possible effects of the images on the audience, to the coming up with the final composition that the team eventually submitted to the printers for production.

In the end, the team came up with a hard cover book-like packaging that bears the surrealistic images of the ideas expressed in the band's music. What's more, the collector's piece bears equally hardened thick pages with glossy surfaces, with the band's CDs, DVDs and Blu Ray disks are embedded. This was referred to as the slip case. The pack also bears images of the band members and their inked hand prints on opposite pages - characteristic of the band's style of rawness in their self-projection.

After the band broke up in January 1993, the team later reunited in February 2004 for a series of live shows, which they did until 2011. As Brian explained, these presented a great forum through which the band signed autographs and had huge sales of the collector's pieces bearing all the music that the band had recorded and produced with various companies, such as 4AD and Elektra Records.

Ultimately, it was clear that the design team succeeded in creating a rare kind of collector's piece that not only appeals to aesthetic senses, but also a true reflection of the nature and character of the band and their music – one that had a significant influence in the emergence of alternative rock culture in the 1990s.

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