

UNITED REPUBLIC OF TANZANIA

COMMUNITY TELEVISION FOR THE POOR

A SCOPING STUDY

Country Report

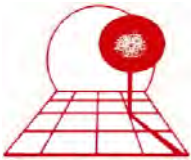
Tanzania

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**12th February 2005.
Dar es Salaam, Tanzania.**

Interim Document for "Community Television – a scoping Study"

This document is an output from a project funded by the UK Department for international development (DFID) for the benefit of developing countries. The views expressed are not necessarily those of DFID.



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Executive Summary

There are 34 operational radio stations in Tanzania, of which, 31 are FM and the rest AM stations making radio still the most appropriate communications technology that is available to the majority of people particularly the disenfranchised rural communities, women and the youth. This is so because though at an increasing pace, there are 32 cable television operators, with only 16 of them at commune level, even though they are based at district headquarters.

Tanzania's only national radio, Radio Tanzania Dar es Salaam (RTD), is state-run and sometimes promotes awareness of development and social issues. Today, there are other independent stations that include Radio One, Radio Tumbaini, and Coast Television Network.

Major television stations that include leading TV station – the Independent Television (ITV), owned by IPP Limited and the state-run Television Tanzania (TvT) make five television stations in Tanzania, including the independent ITV, DSM TV, CTN and CEN.

The growth of the broadcast media has been hindered by the lack of capital investment needed to set up TV and radio stations - public and private. Recent proposals to reduce licensing fees for local/community radios and TVs promise an increase in number of stations in the near future

Community-based media which ensures media pluralism, diversity of content, and the local representation has not diffused well in the country except for the few community radios such as Orkonerei (Simanjiro), Kwizera (Ngara) and Sengerema (Mwanza) which display as models.

Except for the state-run Radio Tanzania Dar es Salaam which broadcasts development materials, most private radios are entertaining and air business advertisements, with 'hardly' any information regarding community development.

While it is relatively cheap to start a community radio; but it is expensive to run it in terms of developing relevant local content which is costly (need skills, equipment, resources). Costs for the air time, running studios on fuel power generators as there is no electricity in rural all add up to unaffordability of such ventures.

Stronger financial commitment by both public and private sectors to support broadcasting is inevitable and these can well be supported by the public-private partnerships; and revisiting high licensing fees and time for their licensing of community broadcasters. Use of skilled volunteers for running it is an option.

Combination of video and audio and use of other video and interactive media (mobile cinema, outdoor media, Internet) adds value to whatever the radio or television is broadcasting to communities.

1. Overview of Broadcasting in Tanzania

The most recent data available at the Tanzania Communication Regulatory Authority (TCRA), there are 34 operational radio stations; of which 31 are FM and the rest AM stations. Moreover, there are 15 major TV stations and about 16 minor ones. Most of these stations are based in major urban centers.

There is a rapid increase in cable television operators throughout the country, with TCRA data having in record a total of 32 operators with about half of them being major. At a more commune level, there are 16 'TV operators' or small community stations, majority of which are run by District Councils all over Tanzania, and are based at district headquarters.

Initially, most radio and TV stations used to fill their airtime with foreign programmes, but at present, a greater portion of programming has been replaced by locally produced programmes, some of which are becoming famous and are attracting viewers and listeners in East and Central Africa. The concept of regional integration has been well spearheaded in the local media with a number of media organisations attempting to establish regional TV and radio networks such as the East Africa Radio and TV, stations owned by the IPP Media and covering all capitals and other towns of East Africa.

Introduction of satellite broadcasting technology in the industry and the review of the Tanzania Broadcasting Act has enabled many TV and radio stations to cover almost all Tanzania. Furthermore, the use of satellite and Internet broadcasting technologies enable people as far as in West Africa to enjoy popular programmes. Also, the latest cinema technology is trying to revive the industry after the first world-class cinema opened in Dar es Salaam. The industry has also seen a number of local productions being launched.

2.1 Digital divide

Efforts to eradicate poverty through development that is endogenous, bottom-up and community-driven are increasingly hinging on the harnessing of information and communication, now seen by many as the "missing link" in the development process.

As is the case in most developing countries including Tanzania, radio is still the most

ICT backwardness for developing countries

- As of 2000, about 70 percent of the world's poor live in rural and remote areas, where access to information and communications technologies, even to a telephone, is often scarce—over one-third of the world population has never made a telephone call.
- As of 2000, the developed world had 49.5 phone lines per 100 people, compared to 1.4 phones per 100 people in developing countries.
- Most of the information exchanged over global networks such as the Internet is in English, the language of less than 10 percent of the world's population.
- The Internet population, in most countries, is overwhelmingly male. Even in those developing countries where women seem to be catching up, the number of Internet users is generally less than 10 percent of the population.

appropriate communications technology that is available to the majority of people particularly the disenfranchised rural communities, women and the youth.

Research has shown that systems for networking information and knowledge are most effective when building on existing local information systems, incorporating community intermediaries - institutions and individuals that serve as a bridge between the Internet and the community. Radio is already established as a key component of local information systems and has the characteristics that make a good intermediary.

Information and communication are no longer seen as the prerogative of national governments and international development experts, but as the basic tools of the poor in their own efforts to improve their lives. This is echoed in findings of many baseline studies on people's needs: members of the poorest communities often identify the deficit in communication and information as one of their most acute problems.

It is essential that the bottom-up effort at community level should link to, complement and be reinforced by national policies. This is because the appropriation of knowledge through information and communication is a human development issue and while it needs support from the top, it is not a technical or material resource issue that can be handled at the top. Information and communication technologies (ICTs) offer the means for communities to identify and implement their own solutions leading to human, social, cultural and economic development goals. It is therefore essential to expand the access and content production. Governments and development partners can and should be supportive of this process, with the driving force found within communities themselves.

Table 1: The ICT sector can be summarized as:

Market Structure	Fixed lines: Monopoly till Feb 2005 (incl. Int'l voice traffic; mobile: competition; Internet: competition; Data: competition*
Fixed line operators	1 (2)*
Mobile phone operators	3 (4)*
Internet service providers	13
Digitisation of network	95
Number of fixed lines (per 100 habitants)	180,000 (0.50)
Number of mobile phones (per 1000 habitants)	260,000 (0.66)
Number of public phones (per 1000 habitants)	1000 (0.03)
Number of e-mail/Internet subscribers (%)	20,000
Number of PCs per 1000 habitants	2.4 (1999)
Number of public access points to Internet (mainly Dar)	>200
Local call charge per minute: fixed phone (US\$)	0.02*
Local call charge per minute: mobile phone (US\$)-peak post paid rate	0.25*
Average dial-up cost for a month using 30 hrs (flat rate)	49*
Radios (penetration rate, % of households)	1.52 (1997)
TV receivers (penetration rate, % of households)	7.90 (1998)

*Source: ITU, WDR; * October 2001*

Television came late to Tanzania as it was previously considered a luxury with potential for widening the gap between rich and poor. The State TV (Televishehi ya Taifa – TvT) was officially launched in 2001, several years after the first private TV station (Independent Television – ITV) went on the air in 1994. Still, radio remains the dominant broadcast medium.

The growth of the broadcast media has been hindered by the lack of capital investment needed to set up TV and radio stations - public and private. Despite this, dozens of private FM radio stations are on the air, majority of which are concentrated in urban areas. News bulletins from international radio stations - including the BBC, Voice of America and Germany's Deutsche Welle, are carried by many stations. Recent proposals to reduce licensing fees for local/community radios and TVs promise an increase in number of stations in the near future.

2.2 Rural Connectivity

Tanzania, with 75-80% of its population living in rural areas has done little to connect the rural population. The Tanzania Telecommunications Company Limited (TTCL) rural outreach in 1998 reached 17-20 000 lines mostly being connected to district capitals. However, the licensing terms oblige TTCL to cover each village with more than 3 000 inhabitants with at least two public phone facilities by year 2005. This is not likely to be achieved following a non-compliance row between the Government and main investor of the privatized TTCL. Recently, cellular phone operators have become the main drivers for rural connectivity.

The Sengerema Multi-purpose Community Telecentre (together with such MCTs in Kasulu, Magu) is a pilot project under the Ministry of Science and Technology and Higher Education with the objective to improving communications in rural areas. Sponsored by International Telecommunications Union (ITU), United Nations Education, Scientific and Cultural Organization (UNESCO), International Development Research Council (IDRC) and COSTECH, it offers a wide variety of ICT services and applications, often including libraries, conference facilities, training programmes as well as special provisions for small enterprises, distance education, tele-health, e-commerce and the like and, hence, emphasising their potential to serve as a vehicle for improved integrated rural development.

2.3 Radio and Television Stations

As of January 2005, Tanzania is dominated and largely covered by the state-run Radio Tanzania Dar es Salaam (RTD) which has been in place since independence. It is however, challenged by the popular independent and private radios such as Parapanda Radio Tanzania (PRT) a - state-run FM station set up to counter competition for younger listeners from private stations; Radio Free Africa (RFA), a private FM network; Radio One - private network owned by IPP group; and Radio Uhuru - private FM station, to mention a few.

There are a number of other private FM stereo radios (e.g. Kiss FM, Clouds FM, Orkornerei Radio Service – ORS, and Voice of Tanzania-Zanzibar).

Except for the state-run Radio Tanzania Dar es Salaam which broadcasts development materials, most private radios are entertaining and air business advertisements, with 'hardly' any information regarding community development.

Mainland Tanzania has been the biggest country in the world without television, with television broadcasting beginning only from Dar es Salaam only in 1995. Despite the late coming, like Zanzibar, which pioneered establishment of color television in sub-Saharan Africa a quarter a century ago, Tanzania Mainland became among the pioneers of opening their doors to digital satellite television in August 2000.

Independent Television (ITV), owned by IPP Limited has become the leading TV station in Tanzania. It is also the only station linked by satellite to all of Africa. The station re-transmits programmes from the BBC, CNN and Deutsche Welle. The recent addition of the state-run Television Tanzania (TvT) made five television stations in Tanzania, including the independent ITV, DSM TV, CTN and CEN.

More details on broadcasting in Tanzania is in **Annex 2**

3. Policy Environment and Regulations

Some of the objectives of the policy on media are key, including the promotion of a pluralistic, free and independent media, enhancing democracy, and reinforcing human rights. Implementation of the policy brings Tanzania into line with international standards and trends by making a commitment to allow national private broadcasters, while maintaining support for community and local broadcasters. The policy also recognises the success and importance of the Media Council of Tanzania (MCT), a self-regulatory mechanism whose establishment ended official threats to establish a statutory media council. Finally, the commitment in the policy to quality education and training is noted to be a key means of securing effective respect for freedom of expression.

The policy notes numerous responsibilities of the media, media owners, newspapers and magazines, news agencies, radio and television, films and videos and media associations.

The Government of Tanzania's decision to scrap off all taxes in ICT equipment shows its commitment and support for ICT diffusion in the country. Not only that, Tanzania is one of the first Sub-Saharan African countries to have own ICT policy ratified and is now at advanced stages for its implementation. Proposed tremendous reductions in licensing fees for community radio and television will see ushering in of numerous rural radio and television stations in the country, especially, the rural areas.

4. Television and Radio for Development and Empowerment

Bringing information and communication technologies (ICT) to rural or remote areas is a key challenge to harness the potentials of ICTs including the radio and television for development. Targeting remote and disadvantaged communities is often high on the political agenda and reflects the many efforts to attack a national digital divide that has developed alongside urban-rural and centre-periphery relations. In Tanzania, like in many other developing countries, rural areas provide habitat for the majority of people, and therefore the provision of basic telecommunication, email and internet services is a critical issue. However, the widespread poverty, lack of skills and scarce resources stagger ICT utilization. Furthermore, technical solutions for internet connectivity are more complex and often need long distance solutions to hook up the many individual and isolated regions. Hence, building the necessary infrastructure and covering the running costs, especially of connectivity, puts a much higher burden on rural communities.

The idea of public access telecentres has matured ever since and remains the predominant focus on rural ICT access until today. Some 'phone shops' or 'public call offices' (PCO) equated to mini-telecentres only provide basic telecommunication services, but some upgrade their business by adding computers, internet connection and peripherals and again others offer a wide range of ICT services including awareness building, training, and extra provisions for specially chosen target groups.

4.1 The Radio

Tanzania's only national radio, Radio Tanzania Dar es Salaam (RTD), is state-run and sometimes promotes awareness of social issues. In the early 1990s, the government used RTD to

lead a campaign in support of family planning by airing episode series regarding family planning methods. The campaign proved highly successful, leading to an increased use of family planning materials among people. It proves its usefulness to development.

Radio Tanzania produced a radio play entitled *Twende Na Wakati* (Let's Move with the Times), aired twice a week for thirty minutes and was highly acclaimed by the local communities. For six years, *Twende Na Wakati* addressed a range of topics varying from fertility, family planning, maternal and child health, AIDS and STDs, to the need to educate girls, the fight against domestic violence and all sorts of discriminatory cultural practices such as excision. Public awareness in the rural world on such moral issues was the strongest impact of this project.

Today, there are other independent stations that include Radio One, Radio Tumaini, and Coast Television Network. While private radio and television stations broadcast in Dar es Salaam and a few other urban areas, they do not produce enough of their own news due to low budgets. They carry foreign news, with a small percentage of local news.

IPP Limited, one of the largest private sector companies in Tanzania, is one of the main supporters of the private independent media, including both radio and television. Radio One, for instance, is owned by IPP Limited and has grown to become the most popular private radio station in Tanzania, broadcasting music, drama, local and foreign news as well development programmes.

Community Radio

Community radio is often seen as a way of enabling people in poor communities to access the mass media to make their voices heard. It is also linked with the promotion of participatory models of development. These stations assist members of communities to share ideas and viewpoints, as well as participate in deliberations about their future

Financial sustainability is one of the biggest challenges facing existence of community stations as establishment of majority of them is donor-funded and initial running supported. However, upon conclusion of such aid, they find incapable to sustain themselves considering their low income generation and the low income by majority of beneficiaries. Often, some would-be payable announcements (like loss of a child or animals in a village) are waived on humanitarian basis-denying the stations income. To encounter high running costs for example, stations use volunteers for information seeking and studio broadcasting. These however, as they become sufficiently skilled eventually move to pay-jobs.

Since infrastructure layout in the rural areas is poor, community radios/TVs are prone to operating on power generators which are very expensive to run. Running a generator for only seven hours in Orkornerei costs about TShs. 50,000 a day.

Potential local partners are obviously numerous, since they need the radio stations in order to broadcast information of a national character (administration and local communities), or as a means of communication, extension, activity promotion, etc.

4.2 One Nation, One Language

As Swahili had been declared the national language, when radio broadcasting started, it was sensible to use Swahili because the language was understood by the merchant class up and down the coast, and they were the people wealthy enough to have receivers. As the government began broadcasting more to the interior in 1960s, there were pressures to add broadcasts in some more widely spoken local dialects, but this was resisted by the government and instead, RTD joined schools and government offices as a means of spreading Swahili throughout the nation. When English language broadcasts were dropped in 1970, Tanzania

became the only African country to use only one language in its domestic radio (English is still used in the external service).

In order to maintain and preserve the Tanzanian culture including music, RTD has had recording safari ventures to villages to record regional news and music.

While entertainment has helped bring the country together, education is needed for it to progress. The government has had major programmes to build schools in the villages with RTD participation with several hours of educational programmes each day, not only covering the formal school education but also in adult education. RTD has been in the forefront in sensitizing thousands of villages in campaigns in health, agriculture, natural resources, etc.

Community-based media ensure media pluralism, diversity of content, and the representation of a society's different groups and interests. It encourages open dialogue and transparency of administration at local level and offers a voice to the voiceless. They are established on the concepts of public access, sharing experiences and information.

Traditionally, there has not been true 'community' radio. Most radio used to be government controlled. But recently, there have been developments towards a community radio sector. There are some community stations opening up in Africa, but only a couple, mostly FM/stereo local radios are on the offing in Tanzania. Majority are privately owned but also a couple, are owned by the local district councils, universities, churches, and only very few real 'community' such as Orkornerei (Simanjiro), Sengerema (Mwanza), Kwizera Radio (Kasulu).

4.3 Local Content

Equally important is creation of locally relevant content. Customising content is an urgent need. It's not just translating global content into local languages and dialects, though that too is required. We need local language standardisation, online meta-content like directories and search engines, and affordable access devices.

While there are many Tanzanian websites, most of these are in English and are not updated regularly. Many appear to be merely an advertising presence on the Web. There are a number of vibrant websites with the majority publishing local news on the Web, while others demonstrate some convergence by giving access to local radio programmes on the Internet. Despite the innovation of relatively few websites, the Web has yet to become a dominant medium for society to communicate, particularly because of the few websites that are in Kiswahili. However, an encouraging phenomenon is that Kiswahili is recognised as being the African language with the greatest Web presence. It is now a recognized official language at the African Union proceedings, Google search engine is developing a Swahili version, and there are a number of online Swahili dictionaries online.

4.4 Television

The ITV among other TV stations, emphasises on the villages as is well reflected as special mobile studios travel the countryside producing programmes in every corner of the country. Still, there are concerns that this will cause urban/rural divisions - only about 20% of the population will be within reach of the main station and its six repeaters and even once another dozen repeaters are added in a few years, less than half the population will have coverage.

Television is not used the way it could mostly because of the costs involved. In some countries where it is well-developed, community television can host debates and interventions, giving

them the reach that working with small specific groups cannot have. But this is seldom the case.

In other countries, there is sometimes the possibility to connect with the producer of development programmes and use television to illustrate the realization of a given community initiative, thus influencing other communities to embark on such a venture. But again, this is not very common.

There is a lot of potential though to use television in a participatory way by relying on community television viewing and discussion clubs. Experiences in India and Africa have been quite successful in using that tool. But again, costs have made it unsustainable.

Community television or radio focuses first and foremost on the local community by involving volunteers to produce and broadcast its broadcast menu. This form of community based media has two other significant characteristics which differentiate it from public: community television or radio has a political agenda which focuses on the disenfranchised and leftist perspectives; and it is largely driven by a passion for expression and spontaneity with a lesser emphasis on building audiences for financial growth and organizational stability.

Community Television Potency for Rural Development Communication

Infrastructures and basic government services (health care, transportation, education, post

offices and telecommunications, culture, leisure time activities) are lacking in the rural areas. Television is inaccessible to the rural people, due to the lack of electricity, their low purchasing power, and seldom, the uninteresting programming that may be in the offer.

The videos borrowed from Resource Centres are usually shown when conducting workshops in the communities, to reinforce theories. Videos are better than audios in terms of better vision and hearing and by enhancing the communicator aims at influencing emotions/thinking/action. At times, where appropriate, and where video-showing set is incomplete, sound only from the videos can be aired on radio.

At the Community Resource Centres, a satellite dish is installed for capturing TV airwaves for broadcasting to communities at a very small cost. However, not all communities have satellite dishes (expensive equipment and its running is costly). Since there is no power in Simanjoro, video shows and the radio are run by gasoline power generators, costing a minimum of TShs. 50,000 for a 7-hour broadcast daily.

In order to reach distant communities, Ilaramatak-Lorkonerei also has movable power generator that are, together with video projection equipment can be loaded on a car to make a show.

For its sustainability, the video project has strived to do a reputable quality job to an extent of attracting outside organizations, especially religious choirs which use it to record their songs. The project is lucky to have skilled staff and a few volunteers to do the job.

Television combines visual appeals, sound and motion in message presentation to make it more understandable and remembered than other media; targeting large, diversified, heterogeneous and scattered populations. It is capable of promoting linkages and integration in the social, political and economic spheres; influencing human behaviour, for social work; and in the transmission of news, information, ideas to others. It helps inspire young people to join working groups or can drive them

make their own group engaged in economic and productive activities.

4.5 Video Recordings

Today, digital video cameras make the use of video simple. They come with batteries that can last up to 7 or 8 hours, and can fit in a small backpack. They also have a screen that can be used not only to capture but also to show immediately the images to a small group of people. They are very easy to learn to operate and handle and make a good tool that community members can use by themselves.

Video records are used to illustrate a given problem or to demonstrate a given solution, by way of a programme put together by the research team or produced elsewhere.

A powerful utilization of video is what is known as the “Fogo Process” (the name comes from a Canadian island where it was first used). In this process, video is used to introduce an issue and is followed by a community discussion. The discussion is captured and shown to the community afterward where it triggers other discussions to bring forth a consensus for action.

Video is also more effective when it positions a problem and documents the causes without suggesting solutions. Those are to come from participants viewing the documentary.

As in the example of disposable cameras, it can also be a tool put in the hands of community members for them to show an aspect of a problem or solution, or record a “video letter”.

In some contexts, the discussion of the issue by a community can also be shown to other communities, where the discussion is also recorded, etc. These have been used by a number of government (Farmers’ Education & Publicity Unity of the Ministry of Agriculture), community (Ilaramatak-Lorkonerei in Simanjiro), churches, NGOs (iNADES) to take message across communities in rural areas.

4.6 Audio Recordings

Audio recording can be used to capture the views of community members and stir a discussion afterward on these views. The recording can be played on tape recorders in the context of a community meeting or small group discussions, but it can also be broadcast on the radio when such collaboration has been achieved.

Audio recordings of songs and dances and the use of small audio players can also be effective tools for community members working with the research team to reach other members of their communities.

Audiocassette forums have also been used with some success. In this approach, tape recorders and cassettes are given to specific community groups, who decide on their content and discuss the problems and potential solutions to implement.

4.7 Development News on Radio and Television Stations

While it is the public radio (RTD) and television (TvT) who take up to 35-50% of their airtime broadcasting development news and information in such issues as natural resources management, education, agriculture, health, social welfare and gender, etc., with the exception of the leading private radio (Radio One) and television (ITV); majority of the private radios particularly the FM stereo ones play music and other entertainment with short intermittent news broadcasts. Other private televisions are no better in that, they mostly re-transmit foreign station news and entertainment programmes.

It is with community radios such as the Orkornerei who for most of their time (about 50%) broadcast development news complemented by entertainment, news broadcasts, announcements for the remaining time. It has been noted that other community radios in Sengerema, Shinyanga and Lushoto (unregistered) for example, apportion their broadcasting time in about same ratios.

4.8 Combining Community Radio and Telecentres and other Media

Community radio is less costly, easy to operate and reaches all segments of the community through local languages and can offer information, education, entertainment, as well as a platform for debate and cultural expression. As a grass-roots channel of communication, it maximises the potential for development to be drawn from sharing the information, knowledge and skills already existing within the community. It can therefore play a catalytic role for community and individual empowerment. However, community radio usually operates in a self-contained world within a very limited broadcast radius. To access and exchange information with the rest of the world, links via telephone, Internet, e-mail, fax, satellite, television and newspapers are required, thus prompting its inevitable combination with other media 'carriers' such as telecentres.

A Multipurpose Community Telecentre (MCT) overcomes the technological barriers to communication, access and exchange of information with the rest of the world. The use made of the MCT by certain members of the community - teachers, health workers, etc - can be of great benefit to whole segments of that community: their students, patients etc.

Community radio/TV and MCTs are clearly complementary and can function in parallel in the same community, offering a broad spectrum of distinct services. However, when their traditional and innovative technologies are actively combined, they can offer far greater possibilities for engaging a community in its own development. The possibilities generated by the combination of the two are not confined to quantity or range; the qualitative nature of those possibilities also changes. This is because of the particularly dynamic relationship between communication and information, between contact and content. The combination of a grass-root public platform with access to information highways promotes the public debate and public accountability that are essential for strengthening democracy and good governance.

The specific "added value" which is offered by the community multimedia centre derives from the unbroken continuum it establishes between different types of information, between people with different levels of learning and between the different levels of contact both within a community and between that community and the rest of the world. The community multimedia centre, as an inclusive, "info-rich" force for development, not only meets identified learning and information needs, but also creates a new demand for learning, information and knowledge. This has been evidenced at Sengerema MCT.

The combination of local radio with a community database developed by local people, building up a store of relevant data for educational, informational and developmental requirements, provides a solid knowledge base for the illiterate and the literate alike. This is a transfer of technology, which encourages rather than diminishes the cultural self-confidence of its users.

The Internet

A number of Tanzania's papers are available online, including the Daily News, the Guardian and Swahili dailies - Nipashe, Majira, Rai, Alasiri/Dar Leo, etc. While a poor telecommunications infrastructure used to be a major problem for the nation, Tanzania is undergoing "rapid modernization." Computer users no longer experience major difficulties spreading e-mail or logging onto the Internet. Dar es Salaam in particular has seen major improvements in infrastructure and now houses a half dozen Internet Service Providers (ISPs). While network access outside Dar es Salaam is still somewhat limited, it is expected that the

same multi-funder Tanzanian Restructuring Program (TRP) that brought sweeping changes to Dar es Salaam will soon bring improvements to other Tanzanian towns.

Taking example of Kilosa, new communication technologies which have recently been installed at Kilosa District headquarters is evidenced by the upgrading of the telephone system from an exchange network to a new, wireless local loop (WLL) telephone system as one example of how ICTs can bring improvements to communication processes for development purposes. With this new wireless system, senior staff members at the District level now have direct telephone lines, and are able to dial directly to areas outside of Kilosa town. This advancement has enabled staff to bring new technologies such as fax machines, electronic mail (Email) and the Internet to their offices.

The Tanzania Communications Commission (TCC) has licensed nine companies to provide public data communication services including Internet bandwidth. These data operators have isolated initiatives of connecting their Points-of-Presence (PoPs) to the global Internet backbone. As a result, Tanzania lacks cheaper and high capacity connections to the global Internet. All connections, regardless of the data service provider, are small capacity international links that connect to the global Internet backbone in different countries such as Norway and the United States. Therefore, the limited international Internet bandwidth is scarce and somewhat expensive.

There are presently sixteen licensed ISPs in Tanzania providing between 10,000 and 15,000 dial-up accounts in the country with many more users via Company and Government LANS and Internet cafés. Available e-readiness studies suggest that there is a large unsatisfied demand in the country for Internet access.

5. Other Video Media in Use in Tanzania

5.1 Mobile Cinema

This is a new medium of communication in Tanzania. There are two operators at present covering Tanzania. Touchline is now operating circuits 1, 2 & 3 and plans to start more circuits soon. There are also some mobile cinemas that are run by church organisations and some government ministries e.g. Ministry of Agriculture & Food Security. This medium consists of vans carrying a videonic projector and screen. The operators vans travel on fixed monthly itineraries from location giving free out-door shows in the evenings.

They provide a unique opportunity of reaching a more rural and down-market audience with this powerful medium. The adult audience is predominantly male but half the audience consists of children of both sexes and therefore provides a unique opportunity of establishing brands with the future generation. Shows consist of a combination of documentaries, cartoons and feature films interspersed with advertising breaks. The operators target densely populated areas and new areas of cash crop development.

In addition to screening of movies and commercials, the operators are amenable to perform other marketing tasks such as distribution of leaflets and samples as well as playing jingles over the speaker system prior to the show and during intervals.

5.2 Outdoor Media

The use of outdoor media as an advertising tool is advancing rapidly in Tanzania. There is a growing awareness of the power and impact of this form of communication and consequently an increase in its use. The industry is fragmented and not yet organized.

Monier International

Monier International specialize in the setting up of billboards and promotion posters. They were the first company to introduce the full colour photograph posters for billboards. They are also involved in the installation of shop name signs across the country, putting up advertisements on the national stadium and full colour banners at Dar es Salaam International Airport, and also on public transport.

Corpcom

Corpcom Outdoor is the other major outdoor holding in Tanzania. They have dynamic billboard opportunities located on major arterial routes and high traffic areas including the international airport.

5.3 Outdoor Marketing and Promotion

Outdoors Promotional Marketing is used to focus on a person-to-person basis, it is therefore also known as direct marketing. In Tanzania, its use has been limited in the past, this is now changing with the emergence of promotional companies and the realisation of benefits of the method of the advertising clients. The benefits of direct marketing include introduction of a brand to a consumer, and are also designed to build and maintain long-term brand growth. The method is also appropriate because of the feedback generated through dealing directly with the consumer.

Roadshows

The vehicle covers all key areas of the country of operation with target of reaching mass mixed audiences of all income and age groups. The Roadshows offers communities that are starved of entertainment an opportunity to participate in and enjoy a live, fun and interesting show. Each participating product receives thirty minutes of dedicated promotional time, educational about the products uses and benefits, sampling and distribution of a product related literature.

Jamii Yako

This programme has been designed with the specific intention of reaching ladies. The key advantages of this promotion include a dedication promotional opportunity aimed at decision-makers in respect of household products. The audience is able to ask questions and understand a product that they may have previously seen advertised but had not understood it. Jamii yako include a specialist food program called Mapishi Bora. An exclusive quality magazine is given away free of charge to all ladies who attend the meeting.

Clinics Programme

This programme is named Tunakujali, each product receives 15 minutes of exposure at both public and private clinics in Tanzania. The relevant authorities have endorsed the programme, which will provide a much targeted medium for medically oriented products, or related categories of products.

6. Funding for Radio/TV Development Programmes

The funding of public radio and TV is mainly by the government though in many instances, NGOs and donors (again, through government) support broadcasting of development programmes. There are some development programmes that once in a while could be self-supported in the designed self generating arrangements.

Private radios and TVs are solely self-sponsored, and so are private community ones although NGOs and donors could be supporting some of their development programmes that are directed at the grassroots population.

There are a number of sponsored programmes broadcasted by both private and public media. The sponsors determine content of the programme.

There are a few observations made when comparing public to private media houses:

- Majority of the private broadcasting stations have an interest in making money out of their programmes and give low priority to community development issues;
- There is insufficient relevant local content developed for broadcasting. For example, almost nothing comes from the regional and district authorities for broadcasting in Radio Orkornerei, although, encouragingly, some programmes come from the national levels e.g. Local Government Reform Programme, Prime Minister's Office, etc.;
- Running community radios is expensive and beneficiaries should learn to take up the burden of running them and contributing for their sustainability;

Community radios in the country should be prepared to compete with commercial radios in terms of costs and quality of service.

7. Challenges and Constraints

Upon consultations with the stakeholders, the following were noted as factors constraining community broadcasting:

- Development of local content is a costly undertaking in terms of expensive equipment, inadequately skilled manpower, and insufficient resources;
- The high running costs of broadcasting (on the air hours), material collection (manpower and gadgets), processing of information (editing suit), servicing and maintenance of equipment;
- Compounded by the above, although there could be sufficient materials for broadcast on development, the channels for their dissemination, i.e. community radios are not there in place (only a couple, so far);
- Public dominance over radio broadcast. Must learn and practice the public-private partnerships in broadcasting;
- Deliberate efforts to further develop enough of the development programmes with the involvement of lead public sector and the private and local stakeholders such as ministries (health, agriculture, education) with the District Councils

7.1 Possible solutions for future improvement:

Both the public and private broadcasting entities should strive to upkeep the good spirit of reaching as much of its target clientele and providing it with suitable relevant information. These can be achieved through:

- The public-owned broadcasters must strive to improve on their development programmes and include entertainment programmes to relief monotony and boredom of high political advocacy and only as government vehicle;
- The FM and stereo radios that are popular in their area of coverage, should also blend their entertainment programmes with some development programmes;
- Local radios at zonal and regional/district levels are a step towards 'community'broadcasters and should strive to develop suitable-to-locality development programmes for broadcasting, with the involvement of all stakeholders;
- Training of staff, and equipping them with proper working equipment;

- Undertake awareness campaigns for users and producers so they each know what to produce and what to consume;
- Stronger financial commitment by both public and private sectors to support broadcasting is inevitable;
- Revisiting the high fees and time for their licensing of community broadcasters

7.2 Opportunities for Community Broadcasting

There are many prospects for the community broadcasting in the country that includes increasing numbers of applicants who may apply for establishment of community radios/TVs, enlightening possibilities for lowering tariffs and fees for community radios/TVs, and especially the support indicated by the government in the national ICT policy. Specifically, the prospects include:

- There is an increasing commitment by the private sector and NGOs in supporting establishment and supporting of community radio and TV;
- The use of mobile video vans by the agricultural extension department could be encouraged as is the case in the Agricultural Services Support Program (ASSP) that commences in July 2005;
- Public radio adjusting her programmes to include entertainment to lure listenership that has been on the decline;
- Development programmes made by the Farmers' Education and Publicity Unit (FEPU) of the Ministry of Agriculture is in position to hire them out to willing district councils, NGOs and any other development partners in collaboration;
- The Tanzania Communications Regulatory Authority (TCRA) is proposing to decrease the licensing fees for community radios and TVs to US\$ 200-300 only down from over US\$ 2500. This is likely to induce mushrooming of community radios/TVs.

7.3 The Way Forward

While the outputs of this study will form basis for the possibility of further studies and consultancies that could lead to recommending more intensive establishment and use of community radio and TV, the Tanzanian community will share and use the study findings and recommendations to further develop the policy framework for radio and television in the country. It will particularly be useful for uptake by the Tanzania Communications Regulatory Authority (TCRA) which is currently undertaking reviews on the regulatory policies (including community radio/TV) for broadcasting.

8. Conclusions

From this study, the following can be concluded:

- The current policy and regulation framework for broadcasting in Tanzania is conducive and welcoming thus giving opportunity for introduction and development of community radio and television. The current negotiations between the regulators and the broadcasters for reduction of licensing fees shows the commitment from the government side for wider accessibility to broadcasting for all;

- The local radio is widespread reaching all communities. This deep radio penetration has created a good base and condition for information to get there although the challenge remains for the availability of sufficient relevant local content;
- The Local Government Reforms have opened up opportunities such that radio and TV can be localized and the district councils could be financially supporting and owning them;
- The financing (in terms of equipment, buildings, etc.) of local radio radio/TV as well as the availability of skilled manpower at local levels are the biggest limitations