BASELINE STUDY ON THE CULTURE SECTOR IN ZIMBABWE

Culture Fund Research Programme supported by the Swedish International Development Agency

March, 2009

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Deed of Trust: MA/2006/08

Culture Fund Research Programme supported by
the Swedish International Development Agency

ISBN: 978-0-7974-5188-9

TABLE OF CONTENTS

LIST OF FIGURES

LIST OF TABLES

Culture Fund Research Programme supported by the Swedish International Development Agency

ACKNOWLEDGEMENTS

This baseline study was commissioned by the Culture Fund of Zimbabwe Trust and was undertaken by Jimat Development Consultants.

The Culture Fund and the consultants acknowledge the invaluable guidance and support provided by the National Arts Council of Zimbabwe staff across all provinces and levels. We are also particularly grateful to the immense support received from various arts associations, arts practitioners and other stakeholders in the public, donor and private sectors. Much gratitude is extended to artists across all sub-sectors for taking time to respond to our questions.

We have attempted to verify information collected from the various sources. If omissions are discovered, we would appreciate your assistance in pointing them out and providing more information to strengthen future similar researches by the Culture Fund. The views contained in this report are entirely those of the consultants and do not necessarily reflect those of the Culture Fund of Zimbabwe Trust.

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Board members and staff of the Culture Fund are acknowledged for their contribution, overseeing and coordinating role from the process of identifying consultants, validation process with stakeholders, to production and dissemination of report notably Professor Gambahaya who edited the report as well as the following staff for their contribution Farai Mpfunya, Executive Director , Chipo Muvezwa, Programmes Officer, and Olga Muhwati, Projects Officer.

LIST OF ACRONYMS

AIDS	Acquired Immune Deficiency Syndrome
CBO	Community Based Organisation
CD	Compact Disc
CHIPAWO	Children's Performing Arts Workshops
CIDA	Canadian International Development Agency
DANIDA	Danish International Development Agency
DSTV	Digital Satellite Television
FGD	Focus Group Discussion
GDP	Gross Domestic Product
HIFA	Harare International Festival of the Arts
HIV	Human Immunodeficiency Virus
IIFF	International Images Film Festival
NACZ	National Arts Council of Zimbabwe
NGO	Non-Governmental Organisation
NMMZ	National Museums and Monuments of Zimbabwe
Sida	Swedish International Development Agency
SPSS	Statistical Package for Social Scientists
SPW	Students Partnership Worldwide
UNESCO	United Nations Educational, Scientific and Cultural Organisation
ZESA	Zimbabwe Electricity Supply Authority
ZIFFT	Zimbabwe International Film Festival Trust
ZIFTESSA	Zimbabwe Film and Television School of Southern Africa
ZIMRA	Zimbabwe Revenue Authority
ZIMSEC	Zimbabwe School Examinations Council
ZTA	Zimbabwe Tourism Authority
ZUM	Zimbabwe Union of Musician

EXECUTIVE SUMMARY

The baseline study was commissioned by the Culture Fund of Zimbabwe Trust in order to identify and collect data on the status of the culture sector in Zimbabwe for the purpose of benchmarking and informing sector programming, monitoring and evaluation of interventions. The research was made possible with the assistance of the Swedish International Development Agency (Sida).

The study used a combination of qualitative and quantitative methods to collect data that best portrays the baseline scenario of the culture sector in Zimbabwe. Key informant interviews and focus group discussions were used to collect qualitative data, while secondary sources and individual questionnaires were administered on randomly selected strata of the sector. In all cases, respondents were identified by sub-sector and across levels (national, provincial, district and grassroots). The findings of this baseline study are based on a sample covering all the ten provinces of Zimbabwe.

Key findings of the study indicate that the culture sector in Zimbabwe has immense potential to contribute to livelihoods and the national income. Sector competitiveness and growth have been constrained by a number of factors. At national level, the sector is mainly constrained by a weak local market resulting from low disposable incomes to expend on cultural products, coupled with an equally depressed international market as a result of a negative perception of the country by international tourists.

Government financial and technical support of the culture sector has been very limited in the past few years, with the hyper-inflationary macroeconomic effects and massive brain-drain in the sector further increasing the need for additional resources to support the growth and development of the sector. Unfavourable policies have also stifled creativity, especially in the performing arts and the media sub-sectors. The export policy, characterised by a high duty on cultural products, has also shifted markets in favour of regional competitors.

The findings also indicate a limited skills base and shortages in specialised roles in the culture sector due to a massive emigration to regional and international destinations by artists and other key players in the sector. Training capacity and staff and artist retention strategies have not been adequately structured to meet industry challenges to enhance growth and development. Weak associations and ineffective information communication systems between artists and promoters were reported, as well as lack of effective monitoring and coordination of interventions, marketing strategy and information sharing within the sector.

The competitiveness of the culture sector has been declining due to low level of political commitment to allocate meaningful resources to the development of the culture sector, coupled with the lack of effective engagement of the private sector and donor community. A poor pricing system for cultural products which is less responsive to inflation has also added to the challenges in this sector.

At a global level, there is limited access by local artists to markets due to poor connectivity and lack of knowledge of the internet and other business communication tools relevant in an increasingly globalised market. While Zimbabwean art is recognised globally, the brand strength and visibility still need to be improved to enhance global market competitiveness. The local market is facing strong challenge from Chinese visual art products that are lowly priced. Zimbabwe could benefit from selling those products only unique to Zimbabwe, for example, Great Zimbabwe and Khami Ruins.

Capacity development at sector level is recommended in order to enhance viability, competitiveness and sustainability of the industry. The research proposes that the Culture Fund takes the responsibility of coordinating recommended interventions. The researchers were of the view that Government must demonstrate the political will to prioritise and commit resources for the development of the sector.

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EXECUTIVE SUMMARY(continued)

In order to promote and support literary arts, the research recommends that educational curricula be reviewed to enhance the development of creative talent and a culture of reading. Budding writers associations must be prioritised in order to give young writers the space for skills development and networking. In pursuit of the promotion of visual arts, there is need to harness and retain experienced artists, advocate and lobby for institutional support, and enable artists to access and establish a presence on the internet for purposes of marketing visual arts products.

In the music industry, the strengthening of support institutions is necessary in order to ensure that the artists have the necessary networks to record, publish, market and distribute their music. Legislation must be enforced to curb anti-piracy and copyright infringement. There is also a need to expose local artists to regional and international festivals for benchmarking and creating business networks.
The film industry in Zimbabwe has great potential to develop beyond its current state. With film makers in developed countries always looking for locations for producing films, the researchers recommend that a market study be undertaken to assess the potential and develop strategies for marketing Zimbabwe's natural endowments. It is further recommended that Zimbabwe must endeavor to focus resources on the production of major film alongside the short films in order to enter the lucrative global cinema arena. Locally, the stakeholders recommended the establishment of an independent broadcasting and telecommunications regulatory body to enhance the competitiveness of the industry and improve the quality of television programming. This could be facilitated through the repeal of the Broadcasting Services Act (2001) to allow the entry of new players in community and commercial television.

With reference to the cultural heritage sub-sector, it is necessary to promote interest in national heritage early in schools and incorporate it in the educational curricula. Cultural heritage could be promoted in several ways, including through support of such events as National Heroes Day commemoration, national and provincial biras, and the performance of the national anthem. Local languages should be recognised through the media and educational system. Cultural tourism could be greatly promoted through studies that can determine the inventory of heritage sites, upgrading or restoring and marketing these.

The media plays a very important role in communicating culture. The media could play a critical role in supporting initiatives to market products of the culture sector, e.g., festivals broadcast on television, funding television programmes and documentaries related to the sector. Culture Fund could also consider the possibility of including the range of available media in reaching artists and monitoring progress after funding. In order to equip media practitioners with capacity to report on culture, there is need to facilitate training workshops for journalists to improve their contribution to the growth and development of the culture sector.

The research observed that the culture sector has been adversely affected by the HIV and AIDS pandemic. It is recommended that HIV and AIDS training be mainstreamed in the capacity building strategies for all the sub-sectors within the culture sector.

The study established the significance of the programming and monitoring function that Culture Fund could play. It is recommended that a database of grant beneficiaries within the various sub-sectors be established to improve monitoring of growth and development. Key stakeholders must be trained in monitoring and evaluation.

Future research could focus on policy frameworks, educational and training institutions, and the financing of the culture sector. Continuous research effort is key in keeping the culture sector informed by the unique local realities while taking advantage of regional and international opportunities.

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1. INTRODUCTION

The Culture Fund of Zimbabwe Trust (Culture Fund) was established in 2006 with a mandate of contributing to the growth and development of the culture sector through provision of funding and technical support to cultural practitioners, institutions and activities. Through partnerships and synergies with various stakeholders, the Culture Fund works to address the challenge of inconsistent funding to the culture sector in Zimbabwe.

The culture sector in Zimbabwe has an enormous potential for contribution to both national and household income from local and export sale of various goods and services. In spite of Zimbabwe's comparative advantage within the Southern African region, the sector is weakly coordinated and artists across all the key sub-sectors generally lack adequate funding, sufficient markets and technical resources to fully exploit this potential.

1.1. PURPOSE OF THE BASELINE STUDY

The purpose of this baseline study is to assist in objective strategic planning, monitoring and evaluation of interventions in the culture sector in Zimbabwe. The commissioning of this report is based on several gaps and issues identified within the culture sector:

1. The exact size, structure and composition of the culture sector are not known. There is great need to gather and consolidate information on different sub-sectors of the culture sector in Zimbabwe and establish whether there is an industry to be quantified.
2. The culture sector has mainly been treated as a form of entertainment without any meaningful contribution to economic prosperity. There is no proper documentation on its importance in Zimbabwe. Arguments in support of the existence of an industry are mainly anecdotal.
3. The lack of proper documentation on the importance of the sector has not convinced Government and other stakeholders to release substantial funds for the industry's development. It is therefore vital that a study on the economic importance of the culture sector be conducted in order to come up with better policies and legislation to support an industry.
4. There is also clear evidence that most artists in Zimbabwe are not producing at optimal due to lack of financial resources. The average Zimbabwean artist is marginalised and, though talented, cannot afford to produce high quality arts and cultural products.
5. The culture sector sustains the livelihoods of many Zimbabweans but its contribution is not included in the calculation of Gross Domestic Product (GDP) figures of Zimbabwe. The research provides a case for inclusion of the arts and culture sector in the calculation of GDP figures.
6. The baseline study, besides providing an estimate of the contribution of the culture sector, makes recommendations to the responsible authorities, to be more attentive in providing the needed resources for the cultural agents and artists for the production of marketable products in order to realise the full potential of this fast growing sector.

1.2. SPECIFIC OBJECTIVES

The study focuses on the following specific objectives:

1. Identify the culture sector, its activities and major beneficiaries.
2. Define the size and structure of the culture sector.
3. Gather and consolidate information on different sub-sectors that make up the culture sector in Zimbabwe.
4. Assess the performance of the culture sector in relation to employment and incomes in both local and foreign terms.

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5. Compare performance of the sector to other important sectors whose contribution is more clearly defined.
6. Determine the current contribution of the culture sector and the arts and cultural industries to the Zimbabwean economy.
7. Define the role of arts practitioners, funders, arts organisations and associations in promoting the culture sector.
8. Develop baseline indicators on the culture sector.
9. Identify gaps and recommend better policies for the growth of the culture sector.
10. Make recommendations on what needs to be done in order to realise the full potential of the culture sector.

1.3. BACKGROUND ON THE CULTURE SECTOR IN ZIMBABWE

The culture sector in Zimbabwe is defined as the summative total of activities in production, distribution and promotion of goods and services that define the national culture; where "culture", according to UNESCO[1], refers to "the totality of a people's way of life, the whole complex of distinctive spiritual, material, intellectual and emotional features that characterise a society or social group, and includes not only arts and letters, but also modes of life, the fundamental rights of the human being, value systems, traditions and beliefs".

[1]1982 UNESCO World Conference on Cultural Policies.

In view of this definition, the following represent the sub-sectors that constitute the culture sector of Zimbabwe, as used in this baseline study:

1. Performing arts
2. Visual arts
3. Film and video
4. Music
5. Cultural heritage
6. Literary arts
7. Media

Across the sector, the key stakeholders and organisations of the sector are summarised by the charts below:

Table 1: Key stakeholders in the culture sector

Stakeholder	Key players/Institutions
Artists	Creative artists: Writers/script writers, choreographers, producers, designers. Performing artists: dancers, actors, poets, singers.
Arts promoters	Promoters: Event promoters, festival organisers, awards organisers. Supporting industries: producers, recording companies, retailers Financial promoters: Donors, private companies, individuals.
Marketers and distributors	Galleries, craft villages, exhibitors, street vendors, media, distributing companies.
Regulating authorities	Government regulating institutions like the National Arts Council, Ministry of Education Sport and Culture, National Museums and Monuments, Zimbabwe Revenue Authority, ZimTrade.
Technical/Training institutions	Universities, colleges, training institutions, private companies and other institutions providing training workshops, informal training.

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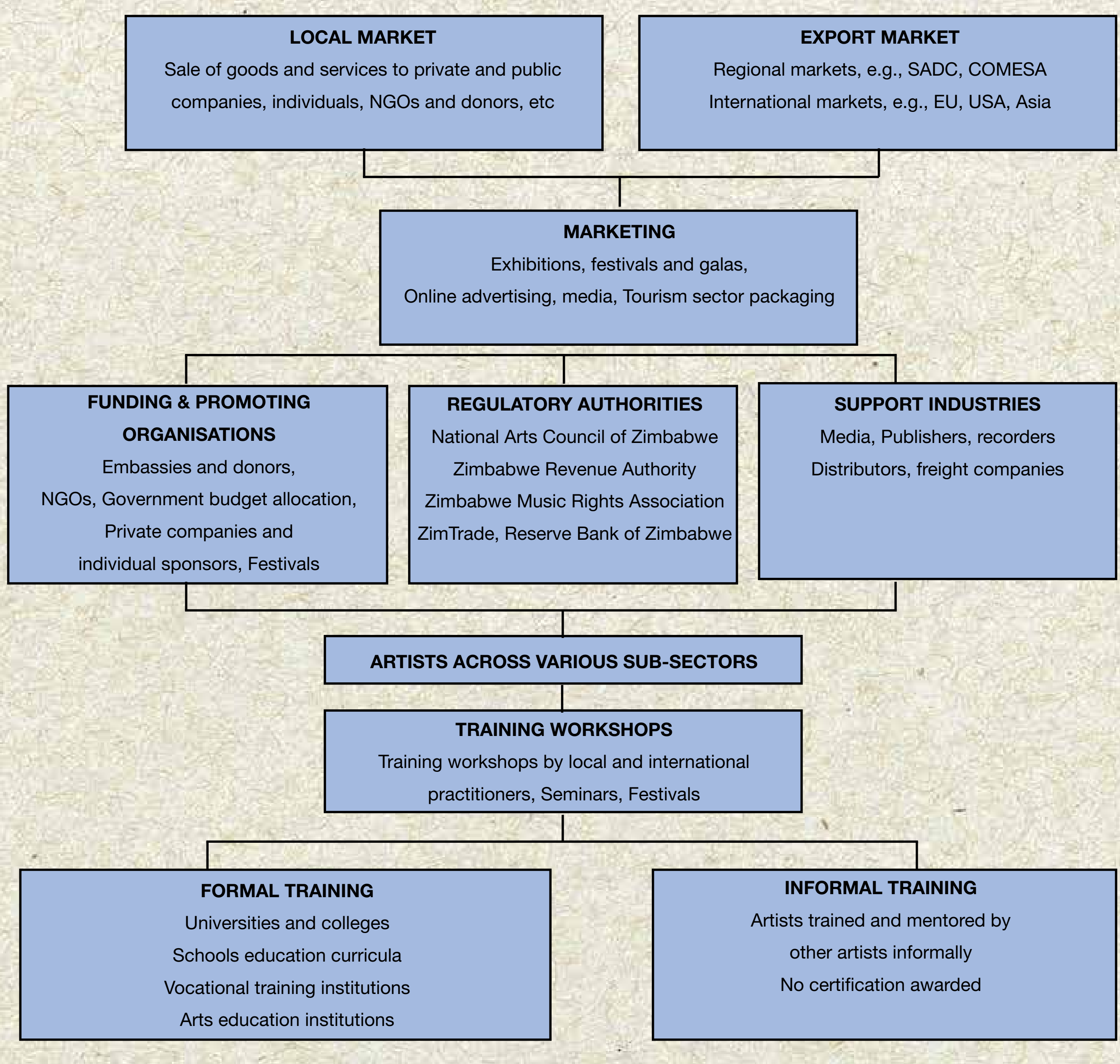
ORGANISATION OF CULTURE SECTOR



1.3.1. GENERAL CHARACTERISTICS OF THE CULTURE SECTOR

At project baseline, the culture sector in Zimbabwe is characterised by the following features:

1. Composed predominantly of individuals and small enterprises.
2. Generally low incomes for most artists at grassroots level; moderate to high incomes for internationally established artists.
3. Management skills weak or lacking for most establishments.
4. Training predominantly informal.
5. Constrained access to financial resources and high reliance on limited private company and donor funding support.
6. Highest returns per dollar invested made by middle men due to weak contract negotiation and business management skills by most artists.
7. Wide gender disparities exist in the sector. The proportion of women in the sector is low but growing, as is their financial and economic contributions at national levels.

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8. Disabled people participate within the various sub-sectors in different capacities. Predominantly, they are within the visual, music, literary and performing arts sub-sectors.
9. The culture sector is guided by a policy framework, although specific knowledge and awareness of policy is low.
10. The sector depends on and contributes to the growth in the tourism industry.

The status of the baseline scenario described above is influenced by a number of factors (political, economic, social, technological, environmental and legal). To appreciate the baseline status, the table given below summarises key considerations highlighted by various stakeholders interviewed:

Determinant Factors	Baseline Scenario
Political and Legal	1. An uncertain political environment is reducing receipts for the tourism industry, and by translation, volume of sales in the culture sector. 2. Restrictive government legislation is reducing opportunities for artistic creativity and expression. 3. Low government investment in development of culture sector.
Socio-economic	1. Hyper-inflation (231 million %) is reducing disposable income available to expend on products from the culture sector. 2. High staff turnover and low resource capacity in various culture sector institutions adversely affecting operations and contribution to sector development. 3. High import and export duty reduces the sector's regional competitiveness. 4. Competition with cheaper imported (e.g., Chinese) products, especially in the visual arts sub-sector.
Technological	1. Frequent power outages disrupt activities related to performance (performing arts, music) and production (weld art, printing, photography, publishing, etc.). 2. Internet access is still low (10.9% of the population accessed the internet in 2008), thus constraining international market knowledge. Computer skills are also limited within sector. 3. The unrestricted nature of the internet allows access to foreign based Zimbabwean papers from within Zimbabwe. 4. Limited local production of various equipment used in the culture sector. Imported equipment is relatively expensive if purchased locally.
Environmental	1. Harvesting of natural resources is not being done in a sustainable manner. Forests are declining at a rate of 1.6% per year, mainly due to firewood sales, reeds over-harvesting for basket making, and tree felling for wood carving. Constrained enforcement of the Environment Act has led to falling availability of raw materials for the sector. 2. Zimbabwe is well endowed with scenic beauty which attracts tourism and directly influences earnings for the culture sector.

1.3.2. ZIMBABWE'S COMPARATIVE ADVANTAGE IN THE CULTURE SECTOR

Zimbabwe is a country with immense potential for a vibrant and economically lucrative culture sector. Its competitive advantage is a function of the following factors:

1. Endowment with scenic and natural beauty attractive for tourism. Tourism provides a lucrative market for various cultural goods and services.
2. Although declining in some parts, Zimbabwe has invested reasonably in infrastructure for the culture sector, e.g. museums and galleries, theatres, libraries, etc.
3. Served by a network of transport and communication, making access to cultural heritage sites and marketing of cultural products feasible.
4. Unique art, e.g., the Shona stone sculpture is globally recognised as Zimbabwean art.
5. Zimbabwe is highly diverse ethnically with 17 different languages spoken. This diversity provides a wide variety of cultural products from which a vibrant cultural tourism sub-sector could be developed.

1.3.3. MARKET FOR ZIMBABWE'S CULTURAL PRODUCTS

At project baseline, 71% of artists are marketing goods and services within the Zimbabwean market, 26.2% are accessing both local and foreign markets, while 2.6% rely on foreign markets. On this basis, lack of adequate markets for the consumption of culture sector products emerged as a key limitation to sector performance, sustainability and vibrancy.

1. LOCAL MARKET

The level of consumption of cultural goods and services is variable across sub-sectors, with performing arts being the most important. In the visual arts, preference is for utility art (baskets, wooden stools, knobkerries, etc) ahead of decorative art (painting, sculptures, etc). Across sub-sectors, the mean volume sold per artist is generally low, thus keeping depressed the contribution of the culture sector to most arts based livelihoods and the national economy.

There are a number of factors constraining the local culture market. Some of the factors common across sub-sectors are:

- Low disposable incomes reducing expenditure on cultural products.
- Lack of a holistic and well coordinated strategy for marketing local cultural products.
- Poor arts management systems and limited access to market information.
- Piracy and infringement of copyrights and intellectual property.
- Increased competition from cheaper imported products.
- Low level of appreciation of local cultural products within the local market.

2. EXPORT MARKET

The highest value of earnings for the culture sector was from consumers other than local Zimbabweans, predominantly sourced through the tourism sector. Tourism contributed an approximate US$365 million in 2007[2] (about1.8%) to the Gross Domestic Product of Zimbabwe. Of this, the direct and indirect contribution of the various culture sub-sectors, particularly the visual arts and cultural tourism, is estimated at 25%-35% ($90-127million). A decline in tourist receipts (due to, e.g., political uncertainty, xenophobic attacks in South Africa) often depresses earnings to the culture sector, owing to this interconnectedness.

[2]*Zimbabwe Tourism Authority. 2007. Tourism Trends and Statistics. 2007 Annual Report.*

Other factors limiting export market earnings include:

- The general economic and political uncertainty and constraints facing Zimbabwe place the country as an unfavourable destination for tourism.
- Global economic recession is reducing tourist volumes globally. Falling volumes for South Africa (e.g. due to xenophobic attacks) have reduced volumes received by Zimbabwe, since Zimbabwe relies on South African operated package tours for its own tourism industry.
- High duty on imports (inputs into the sector) and exports (products) reducing sector competitiveness.

The main regional markets include South Africa, Botswana, Zambia, Mozambique and DRC. International markets include the USA, UK and Ireland, Germany, Japan, China, South Korea and Australia. Zimbabwe is a net importer of cultural products. The major source regions of cultural products are South Africa, USA and China.

Imports are in the following order:

- Film And Video
- Music
- Media
- Performing Arts
- Visual Arts
- Literary Arts
- Cultural Heritage

Zimbabwe is a net importer in the culture sector, with a higher proportion of these products falling within the film, music and performing arts sub-sectors. High import: export ratio implies a challenge in maintenance and interest in locally made cultural products.

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2. METHODOLOGY

Data requirements for the baseline comprised both quantitative (incomes, revenue, size of sub sectors, etc) and qualitative data (sector dynamics, awareness, knowledge, attitudes, practices, key challenges, etc). Data was collected at three levels: individual artist, organisational and institutional levels across identified sub-sectors. An initial key stakeholders mapping exercise identified the study sample, and specific tools to solicit data were then developed, guided by the objectives and scope of the baseline study.

The baseline study sample was determined from across the ten provinces of Zimbabwe. Specific districts are indicated below:

Province	Districts Sampled
Mashonaland West	Chinhoyi
Mashonaland Central	Bindura
Mashonaland East	Murehwa, Marondera
Midlands	Gweru
Masvingo	Masvingo
Manicaland	Mutare
Matabeleland North	Victoria Falls, Hwange
Matabeleland South	Gwanda
Harare	
Bulawayo	

2.1. DATA COLLECTION TOOLS

A cross design of qualitative and quantitative methods and tools for primary and secondary data collection and analysis were developed. Different tools complemented, triangulated and verified data, thus enhancing quality of data collected.

2.1.1. INDIVIDUAL QUESTIONNAIRE

251 randomly selected semi-structured interviews were held with stakeholders in the six culture sub-sectors within the scope of this baseline study. The study sample was diverse and covered artists, arts promoters and managers. Table 2 details the sample size and segregates data by gender.

Table 2: Respondents interviewed by gender

	Frequency	%	Valid %	Cumulative %
Male	188	72.0	72.3	72.3
Female	72	27.6	27.7	100.0
Total	260	99.6	100.0	

2.1.2. KEY INFORMANT INTERVIEWS

At the inception phase, stakeholder mapping was conducted to identify suitable individuals and institutions from which expert views and data could be extracted. Key informants were identified at sub-sector, district and national levels. Key informants included staff in donor organisations, NGOs, government departments, arts institutions, private companies and training colleges. Respondents included art group managers, editors and publishers, film directors and actors. A semi-structured interview guide was used to focus these discussions.

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2.1.3. FOCUS GROUP DISCUSSIONS

Focus group discussions were held with artists in various sub-sectors. Each focus group discussion (FGD) was composed of between six and 12 participants, a number large enough to generate a lively discussion but small enough to manage the discussion within reasonable time and scope. FGDs were guided by a list of key topics to explore in greater depth key issues relevant in understanding the baseline scenario. Artists' level and sub-sector specific responses were captured as such.

2.1.4. DOCUMENTARY REVIEW AND ANALYSIS

Secondary data available from various key institutions was reviewed and analysed. Baseline indicators were collected based on a matrix developed to capture data relevant within the scope of this study. Reports and research publications from stakeholder institutions were reviewed and relevant data extracted.

2.1.5. CASE STUDIES

Specific details providing a personal or organisational account on experiences were recorded and inserted as case studies. Case studies are important for qualitative data, and accounts so collected could be compared at evaluation to get proxies on project impact in terms of beneficiary satisfaction and determination in benefits accrued as a result of the project.

2.2. TRAINING AND FIELDWORK

Research assistants were oriented on the scope of the project and trained on data collection to ensure consistency in the data collection process. Translation and pre-testing of the questionnaire were done. To control quality, individual questionnaires were checked daily by the consultant and any unclear details clarified.

2.3. DATA ANALYSIS

Data coding, entry and cleaning were undertaken by trained clerks. Analysis of household questionnaire data was performed on Statistical Package for Social Scientists (SPSS), while qualitative data was analysed through constant comparative technique that groups like data to come up with major themes. Issues that came up frequently were highlighted as emerging issues.

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2.4. LIMITATIONS OF THE STUDY

The baseline study was constrained by the following factors:

1. The study focused on ten broad objectives. Given resource constraints, the level of depth of coverage for all issues under study was compromised. Recommendations for further research are highlighted in this report.
2. Statistical data in key institutions in the culture sector were unavailable or outdated. Institutions indicated resource and capacity constraints in maintaining accurate records. The latest reports by the Central Statistical Office are based on the 2002 census.
3. The study was conducted during the period towards the presidential runoff elections. Most respondents were hesitant and sensitive to being interviewed individually or in focus groups. Moreover, new councillors had not yet been sworn into office, thus restricting entry into wards, especially in rural areas. Government regulations on information management reduced access to data required for the study.
4. High staff turnover in some of the sampled organisations meant that the project team interviewed staff with limited experience in working within the sector. In some cases, interviews had to be conducted with junior staff.
5. The hyper-inflationary and strained economic environment affected frequency of incomes and respondent capacity to recall incomes or revenue, and by translation, the calculation of the size and contribution of the sector to the national Gross Domestic Product.
6. The mobility of artists within and beyond Zimbabwe, and lack of clarity in records held on whether artists have migrated or are still resident in Zimbabwe, may have led to an under or over-estimation of totals.

In spite of the challenges faced in conducting the baseline study, we are confident that the findings present the most likely baseline scenario. Tools were cross-triangulating and data validation was ensured as such. The report thus provides reliable information to inform the programme management function.

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3. FINDINGS

This section details the qualitative and quantitative findings that reflect the baseline scenario of the culture sector in Zimbabwe. The findings have been organised into six sections. Section 1 summarises the key demographic and sector knowledge characteristics defining the culture sector. Section 2 focuses on findings by sub-sector while the third (Section 3) maps the economic contribution of the culture sector. Section 4 covers the social issues relating to the culture sector (gender, youths and community development) and Section 5 is on arts education. Section 6 summarises issues related to financing arrangements available for the culture sector and the role of the Culture Fund.

3.1. CHARACTERISTICS OF RESPONDENTS AND SECTOR DATA

This section focuses on the demographic and other general indicators that guide the interpretation and understanding of the baseline scenario for the culture sector in Zimbabwe. Key characteristics analysed include age, gender, income, education and training, marketing, membership to associations, and awareness of relevant sector policies and the Culture Fund of Zimbabwe Trust.

3.1.1. GENDER OF RESPONDENTS

72% of the respondents interviewed were males, with the remainder 28% being female. The baseline scenario is characterised by a higher proportion of males compared to females in the culture sector. However, within sub-sectors there were notable disparities in gender composition as the following table shows:

Table 3: Distribution of respondents by gender across sub-sectors

	What Specific Sub-Sector Are You In?								Total
	Film And Video	Performing Arts	Visual Arts	Literary Arts	Cultural Heritage	Media	Music	Other	
Female	5 33.3%	21 27.3%	22 23.7%	4 28.6%	1 25.0%	1 25.0%	13 28.3%	5 83.3%	72 27.8%
Male	10 66.7%	56 72.7%	71 76.3%	10 71.4%	3 75.0%	3 75.0%	33 71.7%	1 16.7%	187 72.2%
Total	15 100.0%	77 100.0%	93 100.0%	14 100.0%	4 100.0%	4 100.0%	46 100.0%	6 100.0%	259 100.0%

The highest proportion of female relative to male artists is in the film sub-sector (33%), and least in the visual arts sub-sector (24%). Within the visual arts sub-sector, females were concentrated in such activities as basketry, batik, crochet art and pottery while male counterparts focused on wood and stone sculptures, weld art and painting. This distribution could be explained by gender specific traditional roles in which men and women produced items to perform different household and community tasks.

Within the music sub-sector the highest ratio of female artists in leading roles was in the gospel and choral music genres. Across all genres, females played a larger role as backing vocals and dancers. Women were in leadership in less than 20% of music groups.

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3.1.2. AGE OF RESPONDENTS

The culture sector employs artists across all age groups. Within each sub-sector, there is a tendency for higher concentration around a specific age group. In the music sub-sector, there are fewer (6.1%) artists above 50 years of age. This is related to the influence of generation specific social stereotypes about the music sub-sector.

Table 4: Distribution of artists by age and gender: Music

			Gender		
			Male	**Female**	**Total**
Music	**What is your age?**	>50	6.1%	.0%	4.3%
		35-49	18.2%	15.4%	17.4%
		25-34	51.5%	46.2%	50.0%
		Under 25	24.2%	38.5%	28.3%
			100.0%	100.0%	100.0%

Although the proportions of men and women in the under-25 year age group were relatively balanced, fewer women tended to continue in the visual arts beyond 25 years. In the 35-49 year age group, women tended to dominate in proportions. A higher proportion of middle aged and elderly women are involved in forms of art such as pottery and crochet art, which to a large extent is related to their gender specific roles in the household, e.g., collecting water and decorating the households. Promoting interventions in the categories in which women have a comparative advantage could thus enhance the benefit of their engagement in the sub-sector.

Table 5: Distribution of artists by age and gender: Visual arts

			Gender		
			Male	**Female**	**Total**
Visual arts	**What is your age?**	>50	8.5%	4.5%	7.5%
		35-49	19.7%	45.5%	25.8%
		25-34	50.7%	31.8%	46.2%
		Under 25	21.1%	18.2%	20.4%
			100.0%	100.0%	100.0%

In the literary arts sub-sector, the higher proportion of males in the below 25 years age group is attributed to interest in poetry (often performed) by younger men compared to their female counterparts. Key informants attributed the relatively significant presence of women in the 35-49 years age group to the role of the education system and differences in hobbies by gender. For the younger generation, more opportunities for careers limit the hobby base away from reading or writing.

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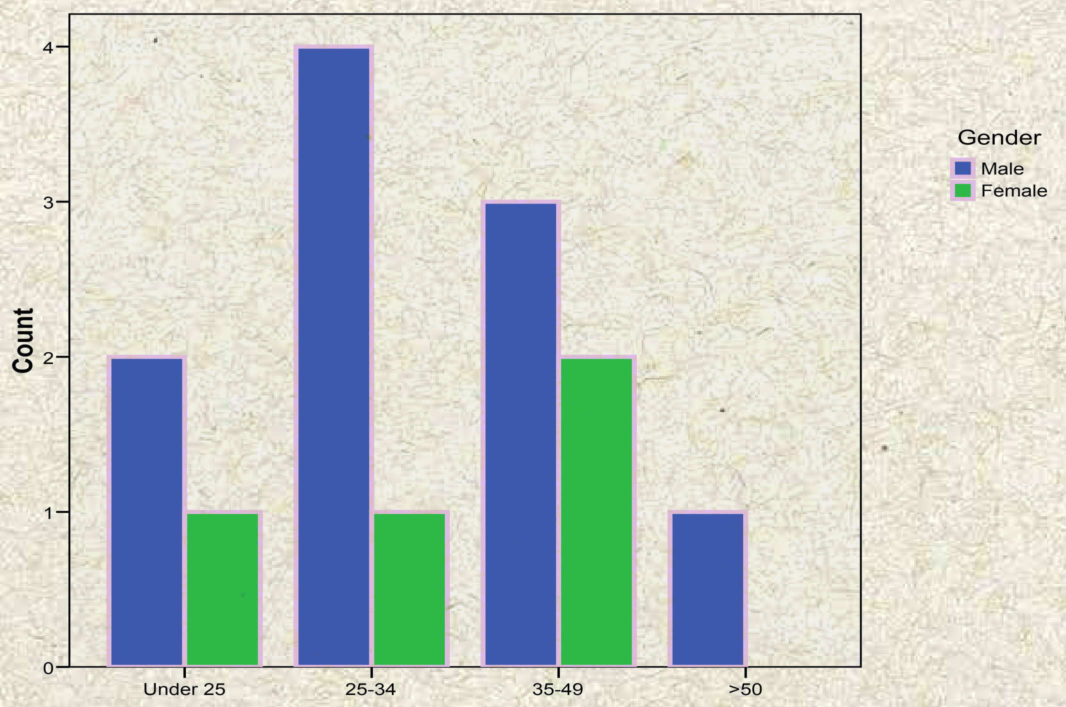
Figure 1: Distribution of artists by age across sub-sectors: Literary arts

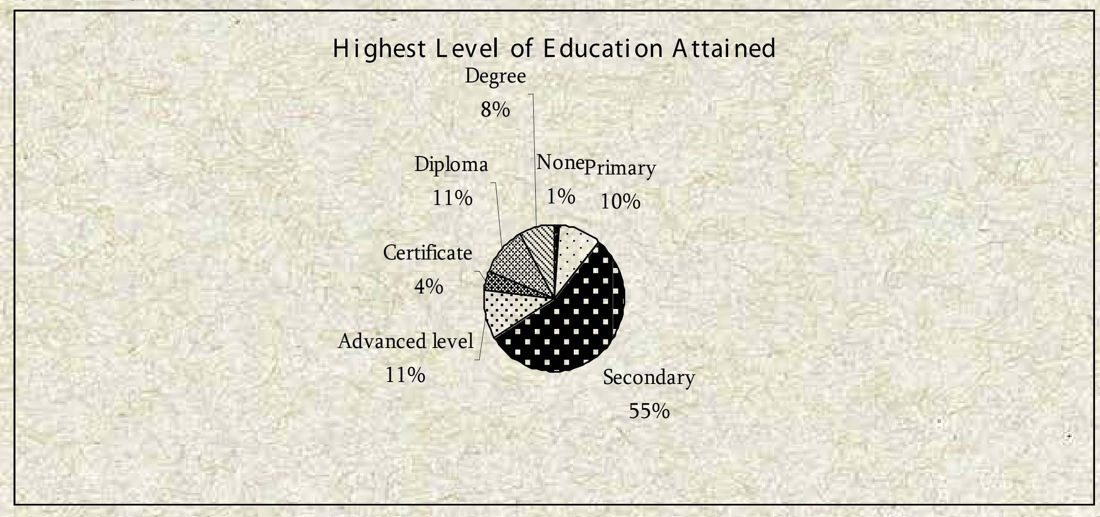


The performing arts sub-sector was predominantly male dominated across all age groups except the below 25 years age group (29% of all women in the performing arts versus 9% for men). Respondents in this category indicated that when most women get married (at age 25 and above), they are unable to get time away from home. Men above 25 tended to view this sector more seriously as an income source.

3.1.3. EDUCATION

In terms of education, the general attitude among artists is that they are perceived by the community as uneducated, or people who had low educational potential to fit into other sectors of the economy. Contrary to these perceptions, 55% of all artists interviewed had attended secondary school while 8% had managed to study up to degree level. The low level of practitioners with higher degrees (e.g., Masters) in the culture sector has presented a specialist skills gap especially in conducting research, critical analysis and institutional capacity development required to inform sectoral decisions and expand the sector. As indicated in the arts education section of this report, the Government has made significant strides in improving the standard and level of arts education.

Figure 2: Highest level of education attained



All respondents in the film sub-sector have attained at least secondary education while some in the visual arts had not attained any level of formal education. A significant proportion of respondents with primary education were in the performing arts (33% and visual arts (54%). The proportion of respondents who attained advanced or higher level across all sub-sectors was 34%.
Table 6 gives the frequency per education level across the various sub-sectors.

Table 6: Highest level of education attained by sub-sector

What level of education did you attain?								
	None	**Primary**	**Secondary**	**Advanced Level**	**Certificate**	**Diploma**	**Degree**	**Total**
Film			7	2		3	3	15
Performing Arts		8	45	6	4	9	3	75
Visual Arts	2	13	52	5	5	7	3	87
Literary Arts			2	6		1	5	14
Cultural Heritage		1	1	1		1		4
Media		1				3		4
Music		1	31	5	2	4	2	45
Other			2	1			3	6
Total	2	24	140	26	11	28	19	250

3.1.4. TRAINING

The execution of tasks (production, presentation, marketing, distribution) in the culture sector depends largely on the training component (formal and informal) more than level of education attained. Across sub-sectors, an analysis of skills available within the culture sector is indicative of limited training on soft skills as contract negotiation, business management, image management and branding.

38% of artists interviewed were trained formally while a much larger - 61% were trained informally. The nature of training tended to have a bearing on the business management aspects of the culture sector. The main perception held was that formally trained artists tended to be more professional in approach, while informally trained artists had challenges in pricing their goods and services and mainly worked for passion than income. The latter was viewed as more vulnerable to exploitation within and beyond the culture sector. However, there was no relationship established between levels of income and training received by artists.

60% of respondents had received some form of formal qualification related to the culture sector.

Table 7: Type of training received

		Frequency	**%**	**Valid %**	**Cumulative %**
	Formally	90	34.5	38.3	38.3
	Informally	144	55.2	61.3	99.6
	Other	1	.4	.4	100.0
	Total	235	90.0	100.0	
Missing	System	26	10.0		
Total	261	100.0			

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The proportion of formally trained arts practitioners was highest in the media (67%) and film sub-sectors (57%), and least in the visual arts (25%), where sculpturing was often learned as a family or community skill, and performing arts (26%) sub-sectors. Table 8 below provides a summary of the form of training received by artists across the culture sub-sectors.

Table 8: Type of training by sub-sector

		How where you trained for this work?			
		Formally	Informally	Other	Total
What specific sub-sector are you in?	Film	8 57.1%	6 42.9%	0 .0%	14 100.0%
	Performing Arts	26 38.8%	41 61.2%	0 .0%	67 100.0%
	Visual Arts	25 27.5%	66 72.5%	0 .0%	91 100.0%
	Literary Arts	5 45.5%	6 54.5%	0 .0%	11 100.0%
	Cultural Heritage	1 33.3%	2 66.7%	0 .0%	3 100.0%
	Media	2 66.7%	1 33.3%	0 .0%	3 100.0%
	Music	18 45.0%	22 55.0%	0 .0%	40 100.0%
	Other	5 83.3%	0 .0%	1 16.7%	6 100.0%
Total		90 38.3%	144 61.3%	1 .4%	235 100.0%

The type of training received by arts practitioners had an influence on the skills available for managing arts at different levels. Formally trained artists tended to exhibit stronger business approach and acumen relative to their informally trained counterparts. It should be noted, however, that arts management is a key area for capacity building relevant across all artist levels.

The level of formality in training influenced the amount of labour input in the sub-sector. Formally trained artists were more likely to be involved on a full-time basis in the sub-sector than the informally trained practitioners. There was no correlation between the level of training and nature of employment with incomes earned.

The following chart shows the nature of employment (full-time and part time) across sub-sectors.

Figure 3: Nature of employment by sub-sector

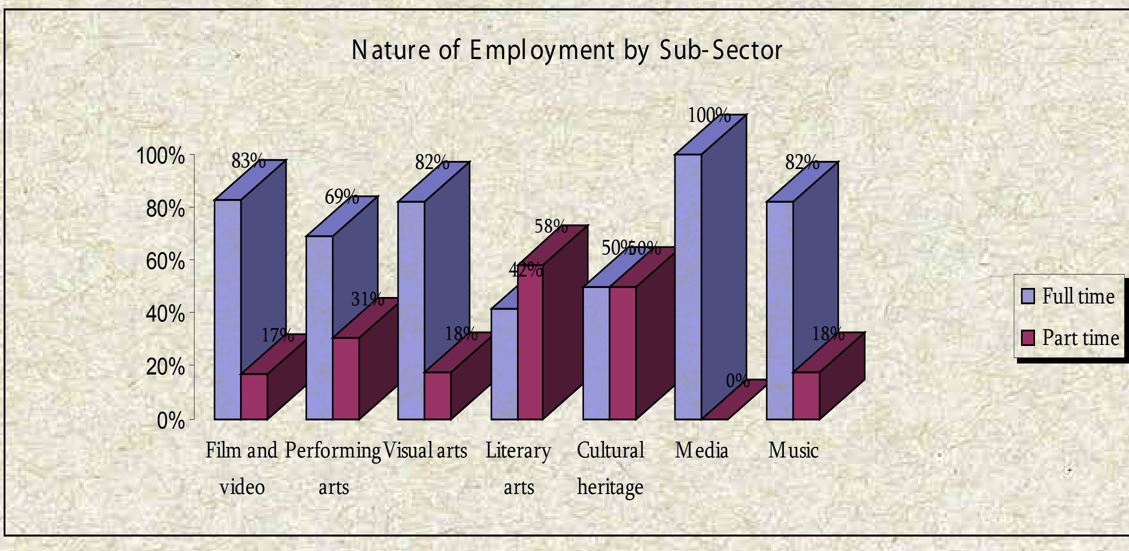

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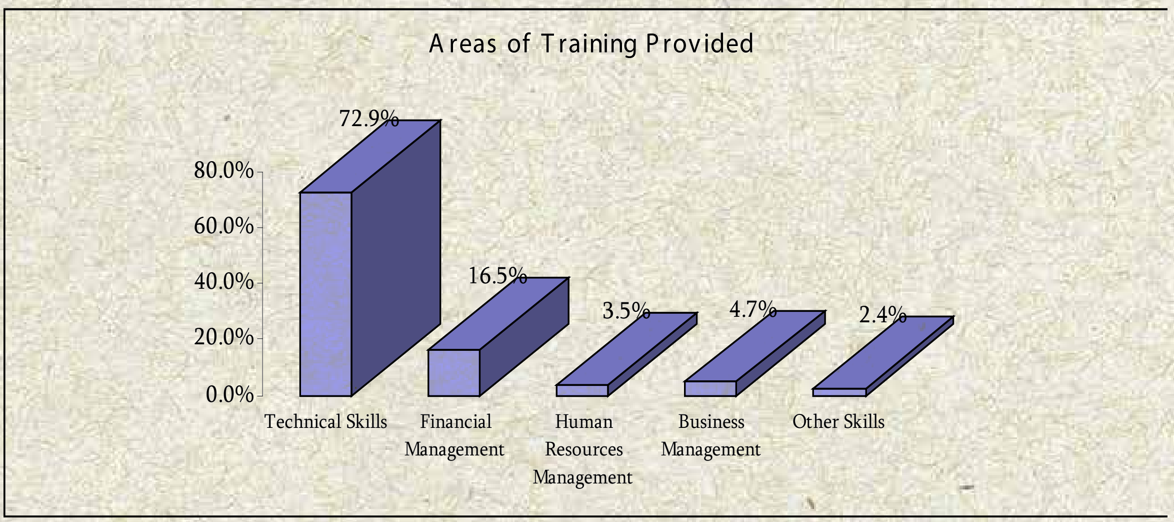
Figure 3 indicates that more practitioners in formally trained sub-sectors (media and the film sub-sector) were employed on a full-time basis (75% and 67% respectively). In the literary arts, 36% were in full-time employment while the figure was 28% for the music sub-sector.

In terms of receiving capacity building training, only 34% of respondents had received some form of training through workshops and seminars in the past year. 66% did not receive any training at all. For the individuals who received training, the areas covered in the training were as given on Figure 4.

Training has been predominantly focused on technical skills (72.9%), and less on the softer issues like human resources management (3.5%) and business management (4.7%), to include proposal writing, presentation and networking.

Figure 4: Areas of training provided



The demand for and willingness to receive training was high across sub-sectors. 91.8% of the respondents expressed that they required various forms of training. The priority areas for training required are given on the figure below.

Figure 5: Priority training areas

3.1.5. LEVEL OF EXPERIENCE

The level of experience in the sector was important in terms of determining the depth of knowledge and awareness of key issues related to the growth and development of the culture sector in Zimbabwe. The total number of years in the sector did not essentially determine income levels or quality of products from practitioners, as talent, skill and business acumen were more important variables.

70% of the artists have been in the sector for durations higher than five years, while 30% of respondents joined the culture sector within the past five years.

Table 9: Number of years in sector

		Frequency	%	Valid %	Cumulative %
Valid	Under 5 years	78	29.9	30.0	30.0
	5-9 years	85	32.6	32.7	62.7
	+10 years	97	37.6	37.3	100.0
	Total	260	99.6	100.0	
Total		260	100.0		

The relative proportions given on the table above suggest an increased growth rate in the sector within the past five years relative to the preceding decade. This growth may be linked to the high rate of informalisation of the Zimbabwean economy, with the culture sector providing an alternative source of income. The number of informal cross-border traders dealing with visual arts products has increased in the last few years. Moreover, the growth in the size of the sector may be an attribute of the investments by the private sector, donors and to some extent, Government, in the growth and development of the sector.

3.1.6. HOUSEHOLD INCOME

78% of respondents interviewed earned more than 50% of their livelihoods from employment in the various culture sector activities. Incomes were highly variable within and between sub-sectors, with a range of between US$1 per month, and US$6000 per month for the more established artists accessing international markets. Incomes tended to be irregular and depending on location and sub-sector. The study noted that about 40% of the artists fell within the US$10 and US$100 per month category.

As a proxy to identify the contribution of artists to household economy, we asked the respondents with whom the responsibility of ensuring household requirements was set. In 63% of the cases, the artist interviewed was the primary source of household income. These findings, as indicated on Table 10, are indicative of the direct livelihood benefits of the culture sector.

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Table 10: Responsibility for ensuring food and income security at household level

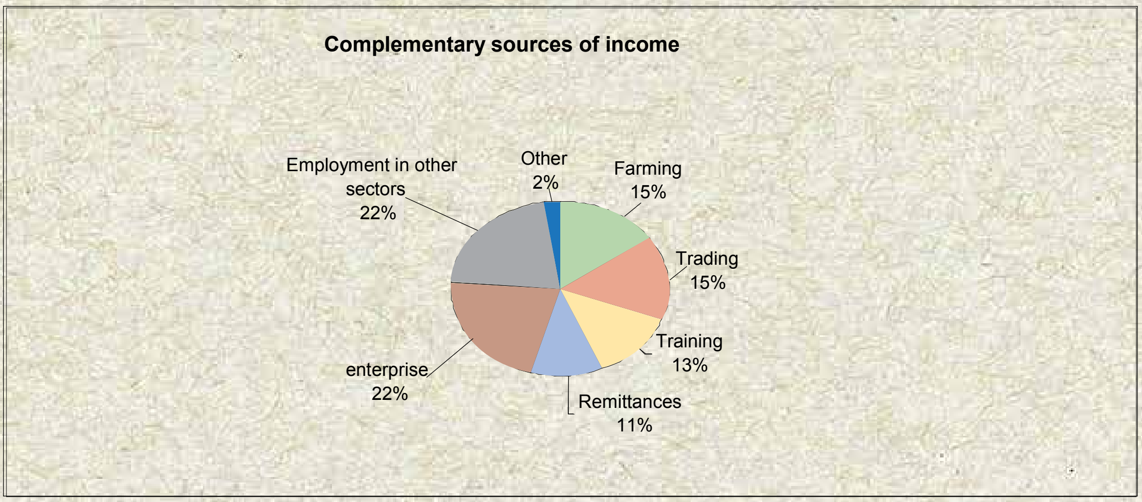
		Frequency	%	Valid %	Cumulative %
Valid	Mother	22	8.4	8.5	8.5
	Father	43	16.5	16.6	25.1
	Uncle/Aunt	4	1.5	1.5	26.6
	Brother/Sister	10	3.8	3.9	30.5
	Myself (Artist)	164	62.8	63.3	93.8
	Spouse	15	5.7	5.8	99.6
	Manager/Employer	1	.4	.4	100.0
	Total	259	99.2	100.0	
Missing	System	2	.8		
Total		261	100.0		

Incomes were irregular in nature due to market seasonality. Peak incomes tended to generally coincide with festive seasons when volumes of tourists were higher. The local performing arts sub-sector identified schools as a primary consumer of its product, implying higher income earnings during school term time, and private functions (e.g., weddings and corporate functions). Peak season for the culture sub-sectors are given below:

Culture Sub-Sector	Peak season
Performing Arts	School term time, October-December
Visual Arts	February, March, July, November and December
Music	November to December
Film	No marked peak season, but attendance high over school holidays
Media	No marked peak season
Cultural Heritage	School term times
Literary Arts	No marked peak season, but higher volumes of books may be sold at onset of school terms

To complement and smooth incomes, respondents interviewed are engaged in a number of livelihood activities as summarised on Figure 6.

Figure 6: Complementary sources of income



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The Sunday Mail Entertainment Sho

263 star turns cross border

The heading above, extracted from a newspaper, shows alternative and complementary livelihood sources being pursued by artists in various sub-sectors. The impact of lowness of incomes serves to de-motivate talented young individuals who would otherwise excel in the sector, from entering the sector in the first place.

URBAN AND RURAL EMPLOYMENT CONTRIBUTION

Incomes in the culture sector are distributed disproportionately in the urban and rural districts. Urban markets provide higher income prospects than rural areas due to larger market size and demand in emerging categories as home and office décor. There were notable higher proportions of artists in urban and peri-urban areas than in rural areas. Beyond market availability, facilities such as studios for film, visual arts and music recording and other support systems are available in urban areas. Stone sculptors tended to relocate to villages along major highways from where they could make and market various products. Spousal separation tended to be extended, rendering such artists more vulnerable to HIV and AIDS.

The rural areas are the major contributors of raw materials, especially for the visual arts sub-sector. Wood and stone are sourced mainly from the rural districts. Some pieces are partially processed and sold to carvers in urban centres who complete the processing and polishing before sale at much higher margins.

CHANGE IN REAL INCOME EARNED

In line with global and national economic trends, real income in the culture sector has declined in the recent past. For Zimbabwe, the decline in tourism figures and falling incomes, hence consumption of products from the culture sector, were identified as the main drivers of a declining sector.

72% of the respondents indicated that the incomes earned in the last three months were much lower in real purchasing power parity terms, than in the previous quarter, and even much lower than the amount received during the same quarter in 2007. 28% of respondents felt that there was no significant decrease in incomes. For some practitioners, incomes had in fact increased. There was a low willingness by respondents to comment on actual income received, and for the larger proportion, the capacity to recall incomes even for the previous month was very low, given the inflationary pressure on, and revaluation of incomes.

Table 11: Normalcy of incomes earned in last three months
Is this figure what you normally earn/receive?

	Frequency	%	Valid %	Cumulative %	
Valid	Yes	60	23.0	28.0	28.0
	No	154	59.0	72.0	100.0
	Total	214	82.0	100.0	
Missing	System	47	18.0		
Total	261	100.0			

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CASE STUDY: Mr. Domingo is a wire sculptor based in Marondera. According to him, wire sculpture started in the 80s. The major markets are in Germany, USA, UK, Japan and Australia. In 1995, Mr. Domingo sold a life size motorbike in South Africa for R6000, and bought a building stand in Marondera. He has sent his brother to the UK to exhibit his work. In 2000, ZimTrade facilitated his trip to Germany to exhibit his work. On his second trip to the World Expo in Germany, he made about 15000 Mark from sales. Since his first exhibition, he has expanded his business, employing eight people. So far, he has trained 50 people, some of them in South Africa. To facilitate his work, Mr. Domingo works closely with NACZ and Zim Trade as well the Culture Fund. On the local markets, sculptures are sold at Chapungu Village, while the USA is his major international market. However, local sales have plummeted. On date of interview (May, 2008), Mr. Domingo mentioned that he would be traveling to the USA. He had, among others, a US$4000 order. To develop the culture sector, Mr. Domingo believes some legislation like the CD1 form should be reviewed. He is unhappy

3.1.7. MAIN MARKETS FOR RESPONDENTS

The amount of income received by individual artists also depended on the market they were accessing. 67% of respondents interviewed market their products locally, 2.4% concentrate on the export market while the remainder depends on both markets.

At sub-sector levels, there were notable variations in predominant markets. The table below summarises the main markets by sub-sector.

Table 12: Major markets within sub-sectors

		Where do you sell your products or services?			
		Locally	**Export**	**Both**	**Total**
What specific sub-sector are you in?	**Film**	11 73.3%	0 .0%	4 26.7%	15 100.0%
	Performing Arts	48 64.9%	1 1.4%	25 33.8%	74 100.0%
	Visual Arts	59 64.1%	5 5.4%	28 30.4%	92 100.0%
	Literary Arts	8 80.0%	0 .0%	2 20.0%	10 100.0%
	Cultural Heritage	3 75.0%	0 .0%	1 25.0%	4 100.0%
	Media	3 100.0%	0 .0%	0 .0%	3 100.0%
	Music	30 69.8%	0 .0%	13 30.2%	43 100.0%
	Other	2 33.3%	0 .0%	4 66.7%	6 100.0%
Total		164 66.4%	6 2.4%	77 31.2%	247 100.0%

Marketing of products is conducted on individual basis (73.6%), groups (14.5%), agents (4.5%) and associations (2.5%).

3.1.8. MEMBERSHIP TO ARTS ASSOCIATIONS

At project baseline, 55% of artists are members of arts associations while 45% are non-association members. Arts associations have presence at provincial and district levels. The predominant sub-sectors in a given province tended to have sub-sector specific associations. The associations play a regulatory, coordinating and publicity function.

Membership to arts associations varied by specific sub-sector. Performing artists tended to be more associated (71%) compared to the visual arts (38.2%). In the visual arts, artists tended to belong to craft villages or groups rather than any formal associations.

Table 13: Membership to association by sub-sector

		Are you a member of any association?		
		Yes	**No**	**Total**
What specific sub-sector are you in?	**Film**	7 63.6%	4 36.4%	11 100.0%
	Performing Arts	52 71.2%	21 28.8%	73 100.0%
	Visual Arts	34 38.2%	55 61.8%	89 100.0%
	Literary Arts	7 50.0%	7 50.0%	14 100.0%
	Cultural Heritage	1 33.3%	2 66.7%	3 100.0%
	Media	0 .0%	3 100.0%	3 100.0%
	Music	27 60.0%	18 40.0%	45 100.0%
	Other	5 83.3%	1 16.7%	6 100.0%
Total		133 54.5%	111 45.5%	244 100.0%

3.1.9. KNOWLEDGE OF POLICIES GOVERNING SECTOR

51.6% of respondents were aware of government legislations and regulations governing the culture sector. The most frequently identified legislations were the Anti-Piracy Act, Access to Information and Protection of Privacy Act and the Public Order and Security Act. Respondents demonstrated limited awareness of sub-sector specific legislations.

Respondents in the performing arts and music sector demonstrated greater awareness of governing legislations and regulations due to more monitoring by Government. However, artists across all sub-sectors were aware of the expectation to register with the NACZ.

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Table 14: Awareness of government policy or regulation for culture sector

		Are you aware of any government policy OR regulations governing the culture sector?		
		Yes	No	Total
What specific sub-sector are you in?	Film	7 50.0%	7 50.0%	14 100.0%
	Performing Arts	44 61.1%	28 38.9%	72 100.0%
	Visual Arts	34 36.6%	59 63.4%	93 100.0%
	Literary Arts	9 64.3%	5 35.7%	14 100.0%
	Cultural Heritage	2 50.0%	2 50.0%	4 100.0%
	Media	2 50.0%	2 50.0%	4 100.0%
	Music	28 60.9%	18 39.1%	46 100.0%
	Other	5 83.3%	1 16.7%	6 100.0%
Total		131 51.8%	122 48.2%	253 100.0%

3.2. VISIBILITY OF THE CULTURE FUND

77% of the respondents had heard of the Culture Fund, while in 23% of the cases, the interview was the first time the name had been mentioned. Considering that the Culture Fund was established in 2006, such a visibility rate is very high. Table 15 show the awareness of the Culture Fund was higher among association members (87%) compared to non-association members (63.4%).

Table 15: Awareness of the Culture Fund among association and non-association members

		Have you ever heard of the Culture Fund of Zimbabwe Trust?		Total
		Yes	No	Yes
Are you a member of any association?	Yes	84 86.6%	13 13.4%	97 100.0%
	No	59 63.4%	34 36.6%	93 100.0%
Total		143 75.3%	47 24.7%	190 100.0%

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Awareness of the Culture Fund by sub-sector varied as given on the table below:

		Have you ever heard of the Culture Fund of Zimbabwe Trust?		
		Yes	No	Total
What specific sub-sector are you in?	Film	11 84.6%	2 15.4%	13 100.0%
	Performing Arts	65 89.0%	8 11.0%	73 100.0%
	Visual Arts	57 62.6%	34 37.4%	91 100.0%
	Literary Arts	13 92.9%	1 7.1%	14 100.0%
	Cultural Heritage	3 75.0%	1 25.0%	4 100.0%
	Media	3 75.0%	1 25.0%	4 100.0%
	Music	34 75.6%	11 24.4%	45 100.0%
	Other	5 83.3%	1 16.7%	6 100.0%
Total		191 76.4%	59 23.6%	250 100.0%

The Culture Fund was known mainly for its role in funding arts practitioners. Practitioners had heard about the Culture Fund through NACZ and various arts associations.

3.2.1. MAIN CHALLENGES AFFECTING THE CULTURE SECTOR

58% of respondents identified inadequate financing as the main challenge affecting productivity, growth and development of the culture sector. Across sub-sectors, the main challenges were identified and summarised as given on Table 16 below:

Table 16: Key challenges affecting the culture sector

	List Three Major Constraints Confronting The Culture Sector							Total
	Lack Of Funding	Lack Of Training	Lack Of Adequate Markets	Piracy	Lack Of Organisation In Sector	Shortage Of Equipment And Materials	Other	
Film	8 53.3%	2 13.3%	2 13.3%	0 .0%	1 6.7%	2 13.3%	0 .0%	15 100.0%
Performing Arts	53 70.7%	6 8.0%	6 8.0%	0 .0%	3 4.0%	6 8.0%	1 1.3%	75 100.0%
Visual Arts	42 46.7%	1 1.1%	21 23.3%	2 2.2%	3 3.3%	16 17.8%	5 5.6%	90 100.0%
Literary Arts	12 85.7%	1 7.1%	0 .0%	0 .0%	0 .0%	1 7.1%	0 .0%	14 100.0%
Cultural Heritage	3 75.0%	1 25.0%	0 .0%	0 .0%	0 .0%	0 .0%	0 .0%	4 100.0%
Media	1 50.0%	1 50.0%	0 .0%	0 .0%	0 .0%	0 .0%	0 .0%	2 100.0%
Music	22 47.8%	2 4.3%	2 4.3%	4 8.7%	4 8.7%	11 23.9%	1 2.2%	46 100.0%
Other	6 100.0%	0 .0%	0 .0%	0 .0%	0 .0%	0 .0%	0 .0%	6 100.0%
Total	147 58.3%	14 5.6%	31 12.3%	6 2.4%	11 4.4%	36 14.3%	7 2.8%	252 100.0%

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Respondents were asked on changes in the sector that would improve the performance of their establishments and growth and development at sector level.

Table 17 summarises the proposed solutions to challenges affecting sector.

Table 17: Proposed solutions to challenges
How can these challenges be overcome?

		Frequency	%	Valid %	Cumulative %
	Financial support	160	61.3	63.2	63.2
	Material support	26	10.0	10.3	73.5
	Training	22	8.4	8.7	82.2
	Copyright protection	7	2.7	2.8	85.0
	More events organised	19	7.3	7.5	92.5
	Other	19	7.3	7.5	100.0
	Total	253	96.9	100.0	
Missing	System	8	3.1		
Total		261	100.0		

3.3. SUB-SECTOR FINDINGS

At sub-sector level, the baseline study focused on the organisation, key defining characteristics, market analysis and challenges to growth within the specific sub-sector. The sub-sectors considered were the performing arts, visual arts, music, film and video, cultural heritage, literary arts and the media.

3.3.1. PERFORMING ARTS

ORGANISATION

The performing arts sub-sector comprises all establishments engaged in live theatre, dance, storytelling, poetry recitals and promotional activities. The sub-sector also encompasses puppetry, street theatre, stand-up comedy and cabaret. Music cuts across these genres. Major activities include creation, production, distribution and support services. Key stakeholders in the performing arts industry encompass the performers, singers and dancers, and at a technical level they work with choreographers, among others. Various private and public enterprises provide venues for the performing arts. These include community theatres, hotels and restaurants, and bars.

CHARACTERISTIC FEATURES OF THE PERFORMING ARTS SUB-SECTOR

- The performing arts sub-sector has two predominant categories: a traditionally inspired and contemporary urban influenced.
- Traditional dance: such as isitshikitsha, muchongoyo, jerusarema and others.
- Contemporary dance: such as ballet, aerobics, modern jazz and capuera are still more popular among whites (especially women); while hip hop, kwaito and traditional dance are more popular among blacks.
- On the whole, dance is a male dominated industry.
- The traditional imbube has a Nguni (South African) mbaqanga and, in some cases, Christian influence, and is often performed as a capella.
- Western music, Central and South African music have had an influence on local performing arts.

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- The performing arts have played a significant role in the struggle for independence and in communicating post-independence issues.
- Since independence, the number of performing arts groups has increased countrywide.
- Initial start-up costs and investments are relatively lower in the performing arts than in other sub-sectors like music and film.
- A larger proportion of artists in this sub-sector (about 60% for the study sample) were trained informally. However, the proportion of informally trained artists is much smaller than in the visual arts sub-sector (72% for the baseline study sample).
- The incomes are relatively low for groups with limited product export potential. For example, professional dancers earn in the range of US$50-200 per month. Functions are occasional and artists resort to other income-smoothing activities.
- Group sizes are often large. The range for performing arts groups is on average in the region of six to 15. Puppet shows are often one man show, so are stand-up comedies. Street theatres often have less than five characters.
- Large group sizes present a constraint in management and incomes. For a wedding or corporate function, dance groups charge in the range of US$100-300. By sheer group sizes, incomes per individual are often low and delayed. The high number of performing artists implies that artists may have to wait for a while before they secure another opportunity to perform.
- Management of groups is a major challenge. Splits and rivalries are common, and financial mismanagement is the most cited conflict zone. The performing arts are predominantly male dominated. Women are often involved in this sub-sector usually at school going age; thereafter social issues limit their participation. Leading performing arts comprised both men and women, although others are purely male in membership.

MARKET FOR THE PERFORMING ARTS

LOCAL MARKET

The markets for performing arts products is the largest across all sub-sectors, although in monetary value terms, incomes are in the main lower than the visual arts and the music sub-sector. Street theatre, which communicates various social issues in a hilarious way, is very popular in urban areas, especially in Harare. Some street productions have been broadcast on television, and as in other sub-sectors, they have lacked sufficient funding for continuity. Poor remunerations have reinforced poverty for some of these street performers who spend full days performing on the street sometimes for hardly any significant income. Quite the contrary, stand-up comedy is still catching up in Zimbabwe. Some entertainers prefer to amuse audiences in public transport, bars and other public places without awareness of prospects in careers in comedy.

Puppetry is common in schools, while contemporary urban dance appeals more in the townships. Contemporary urban dance groups are popular in Bulawayo, and have a strong South African influence: the music and regalia is predominantly Zulu.

Traditional dance groups are popular with hotels and corporate functions. Both traditional and contemporary urban dance are popular in weddings and corporate functions. The former has been marketed more to foreign visitors than the latter. At Victoria Falls Airport, for example, performing arts groups welcome tourists. The marimba performance is uniquely Zimbabwean, and is appreciated by tourists from the world over. Other African countries are now catching up on the marimba as well. Payments are dual: the hotel pays the group and groups collect money from hat takings.

EXPORT MARKET

Zimbabwean performing artists have toured regional destinations such as South Africa, Botswana, Malawi and Mozambique, and performed at international stages in the UK, USA, China, Germany, Austria, Canada

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and France. Performing arts groups with mbira music components are a hit with French and Scandinavian audiences. The main market for dance is Belgium, France and the UK.

CHALLENGES TO GROWTH IN THE PERFORMING ARTS

- Inadequate training and capacity in business networking, arts management, contract negotiation and financial management.
- In some instances, some groups established by members who have limited opportunities for education have challenges completing forms and applying for funding.
- Limited exposure and access to the internet, a powerful medium in searching for opportunities and advertising.
- Distribution chains for performing art products are often weak or lacking.
- The formal and informal training curricula lack adequate depth in creativity development.
- Few programmes have been entirely dedicated to the performing arts on local television.
- Small groups can charge less to clients. In Victoria Falls, it emerged from artists that some hotels would opt for the small unregistered groups which can accept mediocre fees for performances. This has the potential to bring down the standard of the industry when compared with regional competitors.
  For example, some small unregistered groups perform even without proper costumes or regalia; invest less on rehearsing songs and choreography due to limited resources, thus compromising the quality of performance they give. Some performing arts groups have never had the opportunity to perform in urban areas. This is due to lack of capital resources.
- Performing arts have not been made a mainstream activity in the educational system as they are viewed as extra curricula activities. As a result, the activity has not been well promoted as a career.
- Growth of theatre in particular has been curtailed by repressive legislation such as the Public Order and Security Act (POSA), owing to its potential role in brewing discontent and rebellion.

"There is a lack of spaces for rehearsing. We practise under a tree, and people see us. When we want to stage a show, obviously no one comes."

3.3.2. VISUAL ARTS

The visual arts sub-sector encompasses art forms that are visual in nature. This sub-sector includes paintings, photography, sculptures in wood and stone, batik, crocheting, weld art, beadwork, pottery and basketry. It emerged from the baseline study that the predominant form of visual art at provincial or regional level was to some extent influenced by the history of the community and proximity to markets and raw materials, as indicated in the following table:

Province	Visual art products
Matabeleland North	Wood and stone sculpture, basketry.
Matabeleland South	Painting, wood and stone sculpture, basketry, crochet art, pottery.
Bulawayo	Wood and stone sculpture, weld art, beadwork, painting, mixed media, photography.
Midlands	Stone, wire art, wood sculpture, plastic art, pottery, crochet art, painting.
Manicaland	Photography, crochet art, stone and wood sculpture, textiles, weld art, painting, basketry
Masvingo	Stone sculpture, pottery.
Mashonaland East	Wire art, photography, wood sculpture.
Mashonaland West	Stone and wood sculpture, basketry, paintings, ceramic painting, African attire.
Mashonaland Central	Stone and wood sculptures, weld art, basketry, pottery, beadwork, painting, crocheting and tie and dye.
Harare	All categories are available in Harare.

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The visual arts sub-sector is composed of artists operating as individuals or in groups. Within cultural villages, for example, an artist is responsible for production and selling his individual pieces, although prices may be relatively comparable for items in the same category. Individualism presents challenges to growth where such individuals do not have adequate technical capacity in managing their system as a business entity.

A number of key stakeholders were also identified as given:

Stakeholder	Key institutions
Artists	Painters, sculptors, bead artists, potters, weld artists, cartoonists.
Exhibitors and marketers	National Art Gallery, hotels, museums, studios, festivals, corporate art collections, craft villages (e.g., Tengenenge, Mbare Market, Nyanga Craft Village, Chapungu Village, Jairos Jiri Craft Shops, internet.
Funding, training and support institutions	Arts education training institutions, UNESCO, Culture Fund, various embassies, National Arts Council, corporate.

CHARACTERISTIC FEATURES OF THE VISUAL ARTS

- The visual arts sub-sector employs the largest proportion of artists in comparison to any other culture sub-sector. Besides the initial investment in training, the start-up cost is relatively lower than in other sectors.
- Only a few women are involved in visual arts. For example, less than 1% of photographers in Mutare are women. The involvement of women in this sub-sector is restricted but not limited to crochet art, pottery, tie and dye, basketry, batik, and bead art.
- Some artists consider photography as a lesser art form than painting and other forms of creative arts. The development of photography as a genre within the visual arts has been hindered by the growing prominence of digital photography, and high costs of film
- Photography is perceived as a novelty and means of capturing moments in time in our culture, rather than an art form.
- Visual artists generally work and market products as individuals. Group markets are common for sculptors, but even then sales are mostly at individual level.
- Women in the visual arts often work more in groups as cooperatives or clubs compared to their male counterparts. The organisation of women in these clubs is linked to their inclination towards savings clubs.
- There is a high level of irregularity in incomes in this sub-sector. Data collected indicated income variance of much greater than US$100 between successive months.
- The requirement for external funding was highlighted more in the visual arts relative to other sub-sectors.
- Highest returns per investment in this sub-sector are made by traders who purchase finished pieces and export them to regional and export markets. Profit from a US$5 piece may exceed US$200 in some instances.
- There is a general lack of management skills in individual and talented artists.
- Although the income component is significant in the livelihoods, some artists interviewed highlighted they are in the visual arts for the “love of the art”.
- Visual artists with formal training or qualifications tended to be more business oriented and viewed themselves as professionals. The choice of mentor and his success influenced the market potential and business acumen of the apprentice as well as potential income.
- The predominant visual art form tended to be variable between regions and provinces depending on history, resources available and market influence.

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- "Shona sculpture" was not in its entirety Shona. However, this is a great marketing strategy with global renown.
- More than any other sub-sector, the visual arts sub-sector depends predominantly on tourists.
- The visual arts sub-sector has been very innovative in making use of very cheap raw materials to produce unique art pieces. Corn leaves, scrap metal and waste paper are being used to make highly sought after art pieces. The use of recycled material has positive environmental implications and can result in partnerships with Western institutions concerned with "greening" initiatives.
- Galleries provide space for artists to display and market their products. A commission of 35% is charged by the gallery for each unit sold. However, the artist does not pay for the space. In Mutare, the National Art Gallery in some instances buys pieces from artists and resells at the gallery. This has an income smoothing effect for the artists.
- Art galleries facilitate training of visual artists and also provide guidance to artists on pricing, especially with regards to inflation adjustment.
- Galleries receive support from various individual or corporate sponsors called "Friends of the Gallery".
- Distribution of galleries across the country is poor.

MARKET FOR THE VISUAL ARTS

LOCAL MARKET

The local market for visual art products in Zimbabwe is generally depressed. Visual art products are seen as luxury items and associated with the higher income groups who have had exposure to other exotic art forms. The hyper-inflation in Zimbabwe has eroded incomes and reduced further the number of potential consumers of visual art products, and this in turn reduced the incomes of artists in this sub-sector. As an income-smoothing measure some artists resort to doing odd jobs, touting at bus termini and other menial jobs. This further reinforces the misconception that the culture sector is for the "unemployable". However, this practice is common in other economies where artists also work as waiters and cabbies.

Willingness to pay for visual art products was higher for utility than decorative art. Local consumers, especially the indigenous Zimbabwean, tended to buy such products with household utility value such as baskets, wooden stools, candle stands, door mats, crochet made table and seat covers, knobkerries and cooking sticks. Where decorative art is purchased, consumers prefer sculptures that depict their totems (identity), e.g., elephant, lion, crocodile, and buffalo.

EXPORT MARKET

Zimbabwe provides a lucrative visual arts market. The presence of such tourist attractions as the Victoria Falls and the Great Zimbabwe provide an opportunity to attract tourists, hence a market for the various products that this sub-sector can offer. The diversity in style and the unique creativity in Zimbabwean pieces have earned local artists a place on the international gallery. The product diversity implies capacity to meet the interests of various regional and international customers. Japanese, Chinese and Koreans have a preference for masks, while Europeans and Americans often opt for paintings and sculptures with the giraffe being one of the most popular piece. Mother and Child stone sculptures were bought predominantly by American customers.

Local customers seldom buy abstract art. Several factors can be attributed to this trend, including the role of religion in impacting the ability or freedom to appreciate local art, especially where it is perceived to challenge Western faith systems.

Based on a number of determining factors ranging from the artist, the creativity of the piece and the market considered, the value of visual art products varies from as low as US$0.50 to as high as US$250 for artists at grassroots to medium levels. High profile artists can sell pieces which fetch up to US$5,000 a piece. Incomes range from US$10 per month in Mashava to over US$700 per day at the Victoria Falls.

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On the international market, African cultural products are generally viewed in a single description - as African art. Cultural differences between African countries are not very obvious for the average tourist. However, West African batik clothing is distinct and is characteristically Ghanaian or Nigerian, and therefore more unique to the European and American market.

Zimbabwe's major competitors in the region are Malawi, South Africa and DRC for wood carving, and Zambia for basketry. Kenya and Tanzania have well developed wildlife tourism and a great market for various handcrafts. Although in general African art is made from environmentally friendly materials using cheaper labour, and therefore more competitive, these products are often not well marketed. For Zimbabwe, restrictive tax regimes and high freight costs transfer any potential income to regional competitors. Moreover, communication networks and access are limited. In Zimbabwe, only 1,2 million people have access to the internet. Less than 10% of artists use the internet to market their products or identify opportunities.

The major regional markets are in South Africa, Botswana, Zambia, Malawi and Mozambique, while UK, USA, Germany, Australia, South Korea, China, France, Portugal, Italy, Spain, Belgium and The Netherlands are the major international markets.

The major regional markets for visual arts products are proximal to border towns. Artists in these areas generally tended to fetch slightly higher prices than those in more interior towns or cities, except for Harare and Bulawayo.

The Government, through the Ministry of Youth Development, Gender and Employment Creation, is assisting women in selling art products overseas. Products are being sold in fairs in South Korea. There is big business; some of the women bring back cars from these fairs!

About 15% of artists are able to penetrate the export market in the visual arts sub-sector. South Africa emerged as the most important market for the visual arts. Higher volumes of tourists received accounted for the larger market share.

CHALLENGES TO GROWTH IN THE VISUAL ARTS SUB-SECTOR

- The visual arts market has declined in the past eight years due to a fall in the volume of tourists received[3]. Xenophobic attacks in May and June 2008 in South Africa adversely affected tourist figures for South Africa. Zimbabwe receives most of her tourists via package tours organised in South Africa. A decline in tourists in South Africa implies a falling market for the visual arts (and other sub-sectors) in Zimbabwe.
- The unfavourable economy in Zimbabwe has pushed an emerging middle income class below the poverty datum line. The reduction in disposable income for this group also reduces the income potential of the culture sector. Artists interviewed stated that in some months, the gross received hardly meets the costs of production.
- Interest in the visual arts is limited across the larger spectrum of the Zimbabwean society. For example, the admission fee into the Gallery is only US$0.02 for children and US$0.05 for adults (or Z$20million and Z$50million for children and adults, respectively on 2nd June, 2008). And, yet, admission rates remain low.
- The poor distribution of galleries across the country negatively affects the income potential of artists.

"The local market is dead! No one buys our pieces. Everyone seems to have an interest in the performing arts. I do not blame anyone; life has become so difficult that there is not enough disposable incomes for indulgence in the arts, people are struggling to feed their families".

View from a painter interviewed at the National Art Gallery in Bulawayo on 2 June, 2008.

[3]Artists and key stakeholders interviewed indicated that tourism has fallen since 2000. However, official statistics from the Zimbabwe Tourism Authority indicate that the figures increased from 1,996,615 in 2000 to 2,508,255 in 2007.

- Globalisation provides markets as much as it creates new and complex discontents that ultimately reduce income benefits to artists. South Korean companies have in recent years been exporting the rock used in Shona sculpture to South Korea and taking along with them talented sculptors to train South Koreans to carve Shona sculptures. These are then marketed at much higher value in comparison to the value charged in Zimbabwe. South Korea obviously has better market access than Zimbabwe. South Africa is also selling Zimbabwean art as "Proudly South African" on the global market. It is not clear whether the Government of Zimbabwe is able or committed to legislating against such plundering of local art.
- Power shortages and erratic power cuts significantly affect weld artists and photographers. Spoilage of film is a high risk for most photographers who process their films locally, unless digital photography is used.
- Media photographers are restricted in their work by the general restrictions affecting the media sector.
- The decline in the productive sector in Zimbabwe due to foreign currency shortages to procure raw materials has led to limited local market availability of various consumables for use in the culture sector. Painters, for example, mentioned that they purchase brushes, canvas and paints from neighbouring South Africa and Botswana. For some materials available locally, e.g., stone for sculptures, transport is a major limiting cost.
- The terms for export are not favourable for the visual arts and other culture sub-sectors. Duty is charged uniformly across all items classified as curios, irrespective of their value. The limitation of the duty regime is that it assumes the pieces are mass produced and a flat rate should apply. The price of a piece is first determined by ZIMRA and the duty is then charged. Unfortunately, sometimes the duty relative to the marked price is so high that the artist may either fail to pass the cost to the buyer or sell at a very low or no profit.
- Packaging and shipment costs are very high, as is the duty on visual art products. This restricts the export potential of local products. Tourists have the option of purchasing these pieces from either South Africa or Kenya.

Visual artists interviewed in Bulawayo identified 2000 as the last year in which they exported their products. On further examination, we found out that this was actually an exhibition organised in Gaborone.

- The individualistic nature of this sub-sector presents challenges to growth as most artists are not trained in managing their work.
- There is lack of management training in the curriculum of most institutions providing training in the arts and culture. Artists may bridge this gap by relying on agents, managers or promoters, but in most cases they are unfairly rewarded for both their creativity and labour in developing the various products.
- Porcelain art mainly imported from China is gaining local popularity in home décor. Prices for these art forms are much cheaper than locally made sculptures. This increases competition to local art.
- Like other sectors of the economy, the visual arts sub-sector has suffered from severe brain drain and institutional memory loss. Although statistics could not be ascertained, about 40% of Zimbabwean artists have migrated to neighbouring South Africa in pursuit of higher incomes and better markets. A significant number of these artists are in non-art related sectors.
- Some visual art forms are perceived as "black" from a Christian perspective. This view was held by people who hold strong views on the existence of supernatural beings such as goblins. There is a fear that these sculptures may in fact be life forms.

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3.3.3. MUSIC

The music sub-sector is concerned with all establishments involved in the creation, sound recording, publishing, distribution and live music. The key stakeholders in this sub-sector include artists (songwriters, composers, singers, solo musicians and bands); practitioners in production (producers, recording studios, sound and lighting service providers, video makers, etc.); promoters (event managers, music agents, talent scouts, radio disc jockeys, night clubs, music festivals, funding institutions) and marketers and distributors (record bars, radio stations, internet).

CHARACTERISTIC FEATURES OF THE MUSIC SUB-SECTOR

- Income for artists is earned from sales of albums, royalty payments and live performances within and beyond Zimbabwe.
- Incomes of musicians are highly variable. The range is from less than US$10 per month at grassroots level to over US$10,000 per month for established international level artists.
- The music genre of artist and target audience determine whether income will be earned from record sales or from live performances. For urban grooves artists, the audience is usually the young school going or young adults who are less likely to afford an original compact disc (CD), but would rather enjoy the music from the radio or get a pirate copy. The study found that securing a more mature audience as in Afro pop/sungura was associated with higher album sales and higher show attendance.
- Gospel music has a higher proportion of women relative to other music genres. About 65% of recorded artists in gospel music were women. The larger market for gospel music is also female.
- The growth of gospel music has been partly influenced by the harsh socio-economic circumstances in which most Zimbabwean exist. Gospel music provides comfort and hope.
- All recording companies in Zimbabwe are locally owned and managed.
- Most artists in the music sub-sector attempt to operate in more than a single specific function, for example, as composer, musician, producer and promoter. This is a common phenomenon which reduces quality of products so produced and constrains the development of the sub-sector.
- Leading musicians are only concentrated in the larger cities, Harare and Bulawayo. Some smaller cities have only a few leading artists, thus inhibiting the growth inertia.
- Predominant genre of music tends to vary across regions, in some cases even within similar provinces. For example, in Plumtree Afro pop (museve) is the predominant music genre, while in Gwanda and Beitbridge also falling within the same province, gospel music is more popular.
- The sector has benefitted immensely from the duty-free importation of equipment legislation.
- National and provincial galas and festivals have benefitted some musicians as they have exposed talent and impacted on the viability of the sector.

MARKET FOR THE MUSIC SUB-SECTOR

LOCAL MARKET

In the past ten years there has been a significant growth in the local market for Zimbabwean music. Up to the mid 90s, Western and South African music dominated sales in Zimbabwe. The changing taste was influenced to a large extent by such policies as the 100% and, later, 75% local content on national radio and by default, shortage of foreign currency to import international music, coupled with falling disposable income levels.
The study identified upcoming artists as harder hit by recent market trends in the music sub-sector. Upcoming artists tend to rely on curtain-raising for more established artists, but with falling crowd sizes and lower number of shows hosted, prospects for income have declined, given that they also sell much fewer albums relative to their more established counterparts.

A cross-sectional analysis within the upcoming artists in various genres indicated that those in urban grooves were more likely to earn less income from both live performances and albums sold. Most urban grooves fans are young, predominantly school-going, and do not have any disposable income to purchase albums. Lack of disposable incomes in young fans also implies that urban grooves artists are less competitive as curtain-raisers since their fans are either not permitted by law to be at such venues or they cannot afford the entrance fees.

Mr. Chimanikire, an artist and music promoter was asked to comment on the state of the music sub-sector. He mentioned that most local musicians are after a quick buck and would do less to develop a profile and career. Artists may be talented, but growth comes with capacity to manage fame. He felt that artists lack a good understanding of their trade. Mr. Chimanikire has previously managed such groups as Pengaudzoke (2004) and Kenneth Chigodora (2004-6).

The declining state of the Zimbabwean economy has negatively affected the music sector. The shortage of cash on the local market, exacerbated by the very low daily cash withdrawal limits from banks, implies low capacity for expenditure in entertainment.
The price of beer has been going up recently and this affects the promoters' ability to recoup costs from beer sales in the event that a function is not well attended.

Some of the popular songs are played as ring tones for cellular phones, but the marketing of local music through ring tones has yet to be exploited.

Development of support industries such as recording studios and, ironically, the shortage of foreign currency to purchase foreign albums have indirectly promoted local artists.

EXPORT MARKET

Zimbabwe exports most of its music products to countries within the Southern African region. The export market share is highest for Afro pop and jazz music genres, and least for urban grooves. The market is highest in South Africa, Botswana, Malawi, Namibia, Zambia and Mozambique. The high presence of Zimbabweans in the Diaspora, particularly in the UK, USA, Australia and Canada, has created a market for local Zimbabwean artists. The demand is often for live performances rather than album sales. Music festivals like the Zimbabwean Music Festival in the USA are an important platform for marketing local music products to the global market.

Higher internet connectivity and access to a number of Zimbabwean-run internet cafes has reduced demand for hard copies of music, as it is often saved on computers and CDs. Live performances scheduled for the Diaspora have been done in partnership with South African artists to make the shows more appealing to a larger audience and increase gate takings for either partner.
Zimbabwean traditional mbira/folklore music is in high demand in the Scandinavian countries, while afro pop and jazz appeal across a larger market in Africa and overseas. Zimbabwe's share on the global market remains small due to intense regional and international competitors.

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There are a number of platforms for marketing local music locally and on the international market. The following were identified:

- Mthwakazi Music Festival
- Ibumba Festival
- Intwasa Arts Festival
- Harare International Festival for the Arts
- Winter Jazz Festival

CHALLENGES TO GROWTH IN THE MUSIC SUB-SECTOR

- Recording costs are so high that most upcoming and some established artists are unable to record and market their music.
- Lack of music on the market as well as the prevalence of piracy as consumers record music off the radio. Some hit songs like Tombofara by Kevin and Muzi (1992) were never recorded for sale. Some artists actually use homemade compact discs with no sleeves or label on them.
- Leading artists prefer recording outside Zimbabwe mainly in South Africa and sometimes it takes time before their latest releases are available on the local market. In some cases, this has tended to fuel piracy even among people who would normally buy an original recording.
- There is limited capacity and resource availability to enforce anti-piracy laws.
- Low disposable incomes are reducing capacity to purchase music from record bars and other outlets.
- Show attendance has also dropped due to low disposable incomes, high cost and shortage of transport to support a vibrant night life.
- The price of alcohol has gone so high as to depress the traditionally high consumptive behaviour associated with music live shows. Most establishments hosting music concerts rely more on profits from sale of alcohol than from gate takings. With depressed volumes sold, artists' incomes fall likewise.
- The general politically tense environment restricts night life.
- Frequent power cuts are threatening the music sub-sector as artists fail to get opportunities for work.


Entertainment The Herald

Power cuts, low turnout mar Nyanga Arts Festival

- Although artists may receive up to 25% of total value earned in royalties, these royalties are usually paid quarterly. In real terms, this presents a significant loss in income to the artist given the high inflation rate in Zimbabwe.
- There is a shortage of musical instruments across all provinces. Import of musical instruments is duty-free but purchase costs remain too high for artists. For some groups interviewed, sometimes no profit is realised from live shows when the costs for hiring equipment are factored in.
- Like in other sub-sectors, musicians have migrated out of Zimbabwe to pursue their careers elsewhere. Thomas Mapfumo, Mbuya Stella Chiweshe, Achuzi, Go Boyz and Gangsters are among some of the artists who are plying their trade from outside the country. Some are now working in non-related sectors of the economy.
- Artists have limited access to space for rehearsing.

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- Artists have limited access to space for rehearsing.
- The increased content of local music on local radio has widened the stage for artists to showcase and market their products. However, overplaying same records actually tended to reduce the marginal propensity to purchase music products.
- Most musicians and promoters invest fewer resources in talent development and product development, but appear more in pursuit of quick returns. Media reporting of the culture sector is weak, there is no coverage of local artists (only one magazine available). Newspapers carry adverts of performances and some commentaries, but most stories are Western artist centred and online based.
- Change management in the music sub-sector has been very difficult, new music genres are often not taken seriously. In South Africa, kwaito, house and rap music are gaining popularity. However, the Zimbabwean market is more resistant to change.

3.3.4. FILM

The film sub-sector comprises all establishments engaged in motion pictures, video and film. Stakeholders in this sub-sector are classified according to activities. These include creation, production, distribution and support services. They are organised into creation (script writers and actors); production (film directors, producers, costume designers, lighting engineers, camera operators, floor managers and film editors); distribution (film festivals e.g., Zimbabwe International Film Festival, International Images for Women, Harare International Festival of the Arts (HIFA), Intwasa Arts Festival, Manica Fest, Southern African Film Festival, cinemas e.g., Rainbow Cinemas and Cine) and support services (financing organisations, e.g., private sector companies, donors, government departments, individuals).

CHARACTERISTIC FEATURES OF THE FILM SUB-SECTOR

- Zimbabwe has only one television station owned by the state. A privately owned television station, Joy TV, was launched and discontinued a decade ago.
- Incomes for both creative and technical artists are generally low in this sub-sector, and the rate of migration to regional destinations for employment prospects is high.
- The major funding organisations of locally produced films are donors, embassies and the private sector. The former have been more important in the development of this sub-sector.
- Local investors view the film industry as highly risky. The dominant viewpoint is that the local market is not sufficient to generate adequate sales for a profitable project, and the quality of local films is still not competitive internationally.
- Key stakeholders in this sub-sector argue that there is “no industry to talk about”. Even the most highly prominent film makers do not rely solely on this sub-sector to earn a livelihood.
- Film production is very expensive in Zimbabwe, and high production cost is the main barrier to entry. Depending on quality and production system, a 90 minute feature film would cost about US$100 000, while a short film (5-20 minutes) may cost about US$10,000.
- At one point Zimbabwe was a focal point for film location and casting. Major films include King Solomon’s Mines, Lumumba, Cry Freedom, and Thinking about Africa, among others. Such international films have provided skills transfer and networks to local film makers.

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- Although minimally exploited due to the unfavourable prevailing legislation and country image, Zimbabwe is still an ideal location for international film production. Key characteristics include favourable weather, high literacy levels, low labour cost, variety and scenic location, low crime rate, shorter distances between locations and fairly good infrastructure.

MARKET FOR THE FILM SUB-SECTOR

LOCAL MARKET

The propensity to consume film products is high on the local market. However, the film industry has not done much to provide products of competitive quality and quantity to this market. Few locally produced movies have been shown on the local cinemas. With the intensification of globalisation, the trend has been towards purchasing of Nigerian movies and South African film products, in addition to movies made in Europe and the USA, Korea and China. Nigerian movies have been promoted more by local television. However, the benefits of such a lucrative market are mostly transferred to the pirate industry, albeit some of it Nigerian. Indian movies, although increasingly popular globally, have hardly penetrated the local market.

Short films are often secluded to a limited market; in particular they are the focus of film festivals. In limited instances, these short films have been shown on national television. The local film market is mainly urban. In some urban centres, however, cinemas are either not functional or have technical challenges accessing latest movies. The home video clubs and satellite television are the major challenges to the local film market. In addition, a small percentage of local consumers are likely to purchase locally made movies.

EXPORT MARKET

Zimbabwean film carries a contemporary development theme. This is largely influenced by the history of the development of the industry as well as the influence that funding organisations have on production. This typically makes the film industry more attractive to the African market. However, the networks for marketing Zimbabwean film products are still at developmental stage.

CHALLENGES TO GROWTH IN THE FILM SUB-SECTOR

- Film production is a high capital investment project. For example, making a 90 minute film in Zimbabwe would cost about US$100 000. The private sector has been less supportive of financing the film industry and lack of funding has thus hampered the growth of the film industry, with high potential movie projects failing to take off.
- The development of the film industry in Zimbabwe has been hinged on the international development agenda. Local creative talent has had to comply with content specification given by donors and, as such, the narratives of these films are in line with donor priorities and the rights based approach to development. This has stifled development of local creative talent. However, great movies with international acclaim have been produced from these initiatives. Examples include Neria and Flame (women's rights), Everyone's Child (child abuse, orphans, HIV and AIDS), Consequences (teenage pregnancy) and More Time (HIV and AIDS).
- The film sub-sector, like other culture sub-sectors in Zimbabwe, is governed by strict laws that censor content. This has implications on artistic value and content of films, and restricts creativity. The Censorship Board, for example, restricts on screen kissing.
- Zimbabwe has limited technical capacity in film production. Equipment is outdated in some establishments and the skilled technicians, directors and actors have migrated to South Africa and other international destinations in pursuit of better incomes.
- There are a few institutions offering training in film. In addition to the UNESCO Film School, recently a two year Diploma in Film and Television has been introduced at the Zimbabwe Film and Television School for Southern Africa.

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- Most local television soaps and movies are not well funded. The quality of local television productions has remained low as a consequence of directors recruiting cheaper and inexperienced actors, given strained budgets.
- The lack of consistent funding resources has led to premature cessation of productions, "killing" of actors, etc. On the contrary, some television soaps like Isidingo and Generations in South Africa have been running for over ten years.
- The return per investment may not financially justify local film production.
- Incomes earned by artists in this sector are often very low and, given their celebrity status, may create some social pressure and act as a deterrent for young people intending to pursue careers in the film industry. Some actresses interviewed indicated that for some television soap production they were working on, their income per episode was only enough to meet their transport costs for public transport.
- Short films were identified as good for developing local talent. However, where opportunities for growth in career within the film sub-sector are limited, their effectiveness in growing the industry becomes limited as artists eventually divert to other industries in search of livelihood sources.

Some film makers have voiced some disquiet over the influence of donors on film narrative. As Tsitsi Dangarembga (Dangarembga, 1999) has put it, film requires money to make, and "those who do not have the money are debarred from making film". She raised questions about the "gate-keeping" role of donors, who favoured some directors over others and some narratives over others. Although she had directed the film Everyone's Child, she had yet to find her own unfettered voice as a film-maker. "Everyone's Child is not the film I wanted to make. I didn't want to make another AIDS film on Africa. I was not empowered to make the narrative that I wanted to make."

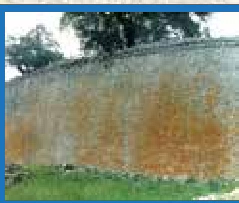
- Although women have contributed enormously to the development of the film industry in Zimbabwe, they continue to play a peripheral role with only an estimated 12 of them having film director role.
- The baseline study identified regional imbalance in exposure within the film sub-sector. Some films with a different cultural and language setting than Harare still have to be set in Harare for reasons based on funding source.
- The film sub-sector is weakly organised, with limited association membership. Only the Independent Film Producers Association of Zimbabwe was identified. In Bulawayo (during the course of this study) actors were in the process of registering an association called Zimbabwe Actors Equity whose mandate would be to, among other things, improve working conditions for actors.
- There are very few associations in the film industry to provide platforms for discussing challenges, opportunities and strategies for sectoral development.
- The perceived high political content in local television has encouraged many households to purchase digital video decoders (DVD), thus taking away willingness to visit the cinema. Piracy is very high as original DVDs and video tapes are either too expensive or not available on the formal market for consumers. The weak enforcement of anti-piracy laws in Zimbabwe exacerbates the situation.
- The quality of local television productions has remained low as a consequence of directors recruiting cheaper and inexperienced actors, given strained budgets.

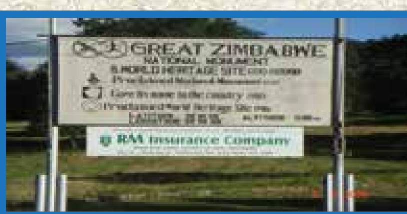
One actor interviewed in Bulawayo mentioned that, "Actors spend their whole lives entertaining people, and when they eventually die; they die paupers with nothing to show their contribution to the industry. Imagine, last month we received only Z$500 million (US$0.50) per episode! It's not even enough for bus fare. We continue coming because we hope things will get better some day".

3.3.5. CULTURAL HERITAGE SUB-SECTOR

The cultural heritage of a people "includes works of its artists, architects, musicians, writers and scientists and also the work of anonymous artists, expressions of the people's spirituality, and the body of values which give meaning to life. It includes both tangible and intangible works through which the creativity of that people finds expression: languages, rites, beliefs, historic places and monuments, literature, works of art, archives and libraries" (UNESCO, 1982). The baseline study considered establishments concerned with historical and cultural significance to include museums, national monuments, cultural and craft villages, national shrines, local architecture or landscapes and art galleries.

(a) National History Museum in Bulawayo


(b) Great Zimbabwe Ruins



(c) Great Zimbabwe Monument

Zimbabwe is a country of great cultural diversity. It is the only country named after a cultural heritage site, Great Zimbabwe Ruins built between 1200-1500AD, and conferred World Heritage Site in 1986. The country also boasts of other monuments of great historic and cultural value like the Khami Ruins south of Bulawayo and Naletale Ruins. Other institutions of cultural importance identified by this study are listed on the table below:

Museums	Zimbabwe Museum of Human Sciences (Northern Region, Harare); Natural History Museum (Western Region, Bulawayo); Great Zimbabwe Monument Site Museum (Southern Region, Masvingo); Mutare Museum (Eastern Region, Mutare); Zimbabwe Military Museum (Central Region, Gweru).
Monuments	National Heroes Acre and Provincial Heroes Acres.
Historic Sites	Great Zimbabwe Ruins, Khami Ruins, Naletale Ruins, Chinhoyi Caves, Matopos Rock Paintings, Cecil John Rhodes' Resting Place, Matendera, Muchuchu and Kagumbuzi Stone Ruins in Buhera, Rock Painting of Diana's Vow in Rusape.
Shrines	Matopos World Heritage Site, Njelele, Chinhoyi Caves.
Traditional Institutions	Old Bulawayo, traditional drums and songs, stories, signs and symbols, custodians of culture including traditional healers and their medicine, ZINATHA, chiefs.
Key Institutions	NMMZ, UNESCO, MS Zimbabwe, National Archives, Culture Fund, research institutions, universities.

According to the National Museums and Monuments of Zimbabwe, the country is divided into five regions, with each region having a specific mandate in terms of maintenance of cultural heritage.

Region	Mandate
Northern	Human sciences, cultural and physical anthropology
Eastern	History of transport
Southern	Archaeology
Western	Natural history
Central	Military and mining history

Although concentrated in the Southern region, archaeology cuts across all regions. Analysis across the regions described is indicative of a rich but weakly promoted and packaged cultural heritage.

Zimbabwe is known for its rich culture, complemented by the warm heartedness of its people. Although tourism has emerged as a key industry for receipt of foreign currency revenue, the main attraction is an experience of African and Zimbabwean culture, to learn about the country's cultural heritage and on return, "take a piece of Africa" from the visual and performing arts sub-sectors e.g., sculptures, and a chance to dance in the "Boma" cultural villages. The photographs taken with local people in a cultural set-up attracts potential tourists as much as does the scenic and majestic beauty of the Victoria Falls.

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Inspite of this, there has been limited effort to promote the culture sector for its direct contribution to the tourism industry and national GDP. In 2007, a total of US$365 million was earned from the tourism sector. A large percentage of this figure was indirectly and directly contributed by the cultural heritage sub-sector, although it is counted under tourism.

Zimbabwe has a high diversity of ethnic groupings: there are two main languages spoken and 15 minority languages, providing a rich background from which a vibrant cultural tourism sector could be developed. Although infrastructure for some national monuments like Great Zimbabwe is functional, Khami Ruins on the other end is declining due to lack of resources for maintenance. Old Bulawayo, a cultural village, is still being developed, albeit at a slow pace.

MARKET FOR THE CULTURAL HERITAGE SUB-SECTOR

LOCAL MARKET

The local market for cultural tourism is generally depressed due to low and falling levels of disposable incomes. The larger share of this market is attributed to visits by students. The trend has been on the negative in the past five years.

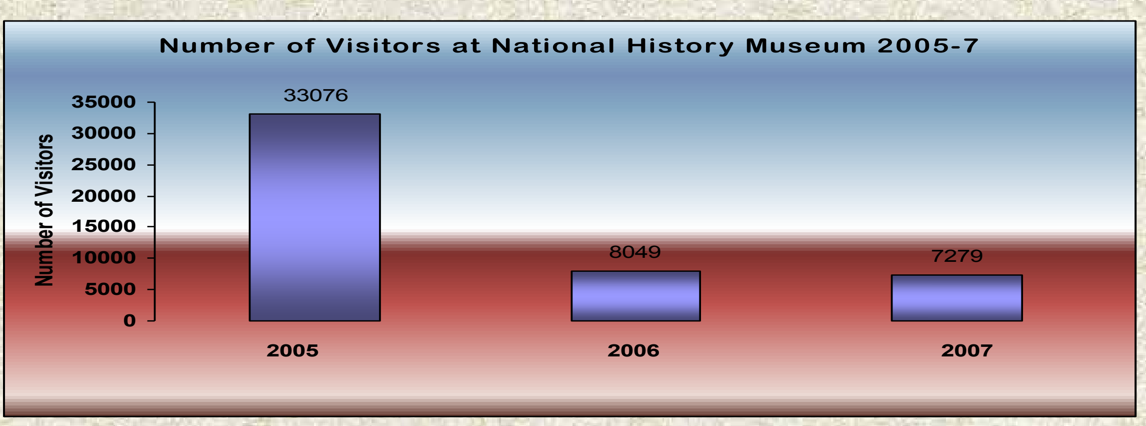

Figure 7: Number of visitors at National History Museum 2005-7

EXPORT MARKET

Zimbabwe has a rich and diverse cultural heritage, but its competitiveness falls below that of regional competitors. Zambia, a country of 73 ethnic groups, has managed to package for cultural tourism about 23 of its traditional ceremonies. South Africa has reached significant milestones in promoting urban landscape cultural tourism where tourists visit Soweto in Johannesburg to learn and observe the culture of the local people. Zimbabwe, on the other hand, has concentrated less on cultural heritage but more on the Victoria Falls, which ironically is being advertised as a tourist attraction by other regional member states.

In terms of gastronomy, the hotel industry in Zimbabwe has diversified the menu to include traditional African dishes, served traditionally with African traditional music and dance performances. This package has proven popular with tourists, especially at the Victoria Falls. In Victoria Falls, all 26 groups registered with the National Arts Council are contracted by local hotels. In fact, some hotels have over three groups contracted and artists working full time.

Zimbabwe receives most of its tourists from within Africa, predominantly South Africa (1,362,982 in 2007), Zambia (301,265 in 2007), Botswana (227,777 in 2007) and Malawi (111,117 in 2007)[4].

The USA recorded a change from 32,968 tourists in 2006 compared to 26,464 received in 2007. Growth was recorded for China (12,349 in 2007 up from 9,583 in 2006), South Korea (6,597 in 2007 up from 5,424 in 2006) and Malaysia (71% growth to 1,774 in 2007).

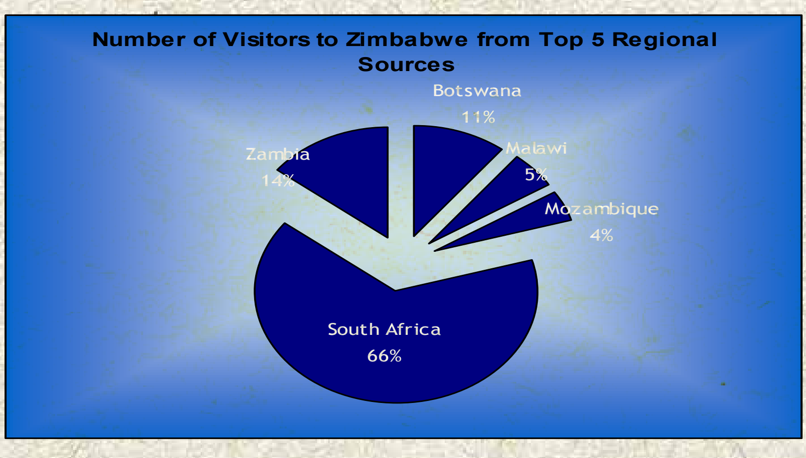

Figure 8: Number of visitors to Zimbabwe for top five regional sources

There is lack of adequate investment into this culture sub-sector both from the Government and private sector. Cultural events and heritage are little known and poorly marketed both locally and internationally. Key informants interviewed concurred that Zimbabwe could benefit immensely from the World Cup through cultural tourism if the proper infrastructure and strategy are put in place. Given the time remaining before the 2010 World Cup, setting up sites now was viewed as unlikely to make any significant impact, but rehabilitating and including in package tours existing cultural heritage sites, events and institutions could be more beneficial.

[4]*Source: Zimbabwe Tourism Authority. 2007. Tourism Trends and Statistics. 2007 Annual Report*

CHALLENGES TO GROWTH IN THE CULTURAL HERITAGE SUB-SECTOR

- There is a very high staff turnover at various cultural heritage institutions. Most of the experienced staff have emigrated out of the country, creating an institutional memory loss and threatening the maintenance and development of this sub-sector.
- Lack of capacity - financial and human - to maintain the various places of cultural heritage significance. Vegetation, e.g., grass is often overgrown, concealing the scenic beauty of these sites and making visiting unpleasant to tourists. An example is the Khami Ruins visited in this baseline study.
- Training of tour guides has not been adequate to facilitate a vibrant and educative cultural heritage industry. For example, the Natural History Museum in Bulawayo has not conducted any training of tour guides in the last ten years.
- The cultural heritage sub-sector has been increasingly disjointed due to selective promotions of components of this sub-sector while ignoring others. For example, traditional healers and their contribution is often less discussed or promoted, although traditional healers are the custodians of traditional dances and other indigenous knowledge. This is perhaps also a result of the paranoia of Western influence on local culture and beliefs.
- Oral history has not been effectively captured due to limited capacity and resources for such work. Universities have been actively capturing some invaluable information, but this has mainly been for the purpose of writing academic dissertations and theses that are hardly transcribed to text books or journals. Low life expectancy, currently at 37 years, also reduces the inter-generational transfer of oral history.

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- Most of the current museums were established during the colonial era. Their content does not adequately reflect Zimbabwean culture from an African Zimbabwean view point. However, in recent years work has been ongoing in establishing community museums. In Hwange, however, this has been met with conflict between the two major tribes: Nambya and Dombe, on the naming of this community museum and ownership of some artifacts. This has stalled progress in operationalising this initiative.

CASE STUDY: COMMUNITY MUSEUM PROJECT IN HWANGE

National Museums and Monuments of Zimbabwe (NMMZ) is running a community museums programme. The objective of this programme is to establish community based institutions in order to revive and propel the culture of local communities. The emphasis is on underrepresented communities nationwide. Currently running is the MS Zimbabwe sponsored BaTonga Museum in Binga which over the past five years has recorded a success in implementing community based programmes.

Through this kind of programme, NMMZ hopes to enhance the cultural position of these communities and transform them into active and visible players on the national cultural landscape. From an educational perspective, the aim is to promote the learning, understanding and appreciation of cultures of the different and underrepresented communities in Zimbabwe through the direct involvement of schools and other institutions.

NMMZ is in the process of establishing a community museum in Hwange at the former Colliery Sports Pavilion. With the help of MS Zimbabwe, data is being collected on the cultures in Hwange. Consultation with local leadership as well as community mobilisation to raise awareness on the project has been done.

The cultural heritage programme is set for 15 local rural schools, if permission to proceed is granted by the Ministry of Education. These clubs will be working on different tasks to collect and preserve cultural information. The following activities could be facilitated:

- Making of artifacts
- Production of plays
- Research and collection of oral history
- Revival of traditional music
- Visual arts production which comments on culture
- Poetry - traditional and contemporary
- Writing diaries to document present day culture
- HIV AIDS and culture debate

Courtesy of Marianne S. Anderson, Advisor, MS Zimbabwe

3.3.6. LITERARY ARTS

The literary arts comprise creative writing - poetry, prose and drama. The sub-sector also encompasses manuscripts and publishing, as well as establishments concerned with the writing and production of books and magazines, design, printing, sales and distribution. Key stakeholders in this sub-sector include writers, story-tellers and performing poets, libraries and research, paper manufacturers, printers, designers and photographers, publishers and distributors.

In order to promote and support literary arts, the research recommends that educational curricula be reviewed to enhance the development of creative talent and a culture of reading. Budding writers associations must be prioritised in order to give young writers the space for skills development and networking.

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CHARACTERISTIC FEATURES OF THE LITERARY ARTS

- The literary arts sub-sector is highly diverse in content as a result of growth in the sector and changing contexts since the first Shona and Ndebele novels were published in 1956.
- Themes in Zimbabwean literature range from folklore, myths and legends, to pre-independence struggles and living in a post-independent Zimbabwe with its challenges and opportunities.
- Zimbabwe has produced many leading writers who have won international awards for writing excellence, especially in African literature in English. Examples include Doris Lessing (The Grass is Singing), Shimmer Chinodya (Harvest of Thorns) and Chenjerai Hove (Bones, Shadows).
- The main publishers include College Press, Longmans, Zimbabwe Publishing House, Mambo Press, Weaver Press and amaBooks. These publishers are mainly concentrated in urban centres.
- The local market for literary arts is very limited. The export market, although lucrative, has not been fully exploited especially by the second generation of literary artists.
- The literary arts are the smallest sub-sector mainly because the returns for time investment in the sector are delayed, thus discouraging entry into this sector. Formal literacy is also a prerequisite and barrier to entry into this sector.
- Most writers in this sector are employed on a part time basis. The sub-sector is not yet fully developed to sustain livelihoods for most of the artists in this sub-sector.
- With globalisation, the trends are towards printing books in China where material and labour costs are lower. The effect is the loss of business for local industries.
- Internet publishing is increasingly becoming more popular in developed countries. Internet access is still limited in developing countries and has not been taken up by local writers.
- The Zimbabwe International Book Fair (ZIBF) is held in Harare every July-August to showcase products in this sub-sector
- The reading culture, especially among young people, is absent. Such initiatives as the mobile library and the book reading week have been implemented to promote a culture of reading.
- There are a few programmes targeted at promoting the literary arts, especially in schools. Eversharp, through its essay competitions, has previously run some promotional programmes.
- Budding writers associations have been established in most of the major urban centres. Attendance is regular to erratic, but numbers are relatively low since meetings are held in the evenings in most cases.

MARKET FOR THE LITERARY ARTS

LOCAL MARKET

- Local market for literary arts is very limited. Good sales can only be achieved for books that are selected as set books for literature in English, Shona and Ndebele. Set books have at least three years on the syllabi.
- Performed poetry is active at school level, but beyond high school there are limited opportunities for young people interested in pursuing this art form. Successful poets are those who haveblended poetry with music or focused on praise poetry. Such poetry is mainly performed during official functions. The preference in the latter has been for poets with a traditional approach and outfit.
- There are a few magazines published in Zimbabwe. The most popular magazines are usually gossip magazines. Popular magazine brand names like Parade are no longer being published.
- The major market for local novels has been school libraries. Given the current budgetary constraints as a consequence of inflationary pressure on tuition fees, schools are only purchasing set books.

The prohibitively high price of books on the local market restricts purchasing of local publications to the middle and high income groups. The high income groups tend to purchase more motivational and leadership books than locally produced novels.

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EXPORT MARKET

- The major markets for Zimbabwean literary arts products include Kenya, Botswana, Ghana, and The Netherlands.
- Zimbabwean established literary artists are prominent on the global scene. Only the already established writers are able to publish with regional publishers and have an opportunity for international market.

CHALLENGES TO GROWTH IN THE LITERARY ARTS

- The culture of reading books, especially those by local writers, is relatively less developed among young people in Zimbabwe. An estimated 1% of the population buys books. The television and computer based games were identified as influential in discouraging reading.
- Higher demand for locally written books exists for those literature texts selected as set books by the schools examination board, ZIMSEC.
- The cost of books is prohibitively high, given low disposable income levels.
- The market for various local literary art products is very small.
- Very few young people are pursuing careers in writing. This creates future sustainability challenges and restricts sub-sectoral expansion in the expression of local culture through literature.
- Funding to support the production of books is limited to only a few established writers. Given the high printing and publishing costs, many books remain as manuscripts.
- Royalties for writers are paid after a number of months, and given the high inflation rate, the incomes in real terms for writers and other stakeholders are falling and are very low.
- There are limited platforms for expressing performed poetry. Markets for this poetry are very limited.
- The ZIBF has faced a number of challenges, particularly funding and the impacts of the negative perceptions about Zimbabwe. Such negative perception, coupled with hosting a rival International Book Fair in Cape Town, constrain development of the local literary arts sub-sector. Travel and exhibition costs will generally tend to limit numbers attending. Due to lack of funding in 2008, it was not possible to hold a fully-fledged international book fair in Zimbabwe.
- There are very few reputable publishers countrywide. In Bulawayo, there is only one publisher, amaBooks, and this publisher only accepts books written in English. In Gweru, the reputable publisher available is Mambo Press.
- Currently, local languages books are written in either Shona or Ndebele. There are 14 other indigenous languages but very few have been published[5] .
- Irregular supply of electricity disrupts productions.
- The legislative framework and capacity to enforce copyright laws is constrained in Zimbabwe. Such institutions as Reprographic Rights Organisation of Zimbabwe and Zimbabwe Music Rights have limited resources to conduct relevant work.
- The Literature Bureau, which previously had a coordinating function within the literary arts sub-sector, and providing guidance to budding writers, was abolished in 1999.
- The literary arts are often ignored or given less prominence in arts festivals.

[5]*A Survey of the Minority Languages of Zimbabwe, by S. J. Hachipola, UZ Publications, 1998, p 1.*

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3.3.7. MEDIA

The media sub-sector is concerned with all establishments involved in publishing, both in print and broadcast. The major stakeholders in this sub-sector are newspaper publishers, radio and television companies and support services such as marketing and distribution.

The media sub-sector is divided into two main categories:

1. Broadcasting: In Zimbabwe, the major stakeholder is the Government through the Zimbabwe Broadcasting Holdings which operates the only television station in the country and a radio station with four channels. A community radio, Radio Dialogue, is the only other alternative radio available. Zimbabweans are also accessing foreign television and radio, especially South African, via Digital Satellite Television (DSTV) and use of such decoders as Wiztech and Fortech imported from Dubai and South Africa.
2. Print: The print media includes such publications as newspapers, books and periodicals. Activities within the print media encompass creation, production, distribution and support services.

CHARACTERISTIC FEATURES OF THE MEDIA SUB-SECTOR

- The media sub-sector in Zimbabwe is highly controlled by Government. Four key governing legislatures are: the Broadcasting Services Act, Public Order and Security Act, Access to Information and Protection of Privacy Act and the Interception of Communications Act.
- Both television and radio media are owned by the Government and no domestic private stations are allowed.
- Coverage of radio and television in rural areas is low, due to poor signal carrying infrastructure. Overall, 30% of the population receives broadcasts by the ZBC.
- Internet access is increasing but still at a low level (on international standards). 10.9% of the population is able to access the internet due to high costs.
- There are a number of media and press agencies based outside Zimbabwe. These include Zimbabwe Online (South Africa), Zimdaily.com (UK), The Zimbabwe Times (USA), SW Radio Africa (UK), Voice of the People (Madagascar) and Studio 7 (Voice of America, USA).
- The sub-sector is seen as influential in showcasing the other sub-sectors. Primarily, the media plays a role in changing people's perceptions positively towards their local culture and showcasing local cultural products.
- Practitioners in the media sub-sector perceive themselves as independent from the culture sector. This view was expressed by 85% of respondents interviewed.
- The sector lacks adequate skills and resources in communicating effectively on the culture sector. Columns are often gossip and provide more coverage on international artists extracted from the internet.
- Zimbabwe Radio and Television has promoted the consumption of local music, in the past ten years. This growth has been in part influenced by such media policies as the 100% and then 75% local content.
- The media sub-sector benefits from, and benefits other culture sub-sectors. Graphic designers, cartoonists, writers, photographers, advertisers, film makers and musicians provide invaluable input to the media sub-sector.
- The table below shows the number of programmes on national television that cover culture sub-sectors.

[6] *CIA. 2008. World Fact Book: Zimbabwe. July 2008.*

Culture Sub-Sector	Number Of Programmes	Examples
Film (Soaps/ Drama)	5	Small House Saga, Studio 263, Amakorokoza, Estate Blues, Asi Chii Nhai?
Music	5	Prime Gospel Show, Ezomgido, Musik Calabash, Rhythm Unlimited
Cultural Heritage	8	Around Zimbabwe, Dzimbahwe, Amaqhawe, Tiriparwendo, Toringepi, Buried Secrets
Performing Arts	2	Imbube Traditional Dance, Poetry Pot
Visual Arts	0	
Literary Arts	0	

MARKET POTENTIAL OF THE MEDIA SUB-SECTOR

LOCAL MARKET

In terms of circulation, there are two major daily newspapers, The Herald and The Chronicle. In addition, every major city has at least a local paper, e.g., Manica Post in Mutare. There are a number of independent papers available as both dailies and weeklies. They include the Financial Gazette, The Independent, The Standard, The Zimbabwean, The Mirror and The Worker. There are, in addition, six weekly newspapers in local languages, Shona and Ndebele. These are Kwayedza, Chaminuka, Nehanda, Ilanga, Indonsakusa and Umthunywa. Foreign media may also be found on the streets or bookstores. The most popular foreign papers are South African: The Sunday Times, Mail & Guardian, The Star, The Sowetan and The Sunday Independent.

Some smaller towns now have some established newspapers. In Hwange, The Nation is a local paper while in Chinhoyi, two papers; The Telegraph and Makonde Star are the local circulations.

Trends is a local magazine with a circulation of about 50,000 copies monthly. It is one of the most popular magazines and is now an insert in the Saturday chronicle. There are a number of other foreign publications that include The New African, Bona, People, Soul, Your Family and Living and Loving.

The local market is fairly favourable, more often newspapers do not meet the market demand. Foreign newspapers, especially The Sunday Times and Mail & Guardian, are bought for job opportunities as much as the news content. Local newspapers are also sold in neighbouring countries although increased internet access has reduced the number of hard copies sold.

EXPORT MARKET

Zimbabwean television station is available on DSTV. The quality of productions and content, as well as programming, is relatively of lower standard compared to regional and international television stations. The consumption of foreign television is very high in Zimbabwe. In the past eight years, the number of subscribers to DSTV and households with free access to South African television channels via Wiztech and Fortech has increased dramatically. The main reason given in the baseline study for discontinuing with or minimising access to local television was the highly political and partisan content, as well as poor programming content. The number of households with Wiztech could not be ascertained as there is no company issuing licensing or subscriptions. It was estimated that approximately 45% of households in urban areas with access to television sets had satellite television access. In border towns like Victoria Falls, Hwange, Plumtree and Beitbridge, local television reception is unavailable and people rely on external satellite television.

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The implication is high on perceptions of local culture as expressed through music, theatre and other forms. Upcoming artists, particularly in music, generally tend to be so influenced by external music style to such an extent that some songs are either nearly remade in local languages, or the same song is given a slightly different tune and lyrics.

CHALLENGES TO GROWTH IN MEDIA SUB-SECTOR

- Restrictive legal and policy framework preventing entry of new players and free expression by artists, thus stifling creative and performance talent in the various culture sub-sectors and constraining their growth and development.
- There is limited training and capacity in the media to communicate culture related issues, events and programmes.
- Entertainment columns have tended to concentrate more on gossip on artists' private lives than on developing the industry.
- There is limited to no media coverage in some parts of the country. Hwange, Victoria Falls and Beitbridge, among other towns, do not have local radio and television reception.
- Media establishments have strained logistical systems with regards to covering culture events. For example, the organisers of an event should provide transport and lodging to journalists, or alternatively artists may have to send their story and photographs to a newspaper. This practice has exacerbated "cheque book journalism" and conflict among artists.
- Coverage of the culture sector is restricted by barriers to entry, especially policy and costs. Trends magazine covers the entertainment industry especially carrying artists' profiles and gossip. The Herald and The Chronicle periodically review new books, provide updates on cultural events and profiles of artists. The inclusion of City.com as a weekly insert in The Herald on Saturday was a great step in promoting the growth and development of the culture sector.

Chaminuka News, a subsidiary of New Ziana, is a community news establishment serving Mashonaland East. Among other columns, the newspaper has a section dedicated to the arts and culture. However, the paper does not have a reporter with culture orientation and experience, and thus stories in this section often lack depth and analytical perspective. The column thus concentrates on event reporting. Besides, only three reporters are covering the whole province and, as such, less attention is usually accorded to the arts and culture.

"Journalists do not know how to report in the arts. They have no clue on narratives in the visual arts, and as such they cannot do much in promoting your works…if anything, they can bring you down! I can't ever accept an interview with a journalist. To them, our industry is like a past time."
An artist referring to media coverage of the culture sector.

3.4. ECONOMIC CONTRIBUTION OF THE CULTURE SECTOR

The culture sector is a potential driver of economic growth and development in Zimbabwe. South Africa earns approximately US$250million per annum (0.14% of its GDP) from this sector. However, the contribution of the culture sector is often not indicated in national statistics due to the informal nature of this sector, and its interconnectedness with other sectors of the economy.

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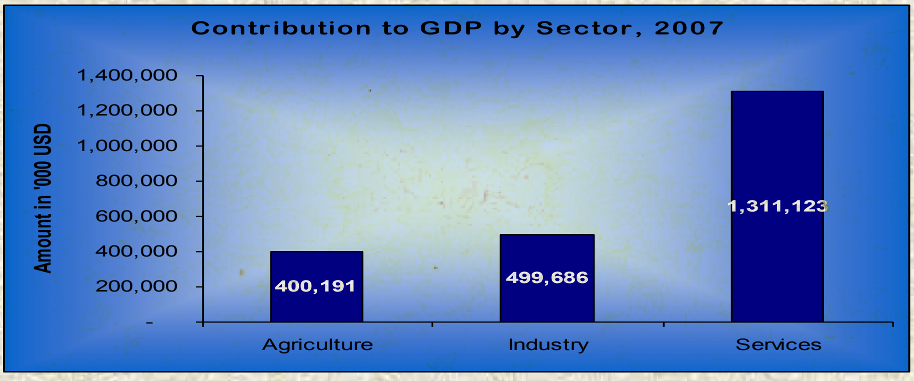
3.4.1. RELATIVE CONTRIBUTION TO GDP OF KEY SECTORS IN ZIMBABWE

The Gross Domestic Product (Purchasing Power Parity) for Zimbabwe for 2007 was US$2.211 billion[8]. Sectoral segmentation (proportion and amount) is given on the charts below:
Department of Arts and Culture. 2006/7 Annual Report.

[7]*CIA, 2008; Central Statistical Office, 2008.*

Figure 9: Contribution to GDP by sector

Figure 10: Contribution to GDP in USD



The culture sector benefits from the tourism industry in Zimbabwe. Evidence from both the culture and tourism sectors place at 15%-20% the proportion of culture sector contributions to the tourism earnings. In 2007, the tourism industry received 2,508,255 visitors and contributed US$365,270,194 (≈17% of GDP)[9] to the economy. Contribution of the culture sector to the tourism industry is estimated in the range of US$ 54,790,529 to US$73,054,038 for 2007.

The tourism industry derives its mainstay from the culture sector, as the largest volume of tourists who visit the country are in pursuit of a cultural experience, including visits to places of cultural heritage (e.g., Great Zimbabwe, Khami Ruins, national museums and monuments). While in the country, tourists are entertained by artists in various sectors, and on departure purchase visual artifacts that they take home. It is these artifacts, sharing of the cultural experiences (photographs and stories) that in fact create a market for Zimbabwean tourism products.

[9]*Zimbabwe Tourism Authority Report. 2007.*

The following findings explain this link between tourism and the culture sector:

1. Cultural heritage sites form a major component of Zimbabwe's tourism industry. Current plans are centred on expanding cultural tourism to cover urban landscape tourism.
2. Advertising tourism in Zimbabwe is conducted through videos developed by the music and performing arts sub-sectors. The making of such advertising materials involves engaging the film sub-sector and graphic artists and other support structures within the culture sector.
3. The hospitality sector within the tourism industry relies on the performing arts sub-sector for providing a warm welcoming effect to tourists and entertainment in the evenings. Visual art products are a key display feature at hotel receptions, gardens and rooms, and a major determinant to choice of hotel.
4. Over 90% of tourists purchase at least a single piece from the visual arts sub-sector, as memory of their African experience (souvenir).
5. The culture of a local people is a major attraction for tourism, and albeit for other industries. Businesses and tourists would visit a country because of the "warm and friendly" experience they had.
6. Of the 2,508,255 visitors received in 2007, 17,005 of them were on educational visits, a large proportion of which are related to our cultural heritage sites. This implies a significant contribution of the culture heritage sector to the tourism receipts.
7. A total of 11,308 tourists identified shopping as their purpose of visit. There was no detail recorded as to what was purchased, but there is a likelihood that cultural products were also purchased.
8. 11,609 room nights were sold in 2007. Of these, 14% were occupied by tourists. A significant proportion of these were in key tourism resorts such as the Victoria Falls.

CONTRIBUTION BY SUB-SECTOR

The number of artists and art practitioners employed by sub-sector and relative contributions to GDP by sub-sector[10] , based on secondary data used in this study, is given on the chart below:

Culture Sub-Sector	Employment Contribution	Foreign Currency Earnings (Million USD)	Total Global Contribution (Million USD)
Music (includes production, performances, sales, training, etc.)	25 (11)	10 (5)	20(16)
Literary (includes books, publications, marketing and distribution, etc.)	2*	0*	2*
Visual (includes sculpture, photography, paintings, handicrafts)	65 (80)	70(60)	70(80)
Theatre (includes training production, marketing and distribution)	3 (5)	(0)(0)	3(5)
Dance(includes training, production, marketing and distribution)	4(3)	2(1)	3 (3)
Film and Television (include production, marketing, advertising and distribution	1(1)	.5(1)	.5(1)

[10]*The table above is a result of a consultative process involving previous studies (Kazunga, L. November, 2006. Enhancing the Economic Contribution of the Arts and Cultural Industries in Zimbabwe, and NACZ. 2007. An Assessment of The Contribution of Arts and Cultural Industries to Economic Development in Zimbabwe: A Research Report by Skoliwe Buhera) and key informant interviews.*

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3.4.2. SOCIAL CONTRIBUTION OF THE CULTURE SECTOR TO THE ECONOMY

- The growth of tobacco production in Zimbabwe is much attributed to the input of migrant workers from regional states which include Zambia and Mozambique. The new labour pool introduced diversity to the culture sector in Zimbabwe. The Malawi traditional dances on farms (zvigure) provided entertainment that kept workers motivated and less homesick, hence their effectiveness in the agricultural revolution of Zimbabwe. The same can be extended to the mining sector. In addition, the local language, music, visual arts, and other sub-sectors were all influenced to variable extents. Some of the leading musicians in Zimbabwe are descendants from Malawi, and what makes their music more appealing is the fusion of local music with the regional influences.
- Tourists do not only come to learn about our culture, they also impart their culture on the local people through their short or prolonged stays in Zimbabwe. Tourists also bring with them different attire, mannerisms and language. Preferences on various culture sector goods and services shapes the production component and packaging of the local culture sector.
- The culture sector, in particular the visual arts, uses waste products from various sectors of the economy, particularly agriculture and mining. The culture sector is highly cost effective.

3.4.3. CHALLENGES IN CALCULATING THE CONTRIBUTION OF THE CULTURE SECTOR

The baseline study team faced a number of challenges in estimating the economic contribution and size of the culture sector in Zimbabwe. They include the following:

1. Lack of existing statistical data in various government institutions and unwillingness to share financial data by practitioners in the private sector in fear of exclusion from potential benefits. In some cases, the data available was quoted in Zimbabwean dollars and, given hyperinflation and revaluing of the local currency, the actual value (in US$) could not be calculated accurately. CSO data is based on 2002 census.
2. Data on various indicators, including those relating to economic contribution, has not been collected due to lack of resources for the process or non-realisation of the importance of such statistics, and inadequate technical capacity in undertaking such tasks.
3. Fluctuations in the local currency tended to influence negatively the capacity to recall earnings or equate same to international equivalents. Data could not be easily collated.
4. Prices of goods and services were appreciating even in US dollar terms.
5. Artists are involved in more than a single sub-sector. Exclusion or inclusion errors may be introduced into the calculation, where income levels and source are not appropriately recorded.

A sculpture priced at Z$200 billion (US$200) on 1st June 2008 was only priced at Z$650 billion on 31st June (U$26), instead of Z$5 trillion (equivalent of US$200 on 31st June).

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3.5. SOCIAL DIMENSIONS IN THE CULTURE SECTOR

3.5.1. GENDER

Women constitute an approximate 30% of total number of people depending on the culture sector for livelihoods. Concentration by gender varies with sub-sector, and this is a function of social perceptions, skills transferable from other sectors and age versus household specific gender roles. The following table summarises key findings:

Culture Sub-Sector	Artists Roles By Gender	
	Male artists	**Female artists**
Visual Arts	Sculpture, weld art, paintings, carving. Proportion male: 65%	Embroidery, bead art, crotchet art, e.g., doilies, fashion design. Proportion female: 35%
Performing Arts	Lighting, directing, performing Proportion male: 60%	Performing, make-up artists, wardrobe. Proportion female: 40%
Music	All music genre, dancers, backing vocals, promoters, studio managers. Proportion male: 75%	Gospel music, backing vocals, dancers. Proportion female: 25%
Film	Actors, film crew, script writers, directors, producers, promoters. Proportion male: 55%	Actresses, few film directors. Proportion female: 45%
Cultural Heritage	Curators, heritage officers, tour guides. Proportion male: 60%	Curators, heritage officers, tour guides Proportion female: 40%
Media	Journalists, reporters, graphic designers, editors. Proportion male: 68%	Journalists, reporters, some graphic designers. Proportion female: 32%
Literary Arts	Writers, poets, editors. Proportion male :75%	Writers, poets and editors. Proportion female: 25%

Generally, women within the culture sector play less influential roles in the various establishments. In the performing arts sub-sector, women are in leadership in 10-15% of establishments. In Hwange, only two out of 30 performing arts groups are managed by women. However, it is important to note that women have made significant contributions to the sector. For example, the successful Tanyaradzwa movie was directed by a woman. Zimbabwe has also produced world leading women writers and musicians.

The relatively low proportion of females in the culture sector is explained by a number of factors:

1. Household roles limit time availability for involvement in activities related to the culture sector, some of which are executed at night. The unsupportive social systems and stereotypes related to women performing at night functions or travelling days on end jeopardise chances for marriage, and thus an early age of terminating careers in the culture sector.
2. There is a lack of suitable female role models who have managed to balance a career in the culture sector and family. The pursuit for civil liberties has led to perceptions of leading female artists as perhaps too liberal and expressive and not suitable as “good wife” material.
3. Women perform less well in science subjects, and are less likely to pursue technical training and careers in the culture sector.
4. Lowness of incomes in the culture sector compared to vending or petty trade reduces appeal and justification for long hours and absenteeism from home.
5. Incidents of women being taken advantage of and sexually exploited in the culture sector, particularly in the film, performing arts and music sub-sectors, hinders willingness of men to allow women into the various culture sub-sectors.

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THE GIRLS CAN DO IT!!

“As women, we are not worried about the number of women in the culture sector; we are more concerned about quality of the few women in this industry. Unfortunately, we do not have credible role models and we fight so much within our groups. Yes, I agree there are some gender gaps. We have very few women directors, but this inequity is inherited from previous generations where women had limited opportunities for school, and those who went opted for non-technical subjects or courses.”

“Gender issues are not adequately addressed in the culture sector. For example, a male director will not understand it when you say you have to leave early because your child is not feeling well, or you cannot dance because you are on (periods). We are not saying male directors are bad, they simply do not understand us well enough. On the contrary, women directors are the worst. They tend to have this mean attitude, this super woman attitude that makes life more miserable for other women artists. Sometimes, I think, we are better off with male directors.”

“Arts and culture are viewed lowly in our society. Women in the culture sector may be perceived as loose. It’s true that sometimes some women are pushed by their vulnerability to accept sexual harassment in order to get some roles. Besides, incomes are low to justify our absence from home to our husbands.”

“There are a number of challenges facing women in the culture sector. You see, men are generally more aggressive than women in seeking funding. I think we need a gender policy related to the funding of the culture sector. Donors could say funding will be made available to groups where women are present and with representation in management. We need a gender policy for the culture sector.”

These views were expressed by some of the women interviewed in a focus group at Nhimbe Trust premises where they were practising their singing.

KEY CONSIDERATIONS FOR ENHANCING PARTICIPATION OF WOMEN IN THE CULTURE SECTOR

- The regulatory authority should develop a clear gender policy to deliberately promote women in the culture sector.
- Promotion and strengthening of linkages and partnerships with organisations funding women in small and medium enterprises so that women in the arts and culture also benefit.
- Promotion of qualified and technically competent women in and into leadership roles in the culture sector. Deliberately funding organisations with at least a woman in a functional leadership role could be one approach.
- Facilitation of establishment of women’s associations in the culture sector and thus a platform to collectively discuss and air issues relating to their working environment.

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3.5.2. COMMUNITY DEVELOPMENT

The culture sector is contributing to community development through a number of interventions:

1. Raising awareness on topical political issues such as human rights and electoral processes (voter education); and social challenges such as HIV and AIDS, human trafficking and gender based violence.
2. Providing psychosocial support to orphans and other vulnerable children and people living with HIV and AIDS.
3. Providing training in community health and hygiene, sustainable use of natural resources, health and safety at the workplace, and child protection.
4. The culture sector provides employment opportunities for youths and keeps them, to some extent, away from drug abuse and sexual activities.
5. Edu-dance is a concept that has been used in the past, most prominently by the Dance Trust of Zimbabwe, as an entry point for teaching of children with learning difficulties and those with disabilities (mental and physical).

In the above interventions, arts establishments in various sub-sectors (music, film, performing and visual arts), work mainly with NGOs, private companies and government departments. In their involvement as partners in such initiatives, there are a number of challenges faced. They include:

1. Non-payment for performances and unfair terms of engagement in which fees paid are determined by the client. Some artists have weak contract negotiation skills, and given the country's economic challenges, minimal standards in terms of fee rates have been difficult to develop and implement.
2. Support provided to artists is usually low, with transport (to attend functions) and t-shirts being the common form of support. NGOs using the arts for training and advocacy may not have support for the arts on their budgets.
3. Organisations which work hand in glove with culture groups ironically do not always promote local cultural products. Their offices are often decorated with imported, mainly Chinese, visual arts products.
4. Clients and funders tend to influence the script or content, thus stifling creativity and compromising product quality.

In spite of these challenges, artists viewed such opportunities to perform as useful platforms for learning, showcasing talent and marketing.

3.5.3. YOUTH IN THE CULTURE SECTOR

The youths comprise an estimated 40% of the total number of people employed directly in the culture sector of Zimbabwe. Most of the current artists in the sector in fact entered the sector as youths. The importance of the culture sector to the youths in Zimbabwe can be best understood from the context of high unemployment rate (80%), high school dropout levels, and an increasing number of orphans and other vulnerable children, especially given the prevailing weak health delivery system and high HIV and AIDS-related deaths. The following findings were highlighted across sectors:

1. The culture sector presents an important potential livelihood for many unemployed youths. In addition, it diverts attention away from risky behaviours such as drug abuse and crime.
2. There is a lack of specific and relevant training for youths in the culture sector, implying a mismatch exists between the skills required by industry and those available among youths.
3. The Government and other sector players have established a number of formal training facilities to build capacity at various levels. The Ministry of Youth, Gender and Employment Creation has had a focus of increasing opportunities for self-employment in the cultural industries.
4. Both the Zimbabwe Cultural Policy and the Youth Policy Document aim at ensuring effective participatory youth development and provision of technical and financial resources. The culture sector has been identified and used as a key avenue for enabling attainment of this objective.

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5. Literacy levels among the youths are very high in Zimbabwe. However, the appropriate environment for employment in the culture sector has not been equally supportive.
6. Information communication technology skills are lacking or weak in most cases among youths in the sector.
7. The culture sector reflects the status of the social and political environment, and may thus be sensitive. Youths in the culture sector may fail to access funds from donors, given political risk linked to some proposed projects.
8. Partnerships between the arts education institutions and industry have not been fully exploited, with graduates from various institutions lacking industry experience or adequate skills to establish their own viable enterprises.

3.6. ARTS EDUCATION

3.6.1. BACKGROUND OF ARTS EDUCATION IN ZIMBABWE

Prior to independence in 1980, the majority of Zimbabweans lacked opportunities and facilities for quality secondary education. Education in the colonial era mostly ended at primary school level. Within this context, the education system was essentially designed to create an individual who could read, write and add numbers, and thus minimal attention was given to arts education. Aspirations of students were towards achieving white collar careers in education, health and agriculture extension. This reinforced the societal stereotypes that looked down upon the culture sector. For the colonial government, suppressing education in the arts and non-promotion of the African culture sector had the benefit of reducing revolutionary tendencies.

At independence, arts education was mainly concentrated in formerly white private “Group A” schools, which tended to have superior resources and trained teachers when compared to their mission and government-sponsored counterparts. Thus, arts education was provided to wealthy urban schools and taught mostly to white students. However, even within this context, it was often used as a dumping ground for non-achievers and girls in particular (who had few career options available to them outside of marriage). As a result, art was considered an expensive and non-cademic subject in former Rhodesia.

The situation did not improve after independence. Art still retains a poor image and has not expanded into mainstream education. However, the country has a rich artistic heritage, and informal art education has developed to provide sculptures and crafts for the tourism industry. The Government introduced art in primary education but has been unable to provide the necessary financial backing to implement the scheme.

Significant interventions have been made in improving arts education in Zimbabwe. In the past 10-15 years, educational institutions have experienced considerable growth and positive change. Such institutions as the University of Zimbabwe, Midlands State University, Great Zimbabwe and the Chinhoyi University of Technology are now offering programmes at degree level targeted at the culture sector. However, only about 5% of the schools in Zimbabwe are offering art as a ZIMSEC examinable subject. Although taught in most schools, the arts are often viewed and practised as extra-curricular subjects with minimal support for continuation after school.

Arts education has evolved to include manpower development training through art teacher training programmes. The content of training and quality of graduates from the various arts institutions has been influential in changing societal perceptions of culture-based careers.

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3.6.2. ARTS EDUCATION INSTITUTIONS IN ZIMBABWE

Arts education in zimbabwe falls within three main categories:

1. Formal education curricula training in schools and universities
2. Vocational training
3. Informal or hands on training

The main attitudes and perceptions identified with regard to arts education were:

1. Artists who had received formal training and qualification tended to pursue a more business-like and professional approach to the arts, and had higher income prospects.
2. Entrepreneurship skills were given less attention in arts education institutions (formal, vocational and informal), and thus graduates lacked business management and marketing acumen.
3. Qualifications (certificates, diplomas and degrees) in the culture sector worked to dispel societal stereotypes that perceived the arts as "something for the uneducated". However, even at university level, students in the fine arts were regarded lowly by their colleagues in other faculties on the basis of misconceptions that art programmes were less challenging.
4. Art practitioners with qualifications found securing employment outside the country easier than their informally trained colleagues. However, previous work and profile of artist to include samples of work done were more important. For informally trained artists, the mentor's name and reputation were more critical.

3.6.3. SITUATION OF ARTS EDUCATION IN ZIMBABWE

The baseline study sampled arts education institutions at different levels to include vocational training institutions, colleges and universities. Arts education in this section encompasses the fine and performing arts, visual arts, music, literary arts and other culture sector sub-sectors. The following findings emerged:

1. Art is an examinable subject up to "A" level. More former Group B schools are taking on art as a subject. Music is also now an examinable subject at Ordinary level. Commitment and support for the art subjects depended on the headmaster's attitudes toward the arts.
2. Talent in the arts is often discovered late, especially in the lower income sections of the community because of limited exposure opportunities (e.g., tools and instruments not readily available, limited exposure to festivals and events or fewer touring opportunities).
3. There is limited teacher capacity for arts education. Resources for teaching across levels are often unavailable due to high costs associated with purchasing.
4. Students in formal art training institutions often lack opportunities for industry exposure and receive limited training in such areas as business management and entrepreneurship. This means that they may not find suitable employment or self-employment opportunities.
5. Among the various sub-sectors, the literary arts is one that has had limited chances for development, besides studying literature at schools level. Writers clubs are concentrated in urban areas and information on national or regional international essay competitions is often unavailable.
6. The culture sector is often not represented in careers guidance days for school and university students. This minimises opportunities for learning on prospects within the culture sector.

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3.6.4. PROFILE OF ARTS EDUCATION INSTITUTIONS IN ZIMBABWE

A number of institutions, programmes and projects have been implemented in Zimbabwe for the purpose of arts education. A sample of arts education institutions were captured in this study for the purpose of identifying arts education challenges for Zimbabwe.

1. Midlands Academy of Music

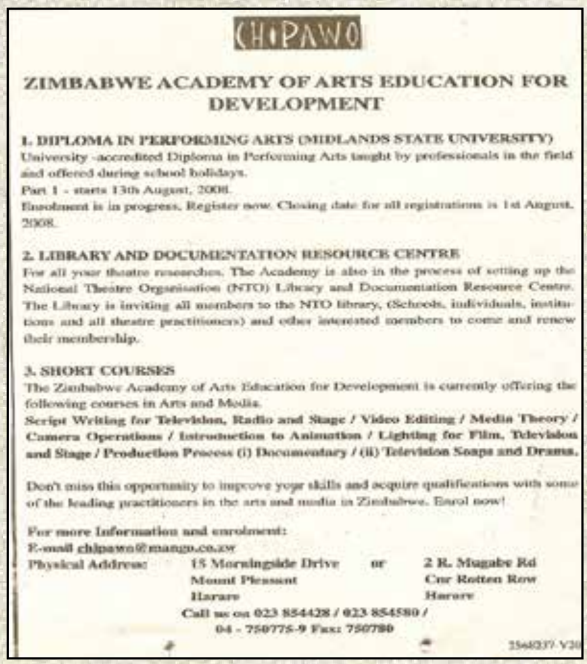
The Midlands Academy of Music, which offers diplomas in music, was established in 1958 and operated as a private institution. From 1978 to 1986, the Academy operated as a welfare organisation, which was later registered as an academy. In June 2001, the Academy was formally registered with the Ministry of Higher Education and Technology.

The Academy offers two year full time and annual part time courses. The part time courses are designed to meet the needs of artists and people from all walks of life. Theoretical lessons and training on use of musical instruments like marimba, guitar and piano are provided. There is adequate capacity to provide training in saxophone, trumpet and drums, but the institutions is not adequately resourced in these wind instruments.

The institution lacks a functional marketing strategy due to budgetary constraints. There is also the challenge of maintaining enrolment figures. The number of drop-outs has been exacerbated by high fees charged. The current 2008 enrolment is eight, six of whom are female. Of these, there is only one female student and four male students in the first year; the rest are in the second year.

2. Children's Performing Arts Workshops (CHIPAWO)

CHIPAWO is an arts education for development and employment institution founded in 1989 by Robert McLaren and Stephen Chifunyise, a playwright. With an affiliation to the Zimbabwe Association of Theatre for Children and Young People, the programme operates in over 70 centres in Bindura, Chitungwiza, Domboshawa, Harare and Marondera, and targets young children from the age of three up to 18 years. The key areas and activities covered include singing, dance, playing music, acting and making videos and television programmes. Through playing and learning together, the project strengthens communication and confidence in the young artists, preparing them for future roles in the culture sector. CHIPAWO also works to address some of the key issues in social welfare and child development. Some of the programmes undertaken by CHIPAWO include Bringing Chipawo to More Children, an up-scaling initiative of current work to cover rural areas. Mwana Anokosha (The child is precious) focuses on mainstreaming the rights of the child while The Challenged Programme works to engage physically challenged persons in the arts, in particular considering their vulnerability to various forms of abuse. This programme has managed to engage St. Giles Rehabilitation Centre in the arts education programme. The core programme at CHIPAWO is the Arts Education for Development and Employment Programme. Through this programme, CHIPAWO targets infants and youths for academic, physical and cultural education in the arts. The programme title stems from the organisation's realisation of the liberating, empowering and creative potential of the performing arts.



3. Zimbabwe International Film Festival Trust (ZIFFT)

Established in 1998, ZIFFT runs four main programmes based on a vision to develop the film industry in Zimbabwe: the annual Zimbabwe International Film Festival, the Short Film Project, the Outreach2Educate programme and the activities around the Resource Centre at the head office in Kensington, Harare. The programmes are geared at exposing audiences to the medium of film as a communication tool, building new audiences and providing skills training for mainly young filmmakers some of whom go on to attend the local film school (ZIFTESSA) while other graduates get employed or further their studies abroad. The outreach programme targets children from underprivileged backgrounds with the aim of exposing them to the various facets of film making. One of these projects, which has since been discontinued due to lack of funding, is "Kids with Cameras", where children were given disposable cameras and went around taking pictures which were developed into postcards and posters sold to finance their school fees. The Trust's activities are still confined to Harare and Bulawayo due to lack of resources.


ZIFTESSA

The Zimbabwe Film and Television School for Southern Africa (ZIFTESSA) is inviting applications from qualified men and women who wish to train as filmmakers in a two-year diploma programme in 2008-2010. Courses on offer include the following:-

- Animation
- Cinematography
- Directing
- Post-Production
- Producing and Production Management
- Scriptwriting
- African Aesthetics
- African History
- AfricanTexts and Symbols
- Film Theories
- Film Traditions

Applicants for the two-year diploma programme should have one or both qualifications stated:
'O' Level passes with credits in 5 subjects [illegible]

4. Dzepfundze Trust

Dzepfundze Trust was established in 2001 as a cultural movement targeted at orphans and vulnerable children. Currently, the Trust has a membership of 700 children. The model of the programme is designed around setting up clubs at schools around Murehwa and Uzumba-Maramba Pfungwe, using various elements from local culture in order to mould the targeted children into responsible performing and visual artists.

The programme nurtures talented young artists to ensure they can sustain their livelihoods from the various cultural activities they are engaged in. Beyond income generation, the programme addresses the psychosocial challenges facing these children and prepares them to effectively deal with their plight, as opposed to resorting to street scavenging and absconding from school. At the moment, pupils are not producing goods for the market. Children have been trained in making sandals from tyres, among other skills.

5. Music Crossroads

The project trains youth under 25 years of age in music. It involves training and nurturing youth from grassroots level until they graduate to provincial level. Training workshops are conducted at provincial level and culminate in national workshops and competitions. The winners then compete at regional level and the winners get sponsorship to tour international destinations. The programme involves over 100 youths per province every year.

A number of now successful artists who include Progress Chipfumo, Bongo Love and Liyana have been nurtured through this programme. They have toured Sweden, Denmark, USA, Dominican Republic, Europe and made names for themselves, and are earning a living from the industry.

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6. Amakhosi Academy

The institution offers training in film and television production, music, dance, theatre and arts administration. Their programmes run for two years, leading to an attainment of a certificate or diploma. They also offer short courses for three to six months, basically covering theory and discussion only, due to limited time. The centre also runs a coaching and mentorship programme on a one to one basis, focusing on an individual's area of choice. The objective is to assist the individual by working with them from the concept stage to final product.

7. Imbongi

The institution uses performing arts as a developmental tool, and focuses on channelling resources and facilities towards the provision of platforms for young artists. Imbongi offers training programmes in keyboard, guitar, resources for studio rehearsals, studio recording, professional advice, demo recording, international workshops, tours and cultural exchange programmes.

8. State universities

State universities provide training in various culture sector disciplines such as Arts and Design, minority languages and Ethnomusicology, enabling students to gain a theoretical underpinning to face the diverse practices of arts and culture, and to develop a community consciousness. Examples of courses offered at universities are as follows:

Midlands State University: Offers ethnomusicology which gives an insight into the sociological, psychological and ethnomusicological aspects of music, as well as its interaction with the other elements of culture. It also provides an in-depth understanding of the musical traditions of Zimbabwe, Africa and other cultures of the world, including jazz and popular music, as well as the different challenges pertaining to the music industry and any other music-related fields.

Chinhoyi University of Technology: Since 2003, the University has been providing undergraduate degrees in the culture sector. Among other programmes, the University offers the Bachelor of Technology Degree in Arts and Design. This programme was introduced in response to the needs of the industry in relation to graphic design, film and video, photography, industrial design and textile design. Twenty-four courses are being offered within this four year programme. The fine arts component was offered to provide a qualification for artists, including staff in art galleries. A Bachelor of Technology Degree in Clothing and Textile was introduced in 2007 as the first fashion and design programme in Zimbabwe.

Great Zimbabwe University: The University has a fully fledged department where students are trained in music, performing arts, management and marketing. Students get exposure to regional and international markets and receive technical and material support. The University is offering a degree programme in Performing Arts. The University also offers a degree programme in minority languages as a way of promoting our heritage.

University of Zimbabwe: The Department of Theatre Arts offers a three year degree programme enrolling about 100 students involved in theatre arts per year. Over 95% of students in this department are youths. The programme offers training in arts management, performing arts and business development. This is one of the few programmes offering training in arts management.

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9. Mzilikazi Arts and Crafts Centre

Zimbabwe's creative heritage is also celebrated at the Centre founded in 1963 to train latent local talent. A museum displays painting, sculpture and ceramics by the several hundred full and part time students. Situated just out of town, off the Old Falls Road, the Centre today boasts of a commercial pottery business, providing jobs for more than 70 people. Visitors can choose from a wide selection of skilfully crafted sculptures, basketry, pottery, beadwork and woodwork, all done by local people.

10. Jenaguru Arts Centre

Jenaguru Arts Centre is the only arts centre of its kind in Zimbabwe that promotes the many genres of traditional Zimbabwean music and dance by teaching, practising and mastering, thereby promoting their meaning, transmission and preservation. The Centre is developing an auditorium with a capacity of 300 people, video and DVD editing studio, recording studio, office, exhibition space and other facilities. The Centre gives artists free rein to create and manage their own work.

11. Siyaya Arts

Siyaya was established in 1989 as NASA (Nostalgic Actors and Singers Alliance). The institution was rechristened Siyaya on its 10th anniversary. Siyaya means "on the move", a literal description of the journeys that the members have embarked on all over the world. The institution teaches traditional tales through music, song and dance.

12. Inkululeko Yabatsha School of Arts (IYASA)

This school of arts for the youth aims at promoting the best interests of the youth mainly through dance. IYASA is committed to the empowerment of youths through the implementation of programmes aimed at increasing their access to resources, training and information. The school is located in the high density suburb of Entumbane in Bulawayo. This suburb, however, is central to other suburbs such as Matshobana, Emakhandeni, Njube, Cowdray Park, Luveve and Mpopoma. These suburbs are therefore the catchment areas for the school of arts. The school of art is currently self-funding as it finances all its projects.

13. Kwanengoma College of Music

The college was established in 1961 as a department of the Rhodesian Academy of Music in Bulawayo. The department was moved to the United College of Education in Bulawayo, and teaches music literacy, arranging and performance of African music. Kwanengoma has been manufacturing traditional musical instruments including marimba, and it is through the institution that marimba has been popularised and diffused in the country.

14. Black Umfolosi

Established in 1982, this multi-discipline performing arts group is based in Bulawayo. Black Umfolosi is much more than a performing group; they are active in training others, particularly the youth, in dance and voice. They identify and develop upcoming groups and mentor them along their path to success. They provide workshops and artist-in-residence programmes in dance, voice, theatre, costume design, poetry and mime, and also address various issues affecting society today.

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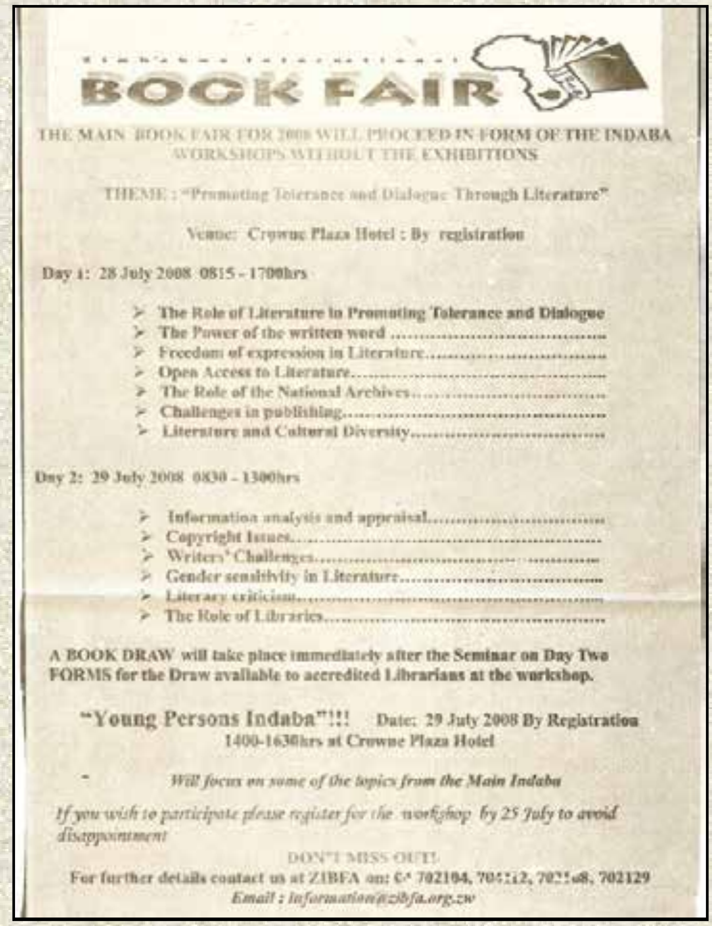
15. Arts festivals

Arts festivals complement arts education in training artists and showcasing talent. Within each sub-sector, there are festivals specifically dedicated to sub-sectoral promotion. Some of the most prominent festivals include the Intwasa and Ibumba in Bulawayo, Shangano in Matabeleland North, Rainbow Festival in Matabeleland South, Chimanimani and Manica Fest in Manicaland, Dzimbahwe in Masvingo, the International Images Film Festival (IIFF), Zimbabwe International Film Festival (ZIFF) and Harare International Festival of the Arts (HIFA). During the festivals, there are training workshops that run concurrently with performances.

The following figure provides details of the programme for the 2008 Book Fair in Harare.



BOOK FAIR

THE MAIN BOOK FAIR FOR 2008 WILL PROCEED IN FORM OF THE INDABA WORKSHOPS WITHOUT THE EXHIBITIONS

THEME : "Promoting Tolerance and Dialogue Through Literature"

Venue: Crowne Plaza Hotel : By registration

Day 1: 28 July 2008 0815 - 1700hrs

- The Role of Literature in Promoting Tolerance and Dialogue
- The Power of the written word ....
- Freedom of expression in Literature..
- Open Access to Literature..
- The Role of the National Archives..
- Challenges in publishing..
- Literature and Cultural Diversity..

Day 2: 29 July 2008 0830 - 1300hrs

- Information analysis and appraisal..
- Copyright Issues..
- Writers' Challenges..
- Gender sensitivity in Literature..
- Literary criticism..
- The Role of Libraries..

A BOOK DRAW will take place immediately after the Seminar on Day Two FORMS for the Draw available to accredited Librarians at the workshop.

"Young Persons Indaba"!!! Date: 29 July 2008 By Registration
1400-1630hrs at Crowne Plaza Hotel

Will focus on some of the topics from the Main Indaba

If you wish to participate please register for the workshop by 25 July to avoid disappointment

DON'T MISS OUT!

For further details contact us at ZIBFA on: 04 702104, 704[illegible]12, 702[illegible]08, 702129
Email : information@zibfa.org.zw

3.6.5. CHALLENGES TO ARTS EDUCATION

1. Limited links between arts education and industry. Furthermore, talented art students often lack mentorship after completing school.
2. Lack of financial and material resources for both teaching and learning.

3.7. FINANCING THE CULTURE SECTOR IN ZIMBABWE

58% of respondents identified inadequate financing of the culture sector as the main challenge to its growth and development. At sector level, resource availability for implementing sector level plans, lack of adequate capacity, and inadequate markets for culture sector products (and its impacts on lack of adequate operational finances) are key gaps where sector financing would add value.

3.7.1. KEY CONSIDERATIONS IN FINANCING THE CULTURE SECTOR

The baseline scenario in terms of financing of the culture sector is characterised by the following:

1. The level of government funding of key institutions involved in regulating and coordinating activities in the culture sector constrains policy and strategy development, and implementation is low at project baseline.
2. Funding from Government and private sector has been inadequate to cover operational costs, thus negatively affecting sector growth and development.
3. Protracted macroeconomic challenges in Zimbabwe are reducing profitability of private sector companies, thus reducing financial resources available for financing promotional activities.
4. Artists across sub-sectors generally lack technical skills in developing proposals to solicit funding. A significant proportion of artists and art practitioners run their operations as leisure activities.
5. There is no clear sectoral growth and development strategy. This report guides priority focus areas.
6. Artists and art practitioners are not well supported by financial institutions and banks due to lack of adequate information that reflects business feasibility and profitability. Funding is often derived from own resources.
7. Most financial institutions require collateral which most artists do not have.

Funding needs and nature of support varied across the sub-sectors. Across all sub-sectors, financing training for capacity building was identified as a major gap. In addition, the need to financially capacitate various institutions to function effectively and set up linkages for promoting production, packaging and promotion as well as strengthening support industries were identified as important.

CHALLENGES RESULTING FROM LIMITED FINANCING

Challenges related to poor financing in the culture sector were common across sub-sectors. They included the following:

1. Lack of capacity to purchase materials and inputs for use in product development, packaging and marketing.
2. Low capacity to retain trained and experienced staff in arts establishments and support industries, leading to falling quality standards.
3. Inadequate resource availability to facilitate awareness and training programmes and monitor implemented projects.
4. Limited funds to conduct meaningful research that informs sector strategies and policies and collection of data important for benchmarking progress.
5. Poor maintenance of physical infrastructure which renders facilities unsuitable for use by practitioners, thus reducing economic value.

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3.7.2. KEY INSTITUTIONS FINANCING THE CULTURE SECTOR

Financing of the culture sector at project baseline is characterised by weak coordination within the sector, with various partners working directly with target establishments of choice. As such, actual volumes of funding could not be consolidated, while some implementing organisations were not willing to provide figures. From the corporate sector, Delta company has been outstanding in its support and has supported events such as Chibuku Road to Fame, Neshamwari Festival and Jikinya Festival. HIFA, ZIFFT and IIFF have over the years enjoyed support from embassies, banks as well as the corporate sector.

Institutions providing financial support to the culture sector fall within the categories of donors and foreign embassies; NGOs, and trusts; private sector companies and Government. Institutions supporting the culture sector include UNESCO, British Council, HIVOS Foundation, Africalia, and Alliance Francaise as well as the Culture Fund.

3.7.3. THE ROLE OF THE CULTURE FUND OF ZIMBABWE TRUST

The Culture Fund was established in 2006 with funding from the Swedish International Development Agency (Sida) to address the challenge of inconsistent funding of the culture sector in Zimbabwe. The Culture Fund contributes to the growth and development of the culture sector through provision of financial and technical support to cultural practitioners, institutions and activities across all sub-sectors. Through provision of support, the overarching goal is to create wealth, foster gender equity and promote socio-economic development.

In executing its mandate, the Culture Fund is guided by the following set of values:

- Integrity
- Efficiency
- Accountability
- Transparency
- Equity
- Creativity, boldness and innovation
- Non-partisanship
- Quality

In line with executing its mandate, the Culture Fund approved grants for a total of 125 projects across all sub-sectors in ten provinces in June 2008. A total of Z$3,826,301,016, 274,150, 00[11] (USD300 000) was issued in grants. US$50,000 was allocated to performing arts musical instruments. The distribution of funding by province and sector is shown on the table below:

Table 18: Approved projects by province

Province	**Number Of Projects**
Bulawayo	21
Harare	24
Masvingo	10
Midlands	7
Mashonaland East	8
Mashonaland Central	8
Mashonaland West	7
Manicaland	14
Matabeleland South	10
Matabeleland North	16
Total	**125**

[11] *Culture Fund website: www.culturefund.co.zw*

Table 19: Approved project by sub-sector

Sub-sector	Number Of Projects
Combined	1
Cultural heritage	27
Cultural industries	19
Film, audio visual and multimedia	7
Fine arts and crafts	30
Literature and languages	11
Performing arts	30
Total	**125**

Table 20: Approved projects by gender

Gender	Number Of Projects
Male	26
Female	31
Combined	30
Total	**125**

Table 21: Approved projects by institution

Institution	Number Of Projects
Festivals and events	18
Schools	9
Institutions, associations and unions	22
Ordinary projects	34
Groups	42
Total	**125**

The Culture Fund selection process is multi-stage, progressing from provincial (for set culture sub-sectors) to national level section, based on proposals prepared by practitioner and evaluated by committees selected to include representatives from key sub-sectors.

Stakeholders identified the following issues pertaining to the quality of funding provided by the Culture Fund:

- The hyper-inflationary environment in which Culture Fund operates limits the benefits from the grants provided where disbursement of funds is delayed. Some beneficiaries interviewed mentioned that although they had been awarded grants to assist them in their work, by the time the money was availed to them it was barely enough to meet the transport costs for collection.
- Beneficiary monitoring is limited by inadequacy of resources by key culture sector stakeholders. There is lack of clarity on the operational monitoring strategy. Beneficiaries and non-beneficiaries alike expressed concern at no follow-up having been made on grant recipients, exposing the funding to abuse. Minimal monitoring had in some cases led to diversion of grants to other purposes, e.g., seed purchasing.
- Although most artists were aware of the proposal application form, they argued that the forms were too technical, thereby presenting challenges in terms of writing up of proposals. Further, artists argued that evaluation of grant recipients on the basis of a proposal was ineffective as some artists would have their proposals professionally prepared. A good proposal did not guarantee performing or creative talent.

- The proposal selection process has not clarified the expectations of Culture Fund for a winning proposal. Complementing the proposal with an interfacial interview with prospective beneficiaries was viewed by some respondents as critical in building relationships that would ensure mutual accountability.
- It is a requirement that proposals should include, where available, media cuttings on the applicant. Some areas are underserved by the media and do not get the opportunity to showcase their work.
- There was skepticism on the selection process by some artists. There were indications of uncertainty on what happens to unsuccessful proposals. Some artists interviewed said they had seen ideas similar to theirs being implemented by other artists elsewhere and were not confident that these were genuine coincidences in similarity of project concepts.
- Interviews with various stakeholders indicated that there is a need to review targeting criteria, i.e., who benefits from the Culture Fund. The key question is: should the Culture Fund be supporting individuals and groups, given the high emigration rate of artists, or should the concentration be on institutions? Analyses indicate presence of two models for developing the culture sector: the Culture Fund could support the building up of institutions and partnerships to set up the favourable framework and environment that would support artists and practitioners. This could encompass training of artists, policy review, strengthening support industries, promoting local cultural goods and services, etc. A well organised industry will thus create prospects of development of these artists and enhance their economic and social contributions.
- A recommendation on the need to support organisations from which higher impact at sectoral level could be achieved was made.
- Funding within the sector has been inconsistent leading to non-continuity of projects and reduction in impact levels attained.

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4. CONCLUSIONS

This section provides a brief overview of the key conclusions of this baseline study. Key conclusions have been detailed in the main report in specific sections.

- A key conclusion at sector level is that data and information on the culture sector is poorly documented due to lack of a centralised information and knowledge management system.
- The actual contribution of the culture sector is masked within other sectors of the economy like tourism, due to non-segregation of data.
- The level of awareness and appreciation of the socio-economic value of the culture sector is low, at national level.
- The arts are not adequately mainstreamed in the education system, and the approach has been more focused on livelihood and economic benefits than perceiving the arts and culture as a way of life.
- Consumption of local culture sector products is inclined towards foreign tourist sales. Locals exhibit limited appreciation of own art, and lack of disposable income has further exacerbated this challenge.
- Government financial support to the sector has been inadequate to ensure meaningful and sustainable sector growth.
- Zimbabwe's cultural policy does not contain strategies or actions that bring forth growth and development of the culture sector.
- Inadequate prioritisation of the culture sector by Government and private sector and limited access to financial resources has been a key limiting factor to growth and development
- Entrepreneurial skills are limiting wealth creation within the culture sector.
- Institutions managing the culture sector have limited resources to execute their mandate.
- Artists and art practitioners face the challenge of inadequate managerial skills to run viable enterprises.
- The role of women in the culture sector is small and peripheral, but increasingly women artists and practitioners are gaining prominence based on their contributions.
- Arts education institutions face resource constraints, and linkages with mainstream industry has been weak or lacking in some cases.

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5. RECOMMENDATIONS

This section presents the recommendations from the research. By virtue of having commissioned this study, the Culture Fund will take the responsibility of coordinating the adoption and implementation of these recommendations among the stakeholders in the culture sector. The recommendations are organised and presented according to sub-sectors. It was observed that across sub-sectors there is need to promote voluntary counseling and testing (VCT) in more artist friendly centres which uphold confidentiality.

5.1. LITERARY ARTS

Literacy arts contribute significantly to the documentation, application and dissemination of cultural knowledge and values. The following recommendations are made:

- Support budding writers associations to provide young writers with the space to learn and network. More could be achieved from a one-on-one mentorship programme between budding and established writers.
- Resuscitation of the language committees under the Ministry of Education, Sport and Culture.
- Providing resources for raising capacity of the Zimbabwe Book Development Council that previously worked in partnership with the Zimbabwe International Book Fair.
- Resuscitate the Literature Bureau or similar institution to provide guidance and mentorship to budding writers.
- Institution of resident writers arrangements in tertiary institutions.
- Government could provide resources to purchase cultural publications to stock public libraries in order to encourage and increase readership as well as to support publishing houses and authors.
- Empowering institutions including the Reprographic Rights Organisation to increase policing capacity to monitor and curb copyright infringements.
- At education ministerial level, the school curricula and design of the learning system should be reviewed to identify mechanisms of promoting creative writing skills, and a culture of reading (beyond the examinations) for both rural and urban schools.
- Cultivate a reading culture through rural libraries and reading clubs.
- Make the learning of literature compulsory through an education policy intervention.
- Develop a strategy for stakeholders in this sub-sector including publishers reviewing the viability of the industry and implementing innovative strategies to promote young talent.
- Develop and strengthen linkages with other arts industries, and enhance marketing through book reviews on various media (e.g., television, radio and print) to promote literary arts products.
- Encourage a more professional approach to the writing profession.

5.2. VISUAL ARTS

In pursuit of the promotion of visual arts the following recommendations are made:

- Identify leading artists who have emigrated to the Diaspora to run training sessions for local artists to keep them in touch with global market trends and strategies.
- Collate statistical evidence on the contribution of the culture sector to the economy and use this as an advocacy tool to lobby relevant institutions for policy changes, especially with respect to taxation.
- Develop a clear strategy for developing a vibrant and economically viable visual arts sub-sector.
- Develop capacity within the visual arts on use of computers and especially e-marketing. Assistance could be provided by developing a “Zimbabwean Virtual Cultural Village” where artists can host digital images of their work and quotations. Given secure payment systems, e.g., Pay Pal and an adjusted

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policy on export of cultural products and reasonable freight costs, this strategy could work for local visual artists.

- Encourage artists to form cultural villages or centres in each province.
- Enforce legislation on the use of natural resources to prevent degradation. Visual artists could play a leading role in promoting sustainable use of natural resources since they already appreciate the need to regulate consumption of trees and stones for sustainability.
- Artists should be encouraged to form marketing clusters, e.g., for international exhibition participation.
- Encourage development of creative art talent through policy interventions that make teaching and learning of art compulsory at primary schools. This should be supported by training of art teachers and improving accessibility of materials and resources.
- Training in administration of art should be provided across all levels.

5.3. PERFORMING ARTS

Consumption of products from the performing arts sub-sector is one of the highest locally for both urban and rural areas. Optimal exploitation of the potential artist and economic level benefits from this sub-sector could be achieved through implementation of the following strategies:

- Audience building and existing infrastructure renovation.
- Creating awareness for venue owners on talented artists and improving accessibility of venues.
- Repeal and amend censorship bill.
- Organisational capacity building of artists in administration and marketing.
- Need to create unions and associations with a secretariat that focuses on the interests of artists, without necessarily implementing projects.
- Conduct a sub-sector specific assessment study for a more comprehensive analysis.
- Promote skills and capacity building and participation and leadership of women in the performing arts.

5.4. MUSIC

The potential of the music industry continues to be hampered by lack of capacity and support for various artists and uncoordinated efforts by stakeholders. The following recommendations are made with a view to creating a conducive environment for the growth of the music sub-sector:

- Strengthen support institutions to ensure that artists have the necessary networks to record, publish, market and distribute their music.
- Focus on funding a few artists to develop capacity to monitor the effectiveness and impact on beneficiaries.
- Raise awareness on anti-piracy among both the artists and the community. Authorities must enforce legislation on anti-piracy which should be accompanied by firm action to curb the process of copyright infringement through duplication of music, discourage its sale and consumption.
- Facilitate attendance to various international festivals by musicians in order to market Zimbabwean music. For example, the annual Cape Town Jazz Festival is one such opportunity.
- The needs of artists are variable depending on their level. Strategies for developing the music sub-sector should be based on an analysis of the needs of various stakeholders and identifying the roles that partnerships and effective policy advocacy could play.

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- Promote capacity building programmes such as the Music Crossroads, which motivate young musicians, nurture, train and offer technical and funding support and facilitate marketing of their music.
- Mainstream HIV/AIDS training in the music sector capacity development strategies, considering the vulnerability of this sub-sector to this pandemic.

5.5. FILM

Zimbabwe has great potential as a film destination. Film makers in developed countries are in constant search of destinations for producing films. Zimbabwe has a wide climatic variation, beautiful scenery, diverse architecture, game parks and good infrastructure ideal for a broad array of movie genre. The following recommendations focus on developing the film industry in Zimbabwe:

- Conduct a market study to determine the potential and strategies for marketing Zimbabwe as a film making destination. Zimbabwe has previously successfully hosted some big movie projects including King Solomon's Mines, Quartermain and Cry Freedom.
- Harness and focus resources and partnerships on a single large production that could place Zimbabwean film on the global cinema and, in the process, raise the profile and incomes of artists. At the same time, the promotion of short film projects should continue.
- Advocate for the establishment of an independent broadcasting and telecommunications regulatory body to improve the quality of television programming.
- Repeal the Broadcasting Services Act (2001) to allow the entry of new players in community and commercial television.
- Strengthen internal processes and systems within the sub-sector through identifying active members in the sector and producing an inventory of equipment and resources available locally. A film committee responsible for coordinating development of the sub-sector could be established.
- Identify mechanisms of engaging the private sector and Government more effectively in supporting film projects and development of the film sub-sector.
- Strengthen and widen marketing channels for local film products through increased funding and coordination. Flea markets should also be considered for marketing.
- Improve communication within sub-sector through introduction of a journal or newsletter.
- The Culture Fund should consider creating a platform for local and regional networking of players in the film sub-sector.
- Funding should be considered for high capital film projects which may have a higher sub-sector impact compared to many smaller projects.
- Capacity building workshops for the sub-sector are required for enhancing quality of outputs at individual and institutional level (e.g., actors, producers, training institutions, associations, etc).
- A historical record of films ever produced in Zimbabwe should be documented, to offer the basis for future sectoral lesson learning and strategy formulation.

5.6. CULTURAL HERITAGE

- Incorporate management of cultural heritage into the current curricula of colleges and universities as well as primary and high schools to awaken national conscience to create customers for this sector when they are older.
- Promote a culture of interest in national heritage early in schools and an appreciation of heritage by the older generation to prevent the creation of a "lost generation".

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- Conduct a market study to determine and create an inventory of all the cultural heritage sites, and develop marketing strategies for implementation.
- Develop a national strategic framework focusing on the identification, appraisal, protection and promotion of cultural heritage sites.
- Promote wider marketing of heritage facilities such as galleries and museums for wider patronage.
- Adopt a harmonised approach to development of both urban and rural landscapes. The tendency has been preferential treatment of urban landscapes.
- Landscapes of cultural heritage significance should be preserved and promoted for both cultural tourism and film production.
- Conduct a market study to determine the potential for marketing the cultural heritage sub-sector.
- Promote cultural heritage in various national events such as the National Heroes Day commemoration, opening of Parliament, national and provincial biras and the composition and performance of the national anthem in order to provide an opportunity for self-expression and cultural preservation.
- Decentralise cultural heritage sites in order to give recognition of local heroes. This sets the platform for developing cultural tourism at local levels.
- There is a need to bring all cultural institutions and organisations under one umbrella ministry, instead of the current fragmentation where the National Archives and National Museums and Monuments fall under the Ministry of Home Affairs, while the National Gallery falls under the Ministry of Education, Sport and Culture.
- Promote research into local languages and dialects and facilitate their recognition through the media and education system. The cultures of the various ethnic groups, especially in districts with high ethnic diversity, provide a rich base for establishing cultural tourism based on the cultural village concept.
- Strengthen media use of local languages.
- Some traditional artifacts have been lost to Western museums and efforts should be made to replicate them or repatriate them to Zimbabwe.

5.7. MEDIA

The media plays a very important role in communicating culture. Institutional capacity in the media becomes a key priority in developing effectively communication on issues related to the culture sector. The following recommendations are made in support of the media sub-sector:

- Partner with media houses to allow for wider coverage and follow-up on activities and progress made by artists and showcasing talent. This recommendation increases the visibility of the arts sector as well as other stakeholders including the Culture Fund Trust in Zimbabwe.
- Engage the media more effectively to enhance communication of relevant information including events and festivals, opportunities for funding and networking, report policy deficiencies and possible interventions as well as general updates on the culture industry
- Engage the media in marketing more cultural products such as heritage sites in addition to popular locations such as Victoria Falls to increase national awareness among the population.
- Facilitate training workshops for journalists to improve their contribution to the growth and development of the culture sector.
- The media should be used more to promote the culture sector through programmes and wider targeting to ensure all sub-sectors and artists are included. The national broadcaster, Zimbabwe Broadcasting Holdings, should be utilised more to market the culture sector.
- Benchmark and learn best practices from elsewhere.

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5.8. PROGRAMMING AND MONITORING

The researchers make the following recommendations on programming and monitoring:

- To consider setting up a database of grant beneficiaries within the various categories funded. In addition, a sector wide database detailing indicators for various establishments across the country could be important in obtaining data on sector and monitoring growth and development.
- Train key stakeholders on how to conduct monitoring and evaluation within the culture sector. Training could be coordinated and funded by the Culture Fund and key stakeholders for training would include the NACZ and media, among others.
- A budget allocation for monitoring interventions (including resources for partner Government institutions) would be a worthy investment in ensuring programming effectives. The primary focus of monitoring should be the beneficiaries of grants.
- Indicators for monitoring (as detailed in the project logical framework) need to be simple and measurable, with sources of data and frequency of its collection clarified. A reporting format may be developed to facilitate this process.

5.9. FUTURE RESEARCH

- Although this baseline study provides key sector indicators, its breadth and depth require further specific studies to be conducted. We recommend further situational analysis on policy frameworks, economic contribution, financing and training arrangements and institutions available in the culture sector.
- Studies should be conducted at sub-sectoral level. Innovative mechanisms for engaging university and research institutions and sharing findings should be explored. If adequately supported, this initiative could also develop research capacity within the sector.
- Future studies should ensure inclusion of the “voice of the consumer”.

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6. ANNEXES

6.1. LIST OF KEY INFORMANTS AND INSTITUTIONS INTERVIEWED

INDIVIDUALS

1. Mr. J. Makumucha, Provincial Arts Manager, Mashonaland West, National Arts Council of Zimbabwe.
2. Mr. J. Nyambuya, Chairperson, Mashonaland West Visual Arts Association.
3. Mr. P. Pashapa, Chairperson, Department of Creative Arts and Design, Chinhoyi University of Technology.
4. Mr. V. Thebe, Acting Director, National Arts Gallery, Bulawayo.
5. Mr. D. Vambe, Jerusarema Mbende drummer, Murewa Culture Centre, Murehwa.
6. Mr. C. Mhlanga, Director, Amakhosi Theatre Club, Bulawayo.
7. Mrs. S. Muparaganda, Journalist, The Star, The Telegraph, New Ziana, Chinhoyi.
8. Mr. Tapererwa, Principal Provincial Officer, Ministry of Women's Affairs, Gender and Community Development.
9. Ms. C. Mbirimi, Budding Writers Coordinator, Chinhoyi.
10. Mr. Kusema, Department of National Parks and Wildlife, Mashonaland West, Chinhoyi.
11. Mr. W. Gava, Director, Zimbabwe Arts Network Association.
12. Mr. M.M.J. Mashodo, Education Officer, Sports and Culture, Midlands Province, Gweru.
13. Mr. Mandizvidza, Administration Officer, Ministry of Women's Affairs, Gender and Community Development.
14. Mr. Mashiri, District Youth Development Officer, Ministry of Youth Development and Employment Creation, Gweru.
15. Mr. Masanda, Community Development Officer, Cross Border Association, Gweru District.
16. Mr. Mphira, Director, Zimbabwe Military Museum, Gweru.
17. Mr. N.K. Mutswe, Heritage Education Officer, Aircraft Museum, Gweru.
18. Mr. Tony G., Music and Video Producer, Baseline Studios, Gweru.
19. Mr. S. Meda, Centre Manager, Murewa Culture Centre, Murehwa.
20. Mr. Fungai Zata, Murehwa Culture Centre, Murehwa.
21. Mr. Arifeto, Acting District Education Officer - Sports and Culture, Ministry of Education, Sports and Culture, Murehwa.
22. Mr. S. Ruze, Sculptor, Ruze Village, Murehwa.
23. Mrs. M. Jinguri, Executive Director, Dzefundze Trust, Murehwa.
24. Mr. L. Kashaka, Chairperson of Murehwa Number One Dance Group, Murehwa.
25. Mr. T. Chipangura, National Director, National Arts Council of Zimbabwe, Harare.
26. Mr. T. Gezi, Researcher, Zimbabwe Tourism Authority, Harare.
27. Mr. T. Dube, Manager, Harsh Touch Dance Group, Bulawayo.
28. Mr. C. Malunga, Artistic Director, Jenaguru Arts Centre, Harare.
29. Mr. F. Mbirimi, Performing Arts Consultant, Global Arts Theatre, Harare.
30. Ms. M. Jaure, Administration Assistant, Zimbabwe Music Rights Association, Harare.
31. Ms. M. Mushayi, Registrar, CHIPAWO, Harare.
32. Mr. D. Guzha, Producer, Rooftops Promotions, Harare.
33. Ms. A. Chapendama, Programme Officer, Swedish International Development Agency (Sida), Harare.
34. Mr. N. Sibanda, Organising Secretary, Victoria Falls Arts Ensemble, Victoria Falls.
35. Mrs. Miti, Jairos Jiri Association, Bulawayo.
36. Mrs. S. Mpofu, Actress, Director, Fingers Academy, Bulawayo.
37. Mr. J. Nyapimbi, Director, Nhimbe Trust, Bulawayo.
38. Mr. P. Ndlovu, Chairperson, Hwange Urban Arts Association/Vulindlela Performing Arts, Hwange.
39. Mr. A. Mujimba, Kombooka, Victoria Falls.

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40. Thomas, Sound Engineer, Choc Studios, Victoria Falls.
41. Mr. G. Banda, Dreadline Arts Coalition, Hwange.
42. Mr. A. Ndlovu, Culture Activist, Hwange.
43. Mr. Nyoni, Ngomamano Cultural Group, Hwange.
44. Mr. L. Munzabwe, Director, Backstage Theatre Productions, Hwange.
45. Ms. D. Khumalo, Manager, Mpumelelo Groovers, Hwange.
46. Mr. N. Ndlovu, Pezhuba Pachena, Hwange.
47. Ms. S. Nyoni, Writer/Poet, Gwanda.
48. Mrs. S. Mpisaunga, Arts Manager, British Council, Harare.
49. Mr. D. Benhura, Dominic Studios/Tengenenge Village, Harare.
50. Mr. B. M. Dube, Provincial Arts Manager, National Arts Council of Zimbabwe. Bulawayo and Matabeleland North,
51. Mr. L. Ncube, Assistant Editor, The Chronicle and The Sunday News, Bulawayo.
52. Professor B. Jones, Director, Amabooks, Bulawayo.
53. Mr. M. Gumpo, Poet, Bulawayo.
54. Mr. G. Mabeza, Student Partnership Worldwide, Harare.
55. Ms. T. Zulu, Director, Intwasa Festival/film maker, writer, Bulawayo.
56. Mr. E. Masongela, Manager, Ingwe Studios, Bulawayo.
57. Mr. Khulekani “Khuxman” Bethule, Musician, Bulawayo.
58. Mr. Z. Ndebele, Coordinator, Radio Dialogue, Bulawayo.
59. Mr. C. Zulu, Chairperson, Visual Arts Association, Bulawayo.
60. Mr. F. Nkomo, Chairperson, Visual Arts at Intwasa, Bulawayo.
61. Ms. K. Bently, Bulawayo Theatre Club, Bulawayo.
62. Mr. S. Makuvaza, Administrator, National Museums and Monuments, Bulawayo.
63. Mr. Rusike, Arts Coordinator, Bulawayo Polytechnic College, Bulawayo.
64. Mr. S. Mkhithika, SFM, Zimbabwe Broadcasting Holdings, Bulawayo.
65. Mrs. Gaba, District Education Officer, Rushinga.
66. Mrs. Bokosho, Siyaziwa Arts Centre, Masvingo.
67. Ms. Agnes Gwatiringa, Independent Film Producers Association of Zimbabwe, Harare.
68. Ms. B. Nyika, Mbira Academy, Harare.
69. Mr. B. Tafireyi, Executive Chairman, Zimbabwe Publishing House, Harare.
70. Mr. O. Chauke, Programmes Officer, National Arts Council of Zimbabwe, Marondera.
71. Mr. Mutami, Chairperson, Department of History and Development Studies, Midlands State University, Gweru.
72. Mrs. Y.E. Stranix, Administrator, The Dance Trust of Zimbabwe, Harare.
73. Mr. T. Njanja, Outreach Programme Coordinator, Dance Trust of Zimbabwe, Harare.
74. Ms. Marie-Laure Edom, Dance Instructor, Choreographer/Consultant, Dance Trust of Zimbabwe, Harare.
75. Ms C. Lee, Dance Trust of Zimbabwe, Harare.
76. Mr. D. Hill, Masvingo Drama Circle, Masvingo.
77. Mr. K. Simomondo, Culture Coordinator, Mutare-Harlem City Link, Mutare.
78. Dr. T. Chitepo, Dean, Faculty of Humanities and Social Sciences, Africa University, Mutare.
79. Ms E. Muusha, Director, National Art Gallery, Mutare.
80. Mr. J. Shereni, Ministry of Youth, Gender and Development, Mutare.
81. Mrs. R. Irimayi, Cultural Coordinator, Mutare District Education Office, Mutare.
82. Mr. W. Segura, Physical Education and Sports Officer, Ministry of Education, Sports and Culture, Mutare.
83. Mr. H. Tsopotsa, Chairperson, of Manicaland Association of the Performing Arts, Mutare.
84. Mr. D. Chimuka, Chairperson, Manicaland Visual Arts and Craft Association, Mutare.
85. Mr. G. Muzimba, Chairperson, Manicaland Photographers Association, Mutare.

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86. Mr. J. Mupfute, Music Lecturer, Mutare Teacher's College/Tertiary Institutions Festivals of the Arts, Mutare.
87. Mr. C. Ndlovu, Deputy Director, Zimbabwe College of Music, Harare.
88. Mr. S. Chifunyise, Board Chairperson, CHIPAWO, Harare.
89. Mr. A. A. Ruswa, Provincial Arts Manager, National Arts Council of Zimbabwe, Manicaland.
90. Ms. N. Matema, Executive Director, Zimbabwe International Film Festival Trust, Harare.
91. Mr. Chimbidzikai Mapfumo, UNESCO Regional Office, Harare.
92. Ms. Mulekeni Ngulube, Culture Specialist, UNESCO Regional Office, Harare.

INSTITUTIONS

1. Zimbabwe Book Development Council, Harare.
2. Mbira Centre, Harare.
3. Zimbabwe Union of Journalists, Harare.
4. Marondera Music Association, Marondera.
5. Manicaland Association of the Performing Arts, Manicaland.
6. Mambo Press, Gweru.
7. Zimbabwe Traditional Dancers Association, Harare.
8. Patsime Trust, Harare.
9. Masvingo Arts Ensemble, Masvingo.
10. Zimbabwe Music Rights Association, Harare.
11. Music Crossroads, Harare.
12. Queen's Hall, Mutare.
13. Constellation Youth Society, Mutare.
14. Graphic Arts Studio, Mutare.
15. Red Rose Entertainment, Harare.
16. Chitungwiza Arts Centre, Chitungwiza.
17. Gramma Records, Harare.
18. Zimbabwe, Women Writers Association
19. Budding Writers Association
20. Chipaz Promotions, Harare.
21. National Training and Conference of the Arts, Harare.
22. Nemanwa Craft Centre, Great Zimbabwe, Masvingo.
23. Peter Birch School of Art, Harare.
24. Rainbow Hotel, Victoria Falls.

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