



**MAPPING OF CULTURE AND  
CREATIVE INDUSTRIES IN THE EAST  
AFRICAN COMMUNITY  
(2019)**



Tingatinga (also spelt Tinga-tinga or Tinga Tinga) is a painting style that developed in the second half of the 20th century in the Oyster Bay area in Dar es Salaam (Tanzania) and later spread to most of East Africa. Tingatinga is one of the most widely represented forms of tourist-oriented paintings in Tanzania, Kenya and neighboring countries. The genre is named after its founder, Tanzanian painter Edward Said Tingatinga.

Cataloguing-in-Publishing Data: East African Community, Mapping of Culture and Creative Industries in the East African Community (2019), Arusha.

ISBN: 978 9987 712 89 2



# MAPPING OF CULTURE AND CREATIVE INDUSTRIES IN THE EAST AFRICAN COMMUNITY (2019)

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JUNE 2018  
[www.eac.int](http://www.eac.int)

EAC SECRETARIAT  
ARUSHA, TANZANIA



*In East Africa, many rural women shape their own prosperity by weaving sisal, raffia and doum palm baskets.*

*The finished baskets are used for keeping vegetables, fruits, grain and to keep food hot. The small baskets are used as parking materials for gifts and can also be used for serving bread.*

*The baskets can also be used as modern home decor.*

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# ACRONYMS

<b>AGOA</b>	American Growth Opportunities Act
<b>CAS</b>	Child Activities Survey
<b>COMESA</b>	Common Market for East and Central Africa
<b>CSOs</b>	Civil Society Organizations
<b>CSPro</b>	Census and Survey Procedures
<b>EAC</b>	East African Community
<b>ICESCR</b>	International Covenant on Economic, Social and Cultural Rights
<b>ILO</b>	International Labour Organization
<b>ITC</b>	International Trade Centre
<b>MEACA</b>	Ministry of East African Affairs
<b>NEPAD</b>	New Partnership for African Development
<b>NDP</b>	National Development Plan
<b>SMEs</b>	Small and Medium Enterprises
<b>UBOS</b>	Uganda Bureau of Statistics
<b>UCC</b>	Uganda Communications Commission
<b>UDHR</b>	Universal Declaration of Human Rights
<b>UN</b>	United Nations
<b>UNATCOM</b>	Uganda National Commission for UNESCO
<b>UNCTAD</b>	United Nations Conference on Trade and Development
<b>UNDP</b>	United Nations Development Programme
<b>UNESCO</b>	United Nations Educational Scientific and Cultural Organization
<b>UNIDO</b>	United Nations Industrial Development Organization
<b>UNLF</b>	Uganda National Labour Force

<b>URA</b>	Uganda Revenue Authority
<b>URSB</b>	Uganda Registration Services Bureau
<b>WBS</b>	Wavah Broadcasting Service
<b>WHO</b>	World Health Organization
<b>WIPO</b>	World Intellectual Property Organization
<b>WTO</b>	World Trade Organization

# FOREWORD



Culture and Creative Industries across the globe today represent one of the most rapidly expanding economic sectors. The East African Community (EAC), despite the abundance of creative talents and rich cultural assets, it is yet to benefit from the huge economic potential of its culture and creative industries to promote economic growth, job creation, social inclusion, and export earnings.

It is argued that today these industries offer more sustainable development options than traditional exports as the sector draws on the creativity of local artists and entrepreneurs, generating higher levels of local value-added products.

One of the critical challenges in harnessing the potential of culture and creative industries in the EAC has been the lack of reliable data, facts and figures, which can be used by development planners and policy makers to take informed decisions.

This regional Mapping Study of Culture and Creative Industries was therefore undertaken to address this challenge, by producing a comprehensive regional report which unveils information on the various segments of culture and creative industries in terms of geographical distribution and concentration; regional statistic and global market opportunities; export (turnover); contribution to GDP and employment; royalties and copyrights; as well as strategies for developing culture and creative industries in the EAC.

The main purpose of this mapping study, was to assist the EAC in providing baseline data and information regarding the state of culture and creative industries in the region unto which future studies and research can be based. It further tries to articulate measures which can be taken to optimize the economic potential of the culture and creative industries for job creation and expansion of regional trade in cultural goods and services.

The mapping of culture and creative industries is bound not only to improve awareness of the contribution of culture and creative industries to the regional GDP; but also increase public and private sector investment in the regional creative economy, as well as improve competitiveness of the EAC in the global creative industries market.

It is envisaged that the information in the report will:

- a. Increase awareness of the latent economic potential of culture and creative industries;
- b. Encourage entrepreneurship in the culture and creative sub-sector;
- c. Increase the public and private investment in the culture and creative sector;
- d. Better recognize artists and cultural workers for better work conditions and improve their status;
- e. Improve capacity through training and professionalization;
- f. Enhance skills and competence in creating, producing, marketing and managing cultural goods and services;
- g. Upgrade the informal activities in the cultural sector to become better structured, effective and sustainable;
- h. Expand activities in the cultural sector and increase income for artists and cultural workers;
- i. Increase job opportunities in the cultural sector;
- j. Facilitate circulation and access to market of local/regional cultural goods and services;
- k. Increase contribution of the cultural sector to local, national or regional development and economic growth; and
- l. Support the harmonization of regional cultural policies and legislations.

Finally, we would like to acknowledge and appreciate the contribution of the development partners, the Regional Mapping Study Team, and all individuals and institutions which actively participated in this endeavor. We are hopeful this report will make the desired contribution towards stimulating policy decision and Strategies which will foster the growth of the creative economy in the EAC.

**Amb. Liberat Mfumukeko**  
Secretary General

# EXECUTIVE SUMMARY



*Informing the planning and implementation of regional interventions towards the development of the culture and creative sector*

In 2015, the East African Community (EAC) Secretariat commissioned and supported the development and compilation of a regional report of culture and creative industries in its Partner States - Kenya, Uganda, Tanzania, Rwanda and Burundi. This followed an earlier support by the Secretariat in 2013 and 2014 to the Partner States to produce national mapping studies for culture and creative industries. The regional report, therefore, makes a comprehensive capture of data from the national status reports of the Partner States. Additional information was also secured through literature review of regional and international studies on culture and creative industries.

Specifically, this regional report provides information on culture and creative industries in order to inform the planning and implementation of regional interventions towards the development of the culture and creative sector. The report covers geographical distribution and concentration, regional statistics and global market opportunities, export (turnover), contribution to GDP and employment, royalties and copyrights and strategies for developing culture and creative industries in the EAC. It also provides for actions and strategy plans for the dissemination of the information in this report to all stakeholders in the EAC Partner States.

## ***Methodology of preparing the regional report:***

This regional mapping report was prepared and compiled through several stages. First, Partner States compiled national status reports on the culture and creative industries and submitted them to the East African Secretariat.

These reports were subjected to a comprehensive review, as part of a general analytical examination of relevant literature including, but not limited to the EAC 4th Development Strategy, Reports by UNESCO and UNCTAD on the global creative economy; selected studies and reports on the creative economy for

other countries; and national policy documents of Partner States as well as best practice action plans and strategies from successful regions and countries in the promotion of culture and creative industries. Partner States through a series of engagements discussed, reviewed and validated the information and data presented in this report.

## ***Status of EAC Culture and Creative Industries***

The report provides information on the growth of the creative economy within the EAC which is estimated at 5% per annum and is likely to triple in size globally by 2020 (Howkins, 2001 in Joffe & Newton, 2008). Culture and Creative Industries (CCIs) in EAC represent an under-developed sector, which nevertheless has significant potential for social and economic growth. Recent evidence (EAC 2014 National Status Reports) indicates that EAC earns a huge USD 2 billion in trade for culture goods and services in 2014 and that CCIs are thriving

in different Partner States as mainly small and medium size enterprises (SMEs) with few cases categories as large enterprises. Most of these enterprises are concentrated in urban areas but with potential to spread out to the countryside. Most CCIs are in the informal sector operating as unregistered small scale enterprises. Registered companies belong mainly to the private sector although a few are owned by governments. For instance in Kenya 13.6% are registered as private companies, 60.2% in Uganda, 31.2% in Tanzania and 46% in Burundi.

In terms of market coverage, culture and creative industries utilized mainly the local markets for products and services produced. For instance 20% culture goods and services are traded in national markets in Kenya against 60% in local markets; in Uganda 37.1% are sold in national markets and 83.7% for local markets. In Burundi local market coverage stands at 27.1% against 64.3% of the national markets; while in Tanzania local markets take 38.8% and national market is 72.4%.



In terms of revenue, SME take the bulk of CCI earnings, but again these constitute a tiny percentage of the industry. Majority of operators earn just under US\$ 5,000 annually. Companies earning in this bracket account for 80% in Kenya, 58.5% in Uganda, 75.6% in Tanzania, 48.9% in Rwanda and 46.2% in Burundi.

Companies earning above USD 500,000 threshold stand at 2.1% in Kenya, 5.6% % in Uganda 6% in Tanzania and 5.3% in Burundi.

There is no doubt that within the EAC Partner States, there is an abundance of creative talents and rich cultural assets with a huge economic potential for culture and creative industries to promote economic growth, job creation, social inclusion, and export earnings.

At statutory level, in Article 119 ( c ) of the Treaty, the Partner States undertake to cooperate in the promotion of cultural activities, including the fine arts, literature, music, the performing arts and other artistic creations. The East African Community has the potential to create wealth from its rich cultural heritage, but its creative industries are marginal players in the global market.

### **Economic Status and trends in Global Trade**

Globally a research study conducted by UNCTAD in 2013 shows that the share of developing country exports in the world trade of creative goods and services has grown steadily in recent years, with total exports reaching US\$ 631 billion in 2013. Over the past decade, the creative industries have been embraced enthusiastically as a new growth model. Evidence shows that

the creative economy is an ever stronger driver of development. Depending on how they are defined, the creative industries are estimated to represent anywhere from 3% to 12% of global GDP (UNCTAD, 2013). In developed markets for instance in the United Kingdom (UK), gross value added of the creative industries were £71.4 billion in 2012 and accounted for 5.2 per cent of the UK economy, with a growth of 15.6 per cent since 2008, creating 1.68 million jobs in 2012 and 5.6 per cent of the total number of jobs in the UK (UK DCMS 2014). South Africa reported 3.7% annual growth for creative goods in the period 2005-2012, which generated revenues from the industry of about US \$9.2 billion in 2012 (UNCTAD, 2012).

At the regional level across the African continent, the cultural and creative industries have seen rapid growth in recent years, despite the fact that Africa's share of the global creative economy stands at less than 1%, with the key contributors to this 1% being North African countries and South Africa.

### **Conclusions and recommendations**

The report provides key conclusions and recommendations which among others the recommended model and potential of the EAC creative industries. The report clusters cultural and creative industries according to the following themes: Industries in core cultural domains, museums, galleries, libraries, performing arts, festivals, visual arts, crafts design, publishing, television, radio, film and video, photography and interactive media

Industries in expanded cultural domains include musical instruments, sound equipment,



Drumming is a common form of entertainment in African culture; however, the idea of female drummers was unheard of in the past.

architecture, advertising, printing equipment, software, and audiovisual hardware.

In particular, the report recommends the need to:

- Establish a statistical framework for the region;
- Establish a special fund/ products to support cultural industries,
- Establish partnerships with training institutions to promote/ undertake skills training,
- Conducting market research and disseminate market information and intelligence to sector operatives,
- Develop regional events (such as regional galas, festivals and exhibitions for products and services of culture and creative industries) that can boost and attract markets for creative industries,

• Adopt ICT tools for marketing cultural goods and services,

• Create awareness of the copyright and intellectual property laws among producers and other actors in the cultural industries sector,

• Produce simplified versions of existing laws and translate them into local languages,

• Strengthen the capacity of the duty bearers to enforce existing laws, encourage producers to form cooperative societies to facilitate standardization and bulk marketing of products,

• Facilitate local producers to acquire equipment that can help with improving quality of the products.

# CHAPTER I: BACKGROUND



## 1.1 Introduction

Globally creative industries have been formally recognized as having potential for major growth on their own, as well as impacting on a large number of other more 'traditional' business sectors. There is also growing consensus that culture and creative industries<sup>1</sup> can create jobs, increase export earnings leading to economic growth. In an export driven environment, the contribution of creative assets has been acknowledged as growing in importance. Creative assets can promote not just economic growth and trade but also social inclusion, cultural diversity and human development.

<sup>1</sup> Cultural or creative industries are the economic activities of artists, arts enterprises, and cultural entrepreneurs, for-profit as well as not-for-profit, in the production, distribution and consumption of film, literature, music, theatre, dance, visual arts, broadcasting, and fashion



*Strengthening of cooperation among Partner States to develop and promote cultural and creative industries in the region.*



Customs Union  
2005



Common Market  
2010



Monetary Union  
2013



Political Federation

Within the mandate of the East African Community (EAC) Treaty under Article 119, the five Partner States have agreed to promote close cooperation amongst themselves through the promotion of cultural and sporting activities as one of the strategies to foster regional economic development and integration. Consequently, the EAC Development Strategy 2011-2016 provides for the strengthening of cooperation among Partner States to develop and promote cultural and creative industries in the region.

As the EAC moves into the operationalization of the Common Market Protocol, it is important to focus on the exploitation of cultural assets and creativity of the East African people and to bring together practitioners and stakeholders that are engaged in these cultural and creative activities.

Against this background, studies were conducted in the five Partner States of the EAC between 2012 and 2015 with goals of establishing reliable databases for the various sectors that form culture and creative industries in the region; informing policy formulation and strategic planning as well as to document the economic impact of these industries for advocacy so that creative industries can feature more prominently in the development strategies of the EAC. This report comes in to summarize the findings from those five studies.

## 1.2 The East African Community

The East African Community (EAC) is the regional intergovernmental organization of the Republics of Burundi, Kenya, Rwanda, Uganda and the United Republic of Tanzania. It has its headquarters in Arusha, Tanzania. The Treaty for Establishment of the East African Community was signed on 30th November 1999 and entered into force on 7th July 2000 following its

ratification by the original three Partner States: Kenya, Tanzania and Uganda. The Republic of Rwanda and the Republic of Burundi acceded to the EAC Treaty on 18th June 2007 and became full Members of the Community with effect from 1st July 2007.

The **Vision** of EAC is *'a prosperous, competitive, secure, stable and politically united East Africa'*;

The **Mission** is *to widen and deepen economic, political, social and cultural integration of the region in order to improve the quality of life of the people of East Africa through increased competitiveness, value added production, trade and investments.*

EAC countries have a long history of integration dating back to the original EAC of 1917, which collapsed in 1977. Regional integration efforts were revived in 1999 with the signing of the new Treaty. The overarching objective of the Community is to widen and deepen co-operation in economic, social and political affairs. Cultural cooperation is also part of the areas of interest the EAC Partner States.

### 1.3 Legal Framework

Article 119 of the Treaty for the establishment of the EAC requires Partner States to promote close cooperation amongst themselves in the culture and sports. For culture, the Treaty notes the need to promote cultural activities including fine arts, literature, music, performing arts and other artistic creations along with the conservation, safeguarding and development of the historical materials and antiquities. In Article 119 (c) of

the Treaty, the Partner States undertake to cooperate in the promotion of cultural activities, including the fine arts, literature, music, the performing arts and other artistic creations. The Partner States further undertake to forge close co-operation with respect to the development of mass media programs on matters that will promote culture within the Community. The objective of this cooperation is to promote a people-centred mutual development and to strengthen and consolidate the long standing ties and associations among citizens of the region.

The EAC Common Market Protocol (CMP) which came into force in July 2010 aspires to accelerate economic growth and development in pursuit of the vision to widen and deepen cooperation among the Partner States in the economic, social and cultural fields. In efforts to actualize Article 43 of the Protocol, the Partner States undertook to foster cooperation in the field of intellectual property rights and in the promotion and protection of creativity and innovation for economic, technological, social and cultural development in the Community.

### 1.4 Mapping Study Rationale

East African Partner States are endowed with a rich and diverse cultural heritage whose expressions give rise to a diversity of culture and creative industries. These are areas in which countries in the EAC, like many developing countries, enjoy some comparative advantage. The rise of the digital economy and the increasing commercialization of the arts created a window of opportunity for the EAC to exploit the latent economic potential of the creative economy. These industries also offer more sustainable

development options than traditional exports because the sector draws on the creativity of local artists and entrepreneurs, thus generating higher levels of local value-addition. Moreover, the sector has strong growth potential and plays a key role in the arena of regional identity formation.

In the EAC to date, there has been limited investigations, and though some of the Partner States have focused on specific parts of the creative industries (e.g. film, music) this Mapping Study will be the first broad based regional study aimed at providing baseline data to facilitate policy formulation, planning as well as future studies.



### 1.5 Objectives of the study

The overall objective of this study was to contribute to the ongoing efforts to strengthen the cooperation among Partner States to develop and promote culture and creative industries in the EAC by providing baseline information which can be used for regional culture and economic policy formulation and planning.

The Specific Objectives were to:

1. Identify sectors within the EAC creative industries that have the potential to form different clusters
2. Assess the characteristics of the various creative industry “sectors” and key players and policy environment in each of the EAC Partner States
3. Compile national statistics of culture industries (in terms of exports, employment, contribution to GDP and infringement) and international statistics (in terms of foreign sales, use of works, competition, marketing intelligence, infringement and media value)
4. Compile socio-economic data of the regional creative businesses
5. Identify critical issues and challenges by sector that culture and creative industry businesses face.

## 1.6 Methodology

The preparation and compilation of the regional mapping report was done following a comprehensive review of National Status Reports of Culture and Creative Industries provided by the Partner States through the EAC Secretariat. There was also a review of other relevant literature such as the EAC 4th Development Strategy, UNESCO's Global Reports on Culture and Creative Industries, UNCTAD's Global Database on Creative Economy and others. The study team also considered selected studies and reports on creative economy for other countries, national policy documents of Partner States and other best practice action plans and strategies from successful regions and countries in the promotion of culture and creative industries. In the framework of the Medium Term Expenditure Framework 2012/2013-2014/2015, this report is the final stage in the process of regional mapping. It follows the completion of the first phase that consisted of compilation, the preparation and pre-testing of the mapping study tools and the second phase that consisted of the collection, analysis and compilation of National Status Reports.

## 1.7 Scope

### **The study team:**

- i. Collected and reviewed existing national level documentation, policies, strategic plans and reports on cultural and creative industries.
- ii. Carried out extensive consultations with the key stakeholders and cultural practitioners to identify the key actors and collected available data on creative industries sector in each Partner State.

## 1.8 Outcomes

Taking into account the Terms of Reference, this study sought to and actually has produced:

- i. Country reports of the study findings;
- ii. Final Combined Mapping Study report covering five EAC Partner States.



The Royal Drummers of Burundi, commonly known as The Drummers of Burundi, is a percussion ensemble originally from Burundi. Their performances are a part of ceremonies such as births, funerals, and coronations of (Kings). Drums (called karyenda) are sacred in Burundi, and represent the mwami, fertility and regeneration. The Royal Drummers use drums made from hollowed tree trunks covered with animal skins. The performance of the Royal Drummers has been the same for centuries, and their techniques and traditions are passed down from father to son. At the start of their performance, the drummers enter balancing the heavy drums on their heads and singing and playing.

# CHAPTER 2: CONTEXT ANALYSIS



## 2.1 Definitions of Key Concepts and Models of Analysis

### 2.1.1 Definitions of Key Concepts

Mention of the term “creative economy” brings to light concepts like “cultural industries”; “creative industries”; “content-based or copyright industries” and “cultural or cognitive-cultural economy”. The different labels by authors reflect and correspond to different analytical positions and ideological stakes in culture and creative industries globally. These concepts have become a terrain of lively expert debate to-date.

The **United Nations Conference on Trade and Development (UNCTAD 2010)** defines creative

industries as: “the cycles of creation, production and distribution of goods and services that use creativity and intellectual capital as primary inputs; constituting a set of knowledge-based activities, focused on but not limited to arts, potentially generating revenues from trade and intellectual property rights; comprising tangible products and intangible intellectual or artistic services with creative content, economic value and market objectives; stand at the crossroads of the artisan, services and industrial sectors; and constitute a new dynamic sector in world trade”.

On the other hand, the **UNCTAD 2010** Report defines the creative economy as “an evolving concept based on creative assets potentially generating economic growth and development.



*At the heart of the creative economy are the creative industries*  
- UNCTAD

It is a set of knowledge-based economic activities with a development dimension and cross-cutting linkages at macro and micro levels to the overall economy”. UNCTAD believes **the creative economy:**

- can foster income generation, job creation and export earnings while promoting social inclusion, cultural diversity and human development.
- embraces economic, cultural and social aspects interacting with technology, intellectual property and tourism objectives.
- is a feasible development option calling for innovative, multidisciplinary policy responses and inter-ministerial action.

**UNCTAD observes that** at the heart of the creative economy are the creative industries.

United Kingdom’s Department of Culture, Media and Sport (DCMS) defines “Creative industries” as those requiring creativity, skill and talent, with potential for wealth and job creation through the exploitation of their intellectual property.<sup>1</sup>

<sup>1</sup> [www.culture.gov.uk/creative\\_industries](http://www.culture.gov.uk/creative_industries)

**Van Graan (2005)** gives a working definition of creative industries as ‘those areas of social and economic activity that are founded on or closely allied with an individual or collective intellectual or artistic creativity, innovation and originality’.

He notes that:

*the conservation, teaching and celebration of cultural heritage, as well as language which have the ability to offer work and generate income for the original creators and also for others involved in education and training, production, distribution, documentation and support for creative products or cultural experiences, whether in a not-for-profit capacity or for commercial gain. Further the creative industries sector constitutes a range of activities, which is related to the professional services, innovation, information economy, manufacturing activities and research and development and cultural activities (van Graan, 2005:12).*

The term **Cultural industries** traces its history to earlier work in the Frankfurt School in the 1930s and 1940s, which scathingly decried the commodification of art as providing an

ideological legitimization of capitalist societies and the emergence of a popular culture industry. Such pessimistic views of the relationship between culture and capitalist enterprise are still held by some to-date. This is notably the case on the Left, and particularly today in the context of the debate on the threat of global cultural homogenization. These views are also based on a view of culture and the economy as mutually hostile, each driven by logics so incompatible that when the two are made to converge, the integrity of the former always suffers. By the early 1960s, however, many analysts had begun to recognize that the process of commodification does not always or necessarily result in the degeneration of cultural expression. Indeed, often the contrary may be true, for industrially (or digitally) generated goods and services clearly possess many positive qualities. Hence, by the 1980s the term cultural industries no longer carried pejorative connotations of the earlier term and began to be used in academia and policy-making circles as a positive label.

The term **creative industries** is applied to a much wider productive set, including goods and services produced by the cultural industries and those that depend on innovation, including many types of research and software development. The phrase cultural Industries began to enter policy-making in 1990s in Australia and UK<sup>2</sup>. The usage of the phrase also stemmed from the linking of creativity to urban economic development and city planning in Europe in the early 1990s.

It was given a first significant boost by the important work carried out by the British consultant Charles Landry on the “creative city”. A second and highly influential force internationally was the work of Richard Florida, an American urban studies theorist, on the “creative class” that cities needed to attract in order to ensure their successful development.

### 2.1.2 Classification Models of Cultural and Creative Industries

A number of different models have been put forward in recent years as a means of providing a systematic understanding of the structural characteristics of the creative industries (UNCTAD 2010). Each model has a particular rationale, depending on underlying assumptions about the purpose and mode of operation of the industries. Three models (UNESCO, World Intellectual Property Organization and DCMS) are elaborated in Table 1 below.



Most African toys are hand-woven and are artistically and wonderfully crafted

Table 1: Classification Models of Cultural and Creative Industries

UNESCO Institute of Statistics Model	WIPO Copy Right Model	UK's DCMS Model
<p><b>Industries in core cultural domains</b></p> <ul style="list-style-type: none"> <li>• Museums, galleries, libraries</li> <li>• Performing arts</li> <li>• Festivals, Visual arts,</li> <li>• Crafts Design</li> <li>• Publishing, Television,</li> <li>• Radio, Film and video</li> <li>• Photography</li> <li>• Interactive media</li> </ul>	<p><b>Core copyright industries</b></p> <ul style="list-style-type: none"> <li>• Advertising</li> <li>• Collecting societies</li> <li>• Film and video</li> <li>• Music</li> <li>• Performing arts</li> <li>• Publishing</li> <li>• Software</li> <li>• Television &amp; radio</li> <li>• Visual and graphic art</li> </ul>	<ul style="list-style-type: none"> <li>• Advertising</li> <li>• Architecture</li> <li>• Art&amp; antiques market</li> <li>• Crafts</li> <li>• Design</li> <li>• Fashion</li> <li>• Film and video</li> <li>• Music</li> <li>• Performing arts</li> <li>• Publishing</li> <li>• Software</li> <li>• Television and radio</li> <li>• Video and computer games</li> </ul>
<p><b>Industries in expanded cultural domains</b></p> <ul style="list-style-type: none"> <li>• Musical instruments</li> <li>• Sound equipment</li> <li>• Architecture</li> <li>• Advertising</li> <li>• Printing equipment</li> <li>• Software</li> <li>• Audiovisual hardware</li> </ul>	<p><b>Partial copyright industries</b></p> <ul style="list-style-type: none"> <li>• Architecture</li> <li>• Clothing,</li> <li>• footwear</li> <li>• Design</li> <li>• Fashion</li> <li>• Household goods</li> <li>• Toys</li> </ul>	

Source: UNESCO /UNDP Creative Economy Report, 2013

All domains provide a rich classification of cultural and creative industries. However, for purposes of this report, the EAC zeroed in on the UNESCO model as the most fitting to EAC policy, statistical and programming interests. It presents a more dominant and cross cutting classification.

## 2.2 Legal and Policy Context

This section delves into the legal and policy framework on culture in the East African Community (EAC) region. It consists of International, African, Regional and National Legal and Policy instruments ranging from Conventions, Treaties, Charters at International and Regional levels to Laws and Policy instruments at National level.

### 2.2.1 International Legal Frameworks

At International level, the United Nations Educational, Scientific and Cultural Organization (UNESCO), whose purpose is to contribute to peace and security by promoting international collaboration through

<sup>2</sup> The national cultural policy of Australia in the early 1990s was followed by the transition made by the influential Department for Culture, Media and Sport of the United Kingdom from cultural to creative industries at the end of the decade

education, science and culture, has crafted international legal instruments-Conventions that underpin the promotion and development of culture and creative industries globally and have guided the development of culture policy in the EAC region.

These international legal instruments include the Conventions on the Protection and Promotion of the Diversity of Cultural Expressions of 2005; Safeguarding of the Intangible Cultural Heritage of 2003; Protection of the Underwater Cultural Heritage of 2001; Protection of the World Cultural and Natural Heritage of 1972, Fighting against the illicit trafficking of Cultural Property of 1970 and the Protection of Cultural Property in the Event of Armed Conflict in 1954.

All the countries of the EAC have ratified the Conventions on the Protection and Promotion of the Diversity of Cultural Expressions of 2005 and Safeguarding of the Intangible Cultural Heritage of 2003. In addition, Tanzania and Burundi ratified the Protection of the World Cultural and Natural Heritage of 1972 while the other countries have accession<sup>3</sup> to the Convention. Tanzania and Rwanda have also ratified the Convention on Fighting against the illicit trafficking of Cultural Property of 1970 and the two countries have accessions to the Convention of Cultural Property in the Event of Armed conflict of 1954.

Despite the porous borders and the history of armed conflict in the EAC region, none of these countries has ratified or has accessed the 1970 and 1954 Convention. Furthermore, none of the countries in the EAC region have ratified the Convention on the Protection of the Underwater

Cultural Heritage despite the proximity to the Lake Victoria for Uganda, Kenya and Burundi and the ocean for Kenya and Tanzania.

Also, multilateral copyright treaties are critical for the growth and development of culture and creative industries. These include the Berne Convention (1887) for the Protection of literary and Artistic Works, the Universal Copyright Conventions of Geneva (1955) and Paris (1974), the Agreement on Trade Related Aspects of Intellectual Property Rights (TRIPS) of 1995 and the WIPO Copyright Treaty of 2002.

Kenya, Rwanda and Tanzania have signed and ratified the Berne Convention. Kenya and Rwanda have also signed and ratified the Universal Copyright Conventions of Geneva and Paris. All the EAC countries have ratified the TRIPS Agreement and Kenya has signed the WIPO Copyright Treaty. It is important to note that Uganda and Burundi have not signed and ratified any other multilateral copyright treaty except for TRIPS. On the other hand, Kenya has signed and ratified all these treaties except the WIPO Copyright Treaty, which is yet to come into force.

Other International treaties that have a bearing on the culture and creative industries in the region include the Universal Declaration of Human Rights (UDHR) and the International Covenant on Economic, Social and Cultural Rights (ICESCR) which every country in the EAC has ratified. Article 27 of the Universal Declaration of Human Rights (UDHR) and Article 15 of the ICESCR provide for the recognition of everyone's right to freely participate in cultural life.

<sup>3</sup> Accession has the same legal effect as ratification. It occurs when the treaty has entered into force

## 2.2.2 Africa Regional Legal Frameworks

At the African region level, all African countries are bound by the Charter for African Cultural Renaissance of 2006. Article 10 (2) of the Charter enjoins all state parties in Africa to: protect and promote the freedom of artists, intellectuals and men and women of culture; protect and develop tangible and intangible cultural heritage; financially and materially support cultural initiatives in all strata of society as well as facilitating access to education and culture for all segments of the population. The Cultural Charter for Africa encourages African Union Member States to rehabilitate, restore, preserve and promote cultural heritage while developing , within itself, all the dynamic values and rejecting anything that is a hindrance to progress. It also supports its protection at both legal and practical level under the best standards applicable in these areas.

## 2.2.3 East African Community Frameworks

The EAC Partner States have undertaken, in Article 5 of the Treaty for the establishment of the Community, to cooperate in the development of policies and programs aimed at widening and deepening cooperation in social and cultural fields, among other areas for their mutual benefit. Furthermore, the Partner States commit to strive towards attainment of sustainable growth and development through

the promotion of more balanced and harmonious development. In Article 119 (c) of the Treaty, the Partner States undertake to cooperate in the promotion of cultural activities, including the fine arts, literature, music, the performing arts and other artistic creations and to forge close co-operation with respect to the development of mass media programs on matters that will promote culture within the Community. The objective of this cooperation is to promote a people- centered mutual development and to strengthen and consolidate the long standing ties and associations among citizens of the region.



*These beautifully woven table mats are a fine addition to your house décor, exuding great elegance and charm. Made of river grass strips and cotton yarn, the grass grows in river beds and has been used for making a variety of multipurpose mats for generations*

## 2.3 Economic Context

### 2.3.1 Global Economic Context

Over the past decade, the creative industries economy has been embraced enthusiastically as a new growth model (UNCTAD 2013). This has particularly been the case in places where natural resources are exhausted or non-existent, or where high laboratory or real estate prices make manufacturing industries uncompetitive.

Evidence from available literature also shows that the creative economy is growing from strength to strength as a driver of development. The creative industries are amongst the main dynamic sectors of world trade according to the International Trade Centre (ITC, 2014). Figures published by UNCTAD (May 2013) show that world trade in creative goods and services totalled a record US\$ 624 billion in 2011 and that it more than doubled from 2002 to 2011. The average annual growth rate during that period was 8.8 per cent. According to the Creative Economy Report 2010, world exports of creative goods and services are growing quickly and had reached \$592 billion in 2008 with an annual growth rate of 14 per cent during the 2002-2008 periods. Growth in developing-country exports of creative goods was also strong, averaging 12.1 per cent annually over the period 2002 to 2011. In the UK, gross value added of the Creative Industries was £71.4 billion in 2012 and accounted for 5.2 per cent of the UK economy, with a growth of 15.6 per cent since 2008, creating 1.68 million jobs in 2012 which is 5.6 per cent of the total number of jobs in the UK (United Kingdom, 2014). South Africa reported 3.7% annual growth for creative goods during 2005-2012, which generated revenues from the industry of about US \$9.2 billion in 2012 (UNCTAD, 2012).

UNCTAD research<sup>4</sup> revealed that the share of developing country exports in the world trade of creative goods and services has grown steadily in recent years, with total exports reaching US\$ 631 billion in 2011. The bulk of these exports is being produced in large and medium-sized cities and comprises arts, crafts and design products.

The creative industries across the globe are said to have exhibited high level resilience in the face of the economic downturn. The 2010 UNCTAD report indicates that in 2008, the eruption of the world financial and economic crisis provoked a sharp drop in global demand and a contraction of 12% in international trade. However, the report notes, world export of creative goods and services continued to grow, reaching \$592bn in 2008, more than double the 2002 level indicating an annual growth rate of 14% over six consecutive years.

The above notwithstanding, there is not enough data available for the creative services to illustrate their clear status. Services are however essentially significant for most economies in Africa. Because of this, two main sectors are briefly examined by most studies on the creative economy: the art and craft and the tourism sectors. This is largely explained by their close linkages with the rural creative economy in least developed countries.

In terms of trade, the European Union is a leading exporter of creative products/ goods at US\$ 150 billion and creative services at US\$ 120 billion in 2013. The Eurostat Cultural Statistics report in 2011 found that in 2009 the EU-27 exported more cultural goods to the rest of the world

<sup>4</sup> The UNCTAD/UNDP Creative economy report 2010 is a substantial body of work which resulted from the technical cooperation project 'Strengthening the Creative Economy for Development' between the UNCTAD Creative Economy Programme and the UNDP Special Unit for South-South Cooperation



The Kitenge is an East African cotton fabric printed in various colours and designs with distinctive borders, used especially for women's clothing.



than it imported, recording a trade surplus of around €1.9 billion. The main products exported were books, works of art, antiques, newspapers and DVDs. The growing domestic consumption market and its intensive promotion through advertisements may be contributing to the rise in imports. However, more emerging economies like China, India, and Malaysia are increasing exports of creative goods and services.

In 2012<sup>5</sup>, the real GDP of most rich economies which are the main consumers of creative goods was still below its level at the end of 2007, whereas the output of the emerging economies has jumped by almost 20 per cent. The latter accounted for 38 per cent of world GDP (at market exchange rates) in 2010, twice its share in 1990 and this was partly explained by growth in production and trade of creative goods and services. If GDP is instead measured at purchasing-power parity, the picture is that emerging economies had already overtaken the developed world in 2008 and are thought to have reached over 50 per cent of world GDP in 2011. These emerging economies now account for over half of the consumption of most creative commodities, world exports and inflows of foreign direct investment.

In terms of Global share, depending on how they are defined, the creative industries are estimated to represent anywhere from 3% to 12% of global GDP by 2012. In tough times for ageing economies, many politicians and business leaders look to the creative industries as a means of creating fast growth with a relatively low initial investment in soft infrastructure. They see these industries as a way of achieving stylistic and

technological innovations, as well as advances in knowledge and economic development. Yet the creative economy is not simply limited to the creative industries. Rather, it comprises an entire cultural environment; one that generates benefits that may be slightly intangible, but nonetheless are clearly felt across society.

In terms of revenue creation, creative industries have been generating increased revenue from the production, trade and distribution of their goods and services, as well as from the collection of copyrights associated with their use. Staines and Mercer (2013) note that:

- Exports of creative goods accounted for the vast majority of world trade of creative industries (69% in 2008) recording an annual growth rate of 11.5% between 2002 and 2008.
- Exports of creative services represent a smaller proportion of the world trade of creative industries (31% in 2008). The study shows a higher annual growth rate of 17% over the 2002-2008 period but this also reflects the growing number of reporting countries in the statistical data.
- The creative industries are opening up new opportunities for developing countries to leapfrog into high-growth sectors of the world economy and increase their participation in world trade.
- The creative industries are driving trade and development gains in a growing number of countries, in both developed and developing countries, particularly in Asia.

In terms of growth trends and potential, the number of products created and sold under the cultural economy throughout the world is increasing every year. Similarly, the growing international trade of these cultural products constitutes an important part of the global economy. According to UNCTAD (2005), the global market value of industries with strong creative and cultural components had been estimated at US\$ 1.3 trillion. Since 2000, the industry has grown at an annual compound rate of over 7%. Cultural and creative industries had also taken up a key position in the countries of the Organization for Economic Co-operation and Development (OECD), with an annual growth rate of between 5% and 20%, as well as in a number of leading developing countries and countries in transition (UNCTAD, 2004).

According to UNCTAD's Creative Economy Report (2010), in 2008, the world's 10 leading exporters of creative goods were: China, USA; Germany; Hong Kong, SAR, Italy, United Kingdom, France, Netherlands, Switzerland and India. Among the top 20 exporters of creative goods on this list appear to be Turkey, Mexico, Thailand and Singapore. African exports of creative goods increased from USD740 million to USD 2.2 billion during the period 2002-2008. Africa contributed marginally (0.6 per cent) to world exports in 2008. Egypt was the largest African exporter, followed by South Africa, Tunisia, Morocco and Mauritius in that order. The rest of the key players in developing countries included China, Hong Kong, SAR, India, Turkey, Mexico, Thailand, Singapore, United Arab Emirates, Republic of Korea, and Malaysia. Nine (9) of the top 10 exporters of creative goods among developing economies are in Asia, with China topping the list in this group and at the same time, leading in the world. Below in Table 2 is a summary of leading exporters by 2012.

**Table 2: Top 15 Creative Goods Exporting Countries in the World**  
(Based on Global Shares, 2003 and 2012 (Exports in \$ million at current exchange rate))

2003				2012			
Rank	Country	Export	Share %	Rank	Country	Export	Share %
1	China	38,180	17.1	1	China	151,182	31.9
2	United States	17,887	8.0	2	United States	37,884	8.0
3	Italy	17,541	7.8	3	Germany	28,719	6.1
4	Germany	16,519	7.4	4	India	25,846	5.5
5	UK	14,520	6.5	5	UK	23,083	4.9
6	France	10,137	4.5	6	France	19,774	4.2

Source: Based on data from UNCTAD stat. 2013

In 2003 China was the leading exporter of creative goods and services accounting for 17.1% of total exports. China remained, and increased its share, as a leading exporter in 2012 accounting for 31.9%. This was followed by USA at 8.0% and remained in second position with neither growth nor decline in share at 8.0% in 2012. Germany overtook Italy but with a decline in share from 7.4% to 6.1% in third

position and India emerged in the 4th position replacing UK, Italy and France.

Design was the largest sub sector for creative goods exports (60%) in 2008. Nine EU Member states were in the top 20 exporters of creative goods worldwide and six of these EU countries feature in the top ten developed economies. In 2008, Germany was the top developed economy exporter of both Performing Arts and Publishing & Printed Media; Italy was the top developed economy exporter of Design and Fashion, and the UK, France and Germany featured in the top five exporters of Visual Arts. Creative goods exports from the EU in 2010 represented 36% of the total value of creative goods exports worldwide, a small decrease since 2008 when they took 40% of total value.

Cultural and social diversities for long assumed to be the bane of national integration are now proving to be major resources for economic development. Cultural industries form the core of creative Industries which have shown a consistent growth rate despite the economic slowdown in the latter half of the last decade. However, the sector still remains underdeveloped in most developing and least developed economies including EAC countries due to the lack of a comprehensive policy framework and strategies to promote this sector.

The substantial growth of cultural and creative industries has run parallel to expanding international trade in cultural goods and services. It is therefore important that EAC Partner states consider mechanisms in which culture and creative industries can be enhanced to promote social and economic development in the region. This report will henceforth foster understanding

of the potential of culture and creative industries across the East African region.

### 2.3.2 Africa Economic Context

Across the African continent, cultural and creative industries have seen rapid growth in recent years.

UNCTAD's Creative Economy Report (2008) suggested that Africa contributed less than 1% to world exports of creative goods. However the report argued that this low number may be explained by the limited support capacity that exists on the continent, as well as by the fact that most of the cultural industry production in Africa takes place in the informal sector. It should be noted that even with respect to the formal economy, figures relating to the creative economy, mostly collated by large international federations tell only part of the story, as the bulk of commercial activity of these industries is in the hands of micro, small and medium enterprises (SMEs) and independent producers who often do not collect statistics on their businesses.

It is in the informal sector that the African creative economy is the most vibrant. The informal sector in Africa has its roots in traditional arts and crafts and rural production, a phenomenon that goes back to the pre-colonial period. Connected to this, is the high rate of population growth that the African continent continues to experience. Most of the growth in countries where economic growth was the highest between 2001 and 2010 has taken place principally in the extractive industries.

The UNCTAD/UNDP Creative Economy Report (2010) also revealed that key contributors to

Africa's 1% share of the global creative economy are the North African countries and South Africa. The findings of that report point both to underinvestment in the creative and cultural industries on the continent, as well as its potential for growth. The report further states that, the growth of culture industries at 7% globally is a confirmation that the creative industries hold great potential for developing countries that seek to diversify their economies and leapfrog into one of the most dynamic sectors of the world economy.

Much as Africa's slice of the creative economy pie is still very small (less than one per cent), there are some leading lights to show the way. One example of this scenario is Nigeria's rambunctious film industry "Nollywood" exports to the continent and beyond. Industry officials claim that it is the country's second largest employer after agriculture. Senegalese musicians, combining traditional musical styles with modern recording, have gained a good foothold in the global market through sales and touring. Cape Town is also concentrating creative, technology and business talent in one neighborhood.

The creative industries are particularly interesting for Africa. For instance, they can help economies diversify and avoid an overdependence on limited natural resources. Africa's rich artistic heritage and cultural traditions are bottomless wells of inspiration. Unemployment in crowded cities is a real problem in Africa but youth are exploiting this chance through talents like music and performance like in Uganda to date. Creative industries can be part of the solution to unemployment in cities (Uganda UNATCOM Report 2009). They thrive on the friction of diverse people and ideas in one place and the

burgeoning urban middle classes offer a ready domestic market. Creative dazzle would also help foreign investors see Africa differently as a fertile land for good ideas, not just coffee, Tea and cocoa in addition to burgeoning poverty that has often characterized the continent as a label.

It is unfortunate that Africa's contribution to this vast industry is negligible. The continent has a deep pool of talent but lacks the infrastructure and capacity to commercialize its creative talent and reap the vast fortunes that are lying in wait. In recent times, there has been much talk about the potential of the creative and cultural industries to contribute to Africa's economic growth and thus to the realization of the Millennium Development Goals which resonate loudly with the African region. Interestingly, the initiative for culture and development (not cultural development) started in Africa years before UNESCO recognition. Good examples include The Accra Conference of 1975, the Lagos Plan of Action of 1980 and the Lome Agreement of 1984, all of which discussed and agreed on the essential nature of culture for the sake of African development (Diagne & Ossebi, 1996, p. 29).

The UNCTAD Report of 2008 shows the potential of creative industries to inspire the development of national economies of Africa. Relating creative industry and culture will offer an avenue to relate development and economic growth. The symbiotic relation between culture and development can justify the contribution of culture in African national economies. According to Falola (2003) "few people disagree that culture is important in seeking answers to Africa's economic underdevelopment" (Falola, 2003 p. 8). Njogu & Mugo-Wanjau (2007) also submit that

“when used as a dynamic process, culture could be a tool for social change and art can be used for the creation of awareness, behavior modulation, advocacy, therapy and the mobilization of social support (Njogu & Mugo-Wanjau, 2007 p. 189)

### 2.3.3 The EAC Regional Economic Context

#### 2.3.3.1 The Economy of EAC

Economic performance of the East African Community (EAC) countries during the past decade has been impressive. Table 3 below summarizes the picture by giving a comparison of Population, GDP and External trade performance of the EAC partner states in 2014.

Table 3: Population, GDP, and External Trade of EAC Partner States Compared 2014

	Kenya	Uganda	Tanzania	Rwanda
POPULATION (Million)	45	36	50	12
GDP (Billion USD)	45.3	22.6	31.9	7.7
GDP per capita (USD)		1,500	1,700	1,500
GDP Growth	4.7%	5.6%	7.0%	7.5%
Exports (Billion USD)	6.6	3.2	5.9	0.5
Imports (Billion USD)	15.9	4.9	11.2	1.9

Source: CIA Sources: CIA (Central Intelligence Agency), ASEA (African Securities Exchange Association), Bloomberg, 2014.

As Table 3 above shows, GDP growth rates ranged between 4.7% in the case of Kenya and 7.5% in the case of Rwanda.

The EAC's (un-weighted) average growth rate between 2004 and 2013 is in the top one-fifth of the distribution of 10-year growth rate episodes experienced by all countries worldwide since 1960. Such performance is even more remarkable taking into account that the past decade encompasses the global economic and financial crisis that began in 2007. The East African Community (EAC) bloc earns a whopping USD 2 billion from its creative industry every year, nearly 20 times the annual budget of the Arusha-based regional organization. The industry has been described as one of the most rapidly growing sectors not only in income, but also job creation as well as export trade.

#### 2.3.3.2 Gross Domestic Product growth rate

According to the EAC Trade report 2013, there is a positive trend in the intra-EAC trade and investment. The report shows that intra-EAC trade continued to exhibit positive trend by posting a growth of 6.1% in 2013 compared to trade recorded in 2012. Burundi posted the highest intra trade growth rate of 91.5 percent which is an indication of improvement of Burundi's participation in regional trade. Table 4 below summarizes GDP growth rates of the region.

Table 4: Real GDP growth rates 2005- 2013

Partner States	2005	2006	2007	2008	2009	2010	2011	2012	2013
Burundi	0.9	5.5	3.6	4.5	3.5	3.9	4.2	4.2	4.8
Tanzania	7.4	6.7	7.1	7.4	6.0	7.0	6.4	6.9	7.0
Uganda	10.0	7.0	8.1	10.4	4.1	6.2	5.9	3.6	4.7
Kenya	5.7	6.1	7.0	1.5	2.7	5.8	4.4	4.6	4.7
Rwanda	7.2	6.5	7.9	11.2	6.1	7.5	8.6	8.0	4.6

Source: EAC Facts and Figures (2014)

Note: Rates for Uganda were compiled using GDP in local Currency

In 2013, Tanzania recorded the highest economic growth rate of 7.0% followed by Burundi and Kenya with 4.8% and 4.7%, respectively; that of Burundi increased from 4.2 % ( 2012) to 4.8 (2013) while for Kenya increased from 4.6 % to 4.7%. Kenya has the highest per capita income of US\$ 1,055.2 while Burundi recorded the lowest at US\$ 294.2. Except for Rwanda, all other countries experienced an increase in GDP growth rates in 2013.

Table 5: Real GDP, Million US dollars

Partner State	2008	2009	2010	2011	2012	2013
Burundi	836.8	1,331.0	1,499.1	1,243.0	1,135.7	1,103.0
Tanzania	12,395.2	11,907.4	11,941.1	11,396.3	12,149.3	12,825.0
Uganda	11,000.1	9,705.5	9,613.4	8,794.7	9,210.3	9,338.1
Kenya	19,613.6	18,015.3	18,620.7	17,334.5	19,054.6	19,578.4
Rwanda	3,682.0	3,852.1	4,032.6	4,231.5	6,721.5	6,670.8
EAC	47,527.6	44,811.3	45,706.9	43,000.0	48,271.4	49,515.2

Source: EAC facts and Figures 2014

The 2013 figures in Table 5 above show that Kenya emerged with the highest real GDP of US \$ 19,578.4, followed by Tanzania US \$12,825.0, Uganda US \$ 9,338.1, Rwanda US \$ 6,670.8 and Burundi US \$ 1,103. In comparison to the performance of 2005, Burundi's real GDP has stagnated in the same range over a nine year period, while Tanzania experienced a 19% increase, Uganda experienced a 12% increase, and Kenya had a 26% increase. Rwanda, on its part, experienced a super normal increase of 299% in the same period. Between 2008 and 2013 real GDP of Partner states increased slightly. There was a contraction between 2008 and 2011.

Table 6 below gives GDP figures at market prices comparing them by country across a period of 7 years from 2005 to 2011.

**Table 6: GDP at current market prices, Million US dollars**

Partner State	2005	2006	2007	2008	2009	2010	2011	Share
Burundi	796.1	908.4	936.1	1,108.3	1,330.8	1,498.1	2,296.5	3
Tanzania	14,220.4	14,331.2	16,992.5	20,715.3	21,368.4	22,914.6	23,877.4	28
Uganda	10,040.0	11,011.0	13,548.7	16,377.4	16,545.8	17,719.6	18,088.8	21
Kenya	19,133.0	22,779.2	27,022.3	30,467.4	30,600.2	32,181.3	34,058.7	40
Rwanda	2,390.7	2,854.0	3,411.3	4,689.0	5,265.9	5,628.5	6,377.4	8
<b>EAC</b>	<b>46,580.2</b>	<b>51,883.9</b>	<b>61,910.9</b>	<b>73,357.3</b>	<b>75,111.0</b>	<b>79,942.1</b>	<b>84,698.8</b>	<b>100</b>

Source: EAC Facts and Figures 2014.

From Table 6 above, EAC countries had a combined GDP of USD 84,698 in 2013 which grew by double margin from USD 46,580 in 2005. It also shows Kenya as the biggest economy in the region with a 40% share of the total regional GDP.

### 2.3.3.3. Cultural and Creative Industries in EAC

Cultural Industries in East Africa are largely informal, historical, dormant and less supported by national economies of Partner States. The East African Community has the potential to create wealth from its rich cultural heritage, but its creative industries are marginal players in the global market. The Partner States are involved in production and export of different creative goods such as arts and crafts and other culture industries like music, film and theatre, sports among others. However EAC countries remain net importers of creative goods and services especially from Europe and Asia.

There is no doubt that within the EAC Partner States, there is an abundance of creative talents and rich cultural assets with a huge economic potential for culture and creative industries to promote economic growth, job creation, social inclusion, and export earnings. While the East African Community (EAC) Partner States have produced world-renowned artists, the contribution of creative and cultural industries to the economy has still remained insignificant. Likewise, due to lack of incentives, financial,

educational, infrastructure and technology support from the EAC Partner States and the business community, the local creative industries are not yet fully developed.

At present, music is arguably the most prominent sector of the creative economy in East African countries. It is clear that while there is a significant presence of the media and popular entertainment, achieving the potential economic gains remains a major concern in EAC.

Weak or unreliable distribution networks for music and CDs, piracy, and a non-enforceable IPR regime results in a significant loss of revenue for both the artists and the national economy<sup>6</sup>. Much the same can be said for the nascent film industry, which has achieved a relatively recognized status. All of these developments and trends have emerged in an environment where there has been a rapid growth in the use of mobile phones and ICTs over the past ten years, together with an ongoing expansion of mass media in EAC for newspapers, lifestyle magazines, radio and television.

Numerous studies in the global north have affirmed the design, music, craft, film and television, fashion, publishing, heritage, cultural festivals and related components of the creative and cultural industries as key drivers of job creation, foreign exchange earnings, income generators and catalysts and supporters of other industries such as leisure, printing, tourism and transport. But much less has been documented at the EAC level.

<sup>6</sup> In effect, this underlines the challenge of reconsidering the principally economic rationale, regarded as necessary for soliciting government support and intervention in the sector, Bakari 2012

Article 119 of the Treaty for the establishment of the EAC requires Partner States to promote close cooperation amongst themselves in culture and sports. For culture, the Treaty notes the need to promote cultural activities including fine arts, literature, music, performing arts and other artistic creations along with the conservation, safeguarding and development of the historical materials and antiquities. In Article 119 (c) of the Treaty, the Partner States undertake to cooperate in the promotion of cultural activities, including the fine arts, literature, music, the performing arts and other artistic creations. The Partner States further undertake to forge close co-operation with respect to the development of mass media programs on matters that will promote culture within the Community. The objective of this cooperation is to promote a people centered mutual development and to strengthen and consolidate the long standing ties and associations among citizens of the region.

The EAC Common Market Protocol (CMP) which came into force in July 2010 aspires to accelerate economic growth and development in pursuant of the vision of widening and deepening cooperation among the Partner States in the economic, social and cultural fields. Under efforts to actualize Article 43 of the Protocol, the Partner States undertake to foster cooperation in the field of intellectual property rights and in the promotion and protection of creativity and innovation for economic, technological, social and cultural development in the Community.

World trade in culture and creative industries has shown an unprecedented growth as compared to other sectors in recent years. As this growth is likely to continue in the coming years, EAC Partner States will have even more ways to

benefit from this trade opportunity to realize development gains while fostering, protecting and promoting their creative economy.

The need to reinforce linkages between creative investments and business in EAC, enhancing creative capacities, skills training attract investors from domestic and global markets who also support creative entrepreneurship (startups, micros). In EAC there is need to improve labour and social laws (contracts, pension), revisit legislation for intellectual property rights, new business models for creative enterprises (internet law), explore new markets and foster North-South trade for culture and creative goods and services.

Much as EAC Partner States are still big net importers of cultural products, there is need to seize the available opportunities to improve the status quo. The rise of the digital economy and the increasing commercialization of the arts and culture globally create a window of opportunity for the region. These industries also offer more sustainable development options than traditional exports because the sector draws on the creativity of local artists and entrepreneurs, generating higher levels of local value-addition.

Available studies continue to indicate that the relative vibrancy of the existing 'creative economy' is due much more to what can be recognized as individual entrepreneurship and market forces, rather than to any coherent national policies. As one study indicates for example, in Tanzania, there is noticeably "a weak implication of the State in promoting reforms toward the development of the cultural sector" ( See Carola Kinasha & Laurent Héau, August 2008).

In Uganda, Music and Film subsectors have grown exponentially with no coherent policy, no regulatory support and no funding from the state. Evidence available suggests that government support for the 'creative economy' has tended to be allocated to administrative and "management" activities, rather than to enabling activities which support implementation and production in the sector. This study concurs with Bakari (2010) that responding to the needs of the sector from a regional perspective provides a framework for more appropriate policy responses at country level in EAC which of necessity, should be conceived and designed to bring institutional coherence to technology and its critical value in the "creative industries"; copyright laws and intellectual property protection; education and research as well as financing of the culture and creative enterprises.

Imagery on clothing or traditional attire worn in the region has different meanings. Chiefs, traditional healers, elderly men, women and children wear clothing with different symbols to show their status or positions in society as well as to signify the occasion. A distinctive feature of traditional African dress is its use of festive coolers, intricate patterns, headgears and figurative symbols to communicate meaning.



# CHAPTER 3: FINDINGS



The Kikoi is a distinctive East African striped cloth with an end fringe.

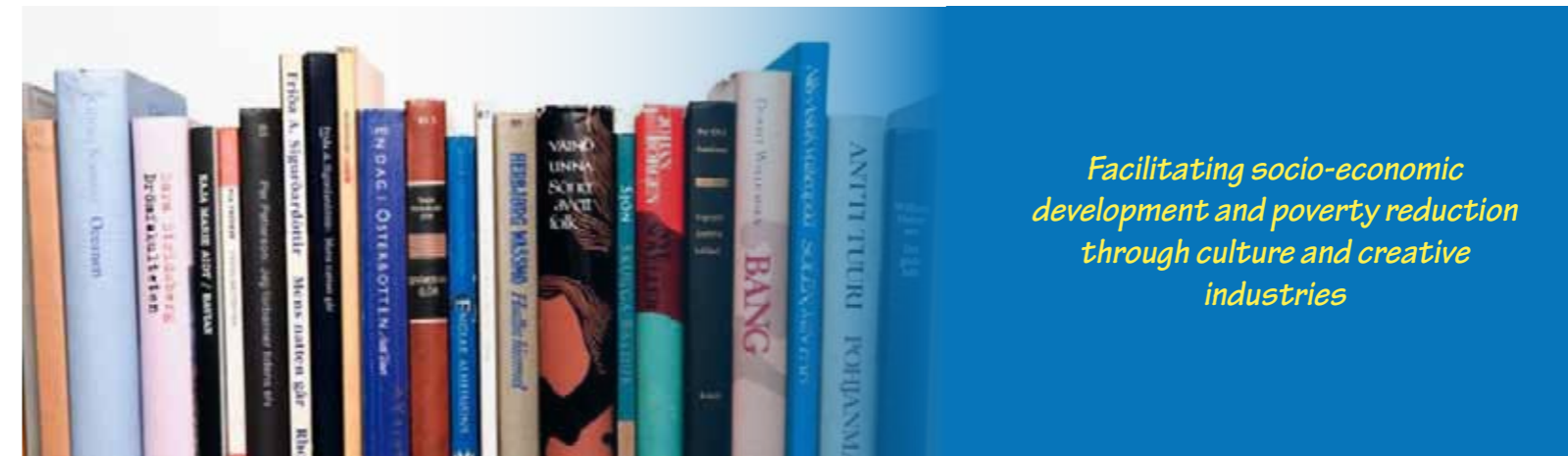
## 3.1 Introduction

This chapter presents in summary the ongoing efforts in the region to strengthen the cooperation among Partner States through the development and promotion of Cultural and Creative industries in the EAC. It provides baseline information which will be used in the formulation of regional culture and economic policy and planning.

Data used in this chapter came from separate but regionally coordinated studies conducted in five individual partner states including Uganda, Kenya, Tanzania, Burundi and Rwanda.

Findings are presented to highlight the following aspects in line with the Terms of Reference to this exercise:

- i. Sectors within the EAC creative industries that have the potential to form different clusters
- ii. Characteristics of the various creative industry “sectors”, key players and policy environment in each of the EAC Partner States
- iii. National Statistics of Culture industries (in terms of Exports, Employment, Contribution to GDP and Infringement) and International Statistics (in terms of foreign sales, use of works, competition, marketing Intelligence Infringement and media value)
- iv. Socio-economic data of the regional creative businesses



*Facilitating socio-economic development and poverty reduction through culture and creative industries*

- v. Critical issues and challenges by sector that culture and creative industry businesses face in the region

## 3.2 Potential of Culture and Creative Industries Sector

### 3.2.1 The Potential of Culture and Creative Industries in East Africa

In terms of potential, the culture and creative industries in East Africa are providing employment, generating revenue for the economies through taxes and foreign exchange earnings. They are also facilitating socio-economic development through poverty reduction. There is almost no data on the number and quality of jobs generated by the creative economy in the region, but anecdotal evidence suggests that it is an important source of livelihoods for many artists and others in the value chain which their art supports (producers, distributors, etc). Considering that more than 40% of operatives are women (See Table 9 in section 3.3), and given the gender face of poverty in most EAC countries, the development of the sector offers a chance for income generation among women who are skilled and talented in culture and creative areas.

However, this potential can only be realized if the

sector is targeted for clear policy and institutional support by the concerned Governments and their development partners. The Kenya mapping report observes correctly that globally, the creative economy has taken centre stage both in revenue generation and as a vehicle for enhancing social cohesion and integration but is quick to mention that the African continent still lags behind in realizing the potential of this sector largely because the sector lacks clear policy and institutional support to realize its potential.

Despite this observation, it is worth noting that there are some efforts in the region to facilitate growth of this potential. The 4th EAC Development Strategy prioritizes the development of culture and creative industries and commits to the creation of an enabling environment for private sector investment in culture and sports industries so as to foster creation of employment and improvement of household incomes. The strategy envisions the strengthening of collaboration between the EAC and international organizations such as UNESCO and FIFA, in the promotion and development of Culture and Sports (East African Community, 2011).

In addition, according to EAC Facts and Figures 2013, Partner States have attempted to capture and describe the major components of the cultural sector. This document identifies and

profiles cultural venues and activities including art galleries, museums, animal/marine parks, botanical gardens, libraries, popular and classical music concerts. Other areas captured are theatres, dance opera or musical theatres; and other aspects of performing arts. It is however worth noting that the statistics on these activities and cultural spaces/venues have been scanty over the years and often affects or limits policy making and support by Governments in Partner States. This calls for corrective measures to be undertaken at a regional and country level to enhance collection of statistical information on the economic contribution of culture and creative Industries annually like any other sector such as agriculture and manufacturing.

Further, member states of the EAC have already adopted and included the sector in mainstreaming development frameworks. For instance in Uganda promotion of culture for socio-economic development is recognized and captured under Vision 2040. In Kenya, Government recognizes the importance of the cultural and creative industries to development. As a result, Kenya's development blue print Vision 2030 identifies the preservation and promotion of cultural and national heritage as critical to socio-economic, political and cultural development. Similarly, Culture has been captured in Rwanda's Vision 2020, Burundi Vision 2025, Burundi National Development Plan and Tanzania National development Plan.

According to the EAC Treaty, Article 119 of the Treaty for the establishment of the EAC requires Partner States to promote close cooperation amongst themselves in culture and sports. For culture, the Treaty notes the need to promote fine arts, literature, music, performing arts and other artistic creations along with the conservation, safeguarding and development of historical materials and antiquities. Furthermore,

the Treaty emphasizes the regulation of cross border trade in ethnographic materials, licensing of antique dealers and adoption of a common approach and cooperation in tackling the illicit cross border trade in cultural property. Repetition The sector has key opportunities that could help in its further growth if taken advantage of. The rise of the digital economy and the increasing commercialization of the arts on the other hand have created a window of opportunity for the EAC to exploit the latent economic potential of the creative economy and to explore sustainable options for socio-economic development. The Aga Khan University of Arts and Sciences plans to contribute to the cultural and creative industries job market in the Greater Horn of Africa ( EA Member States plus Somalia, Ethiopia, Djibouti, South Sudan, the Sudan and the Democratic Republic of Congo) through a new university in Tanzania.

In Rwanda, the Government, through its Ministry of Commerce (MINICOM) has prepared a strategy and policy paper on the craft industries sector. Since the end of the civil war, Rwanda's government worked closely with international partners to establish a platform for promoting the creative industries. Since 1998, Rwanda has been hosting the Pan African Dance Festival (FESPAD), a biennial dance and music festival that has grown exponentially through the years.



In August 2006, Rwanda's Ministry of Youth, Culture, and Sports collaborated with the World Culture Open, UNDP, and FESPAD to host an international conference on creative economies for development in Kigali. These types of forums created an enabling environment for the country to begin active support for the types of cultural policies.

### 3.3 Characteristics of various sectors and players

#### 3.3.1 Industry Structure

This section presents information about the structure of the culture and creative industry sector in the region. The concept 'Industry structure' pertains to the number and size distribution of competitors in an industry. To these two variables, this report has added the products/ service offerings by the actors in the industry.

East Africa is nourished by its rich history, as well as the amazing tapestry of its vibrant culture. Over the last 10 years, East Africa's creative and crafts industry has been growing in both structure and size. The work of rural women from the countries whose embroidery now adorns international retail chains and boardrooms of so many corporate organizations is only the tip of the iceberg. There is a nascent but fast growing film industry in Rwanda, Kenya, Uganda and the United Republic of Tanzania. The music industry Partner States is becoming more sophisticated and has displaced the traditional dominance by the Democratic Republic of the Congo and West Africa.

In Uganda, the Census of Business Establishments (COBE) registered a total of 12,472 institutions involved in the cultural and creative industries

(Report on the mapping of culture and creative industries in Uganda, 2014). In Burundi, the final national report of results from the Mapping Study for Culture and Creative Industries (2013) mentions in its summary of indicators that there are 1864 registered actors in the industry. In Rwanda, the Baseline Research on Cultural and Local Content Production in Rwanda's Media Sector (2013) revealed that the country has 32 privately owned newspapers and 18 radio stations operating side by side with the state-owned broadcasting and newspaper institutions as well as four international radio stations broadcasting locally on FM to Rwanda in Frequency Modulation (FM). The situational analysis of Rwanda's the handcraft mentioned 420 associations comprising 7,113 organized craftsmen members. Figures of the registered actors in the industry were not readily available from the national survey reports of Tanzania and Kenya.

A further look at the cultural and creative industry of the EAC region from a product and service offering perspective revealed a presence of actors across all the domains - Cultural and Natural Heritage; Books and Press; Performing Arts and Celebrations; Visual arts and crafts; Audiovisual and Interactive Media; Design and Creative services; Culture Tourism; Sports and Recreation; Intangible Cultural Heritage - in all the countries except Burundi which reported a significant absence of registered actors in the areas of culture tourism; traditional sports and recreation as well as and the Intangible Cultural Heritage.

Looking at the size of actors in this industry from the perspective of their incomes and revenues from sales of their products, it was observed that in Burundi, the cultural industries are not yet developed. According to the Burundi National Mapping Report, in 2012, just over

Sauti za Busara is an African music festival held annually in Zanzibar, Tanzania. Sauti za Busara brings people together to celebrate African music under African skies.



©Sauti za Busara



The Kitenge is an East African cotton fabric printed in various colours and designs with distinctive borders, used especially for women's clothing.

half of operators in this sector earned not more than US \$ In Uganda, the National Mapping Report indicates that overall, 59% of cultural and creative enterprises had gross revenues not exceeding US\$ 5,000. and that only 6% of enterprises in the sector had gross revenues/incomes in excess of US\$ 500,000. Kenya, on the other hand, reported from its national study that the majority of individuals (at 63.5 per cent) in the cultural and creative industries earned less than US\$ 5,001 while 0.9% earned over US\$ 500,000 during the year. This trend is also similar to that of institutions in the cultural and creative industries in Kenya.

In terms of market coverage, culture and creative industries utilized mainly the national markets for products and services produced. For instance, 16.4% of culture goods and services produced in Kenya are traded in national markets with 30.8% in local markets in Kenya; in Uganda, 37.1% are traded in national markets and 83.7% in local markets; in Burundi, local market coverage is 27.1% while national market coverage is 64.3% and in Tanzania Local market coverage is 38.8% and national market stands at 72.4%. Revenue generated range mainly under USD 5000 Annually. Companies earning this revenue threshold account for 80% in Kenya, 58.5% in Uganda, 75.6% in Tanzania, 48.9% in Rwanda and 46.2% in Burundi.

Revenue generated from Culture and Creative industries is largely dominated by Small and Medium size Enterprises (SMEs) with limited earnings. For instance in Uganda, between 2004 and 2008, Uganda exported cultural goods and services worth US\$239,095,546 approximately Ug.shs.427.27 billion (UBOS: 2009). In the same period, imports of cultural goods and services were approximately US\$600 million. This is an equivalent of Ug.Shs.1.17 trillion. Export is high in museum and heritage sites (35%) because the sector depends on tourists, followed by artisan

products (16%), multimedia (14%), visual arts (11%) and music (10%). In terms of tax revenue, creative goods and services contributed Ug.Shs.12.6 billion (US\$6.7million) between 2006 -2009, and import duty alone contributed Ug.Shs.8.6 billion (US\$ 4.5 million. The market of Uganda products is mainly North America, United Kingdom, Germany, France and Australia followed by the regional markets of EAC and COMESA.

In Kenya, the Kenyan music industry is estimated to be worth Kshs. 6 billion by the World Bank report (Maiyo, 2012). According to the society's records, public transport vehicles are charged Kshs. 2000/= (USD 24) per year for the music they play in their vehicles. Small and medium enterprises such as beauty parlours and hotels are charged between Kshs.1500 and Kshs.2000 (USD 18-24) per annum. Branding companies are charged Ksh.3000 (USD 36) per day while mobile facilities like road shows are charged Kshs. 10,000 (USD 120) per day for the music they play while conducting their business. The radio advertising is fiercely competitive in the country, all of them running to advertise consumption goods and services. According to the Central Bank Report (2008), radio stations attract 40% of all advertising receipts today, followed by print media at 34%, TV at 25%. The same report estimates that in 2003 the advertising receipts income was in the tune of Kshs. 6.741 billion.

The Financial report of Kenya Film Commission (2011) observed that direct contribution to the Kenyan economy by this industry stood at Kshs.1,925.3 million (<1%) while the indirect contribution was Kshs.53,143.6 million (2.56%). The induced contributions from partial industries were Ksh 16,718 million (0.0804%). The motion pictures and related industries have been recording moderate growth with earnings by the industry increasing from Kshs.281 Million in 2004 to Kshs.357.6 Million in 2009. In 2009, the



industry employed 4,103 people which increased by 25% from 2005. Between 2005 and 2009, the total wage earnings in the industry increased by 40%.

In Tanzania there are few studies which have been done on Culture and Creative Industries. In September, 2012 the Study on Contribution of Copyright Industries to the Economy was conducted. This study generally demonstrated that copyright-based industries in Tanzania make a significant contribution to the national economy. According to the Study The copyright-based industries generated in 2007-2010 an added value of between TZS 391.635 and TZS 680.990 billion respectively, translating to a contribution of 3-4.6% to the gross domestic product (GDP). They also generated TZS 38.930 billion and TZS 83.686 billion as income to employees, or a proportion of 2.8 and 5.2% of the total national economic value, and employed 28,202 and 44,331 people, or 4.5 and 5.7% of the total national workforce.

The national backbone fibre optic cable has been laid throughout Rwanda connecting all of Rwanda's 30 districts and many public and private institutions to the Internet, thus creating a viable enabling environment. According to estimates, 100,000 people might have fulltime jobs against 850,000 who have part time jobs out of the total population.

It follows from the above that East Africa's creative industries remain relatively modest in size and visibility when compared to the West or South African industries.

### 3.3.2 Registration of Culture and Creative Industries across EAC

In this section, this report presents the distribution of Culture and Creative Industry Institutions by category of registration across the EAC Partner states. Available evidence shows that most enterprises are registered as private companies as seen in table 7 below;

Table 7: Distribution of institutions by category of registration

Category of registration	Kenya	Uganda	Tanzania	Rwanda	Burundi
Sole proprietorship	9.0	17.2	17.3	-	8.0
Partnership	19.3	14.8	35	-	1.0
Private company	13.6	60.2	31.2	-	46.0
Public company	4.9	2.1	4.1	-	11.0
Government Ministries	12.6	2.5	4.3	-	17.0
Others	29.6	3.2	8.1	-	17.0
Not Stated	11.1	0	0	-	0
<b>Total</b>	<b>88.9</b>	<b>100.0</b>	<b>100.0</b>	<b>-</b>	<b>100.0</b>

Source: Partner States National Status Reports 2013/14, 11.1% in Kenya not stated.

According to table 7 above, the biggest percentage of formally registered Culture and Creative Industry Institutions (CCII) are private sector companies. Very few of these institutions are registered as belonging to Governments. For instance, in Kenya 13.6% CCII are registered as private companies. Similarly, 60.2% of CCII in Uganda, 31.2% in Tanzania and 46% in Burundi are registered as private companies. Rwanda database did not provide the data. Government also plays a significant role through ownership of CCII. Its ownership stands at 17% in Burundi as the highest; Kenya at 12.6%; Tanzania at 4.3% and Uganda at 2.5% is the lowest.

### 3.3.3 Distribution of Industries by Domain, Country and Gender

This section presents an analysis of the distribution of culture and creative Industries across the EAC region by industry domain, country and gender. The National Status Reports provided the evidence as summarized in table 8 below.

Table 8: Distribution by Domain and Gender across Partner States

Domains	Percentage Distribution by Gender of Entrepreneurs or Operator									
	Kenya		Uganda		Tanzania		Rwanda		Burundi	
	Male	Female	Male	Female	Male	Female	Male	Female	Both Male & Female	
Cultural and Natural Heritage	1.2	0.0	18.4	9.5	0.9	0.8	1.6	7.0	5.9	
Books and Press	4.7	0.0	4.1	36.5	2.6	2.4	00	00	25.9	
Performing Arts and Celebration	20.9	20.7	8.2	6.4	62.5	55.6	27.9	23.4	34.7	
Visual Arts and Craft	27.9	27.6	8.2	17.5	17.0	7.3	14.2	2.5	7.6	
Audiovisual and Interactive Media	2.3	0.0	36.7	7.9	9.7	7.3	4.5	1.8	22.4	
Design and Creative Services	5.8	24.1	6.1	15.9	6.4	25	4.0	20.7	0.6	
Culture Tourism	1.2	0.0	0.0	1.6	00	00	00	00	0.6	
Intangible Cultural Heritage	36.0	27.6	18.4	3.2	0.3	00	00	00	0.6	
Other	0.0	0.0	0.0	1.6	00	00	00	00	1.6	

Source: National Status reports 2013/14. Utilised National datasets for Rwanda.

Based on Table 8 above, in Kenya, the majority of males active in the CCIs are concentrated in the Intangible cultural heritage domain (36%) and Visual Arts and Crafts domain (27.9%). Women in Kenya's CCIs, on the other hand, are more concentrated in the domains of Intangible cultural heritage (27.6%), Visual Arts and Crafts (27.6%) and Design & creative services (24.1%). In comparison, in Uganda, males are more concentrated in the domain of Audio Visual and Interactive media while females are more concentrated in Books and Press. In Tanzania more males are found in Performing Arts at 62.5% and females in the same sector at 55.6%. In Rwanda, more males are found in Performing Arts and Celebration domain with 27.9% while women are found in the same domain at 23.4% and Design & creative services at 20.7%. In Burundi both males and females are concentrated in three main domains of Performing Arts and celebrations (34.7%), Books and press (25.9%) and Audio Visual and Interactive media at 22.4%. It is also noteworthy that Performing Arts and Celebration is the most predominant domain in the region in terms of participation of both women and men players. Culture Tourism attracts the least level of participation.

### 3.3.4 Percentage Distribution of Population engaged in Culture and Creative Industries

This part presents the distribution of operatives and players under the Culture and Creative Industries in East Africa by gender, level of education and age. Analysis was done for a regional average and comparison was also done at each individual partner state level. Below in table 9 is the regional average and country distribution for males and females

Table 9: Distribution of CCI Operatives by Gender across the Industry in EAC

Country	Males	Females	
Kenya	74.8	25.2	100
Uganda	44.2	55.8	100
Tanzania	77.1	22.9	100
Rwanda	43.7	56.3	100
Burundi	80.2	19.8	100
<b>EAC Average</b>	<b>59.95</b>	<b>40.05</b>	

Source: Partner States, National Status reports 2013/14, Rwanda database

As shown in Table 9 above, both males and females are active in Culture and Creative Industries in East Africa. Participation in CCIs in the EAC region averages to 60% for male players in the industry compared to a regional average of 40% of female players. At a country level, in Kenya and Tanzania males dominate with the CCIs at 74.8% and 77.1% respectively. On the contrary, in Uganda and Rwanda females are the dominate the industry at 55.8% and 56.3% respectively. Burundi's female participation level in CCIs is much lower at 20%.

According to the national mapping reports conducted by the EAC partner states, the level of participation of women and men showed significant variations at the domain level. In Uganda, whereas more than half the males were in Audiovisual & interactive media, Cultural & Natural heritage and Intangible Cultural Heritage, the majority of females were in Design and Creative Services, Visual arts and crafts, and Books and Press. In Tanzania, whereas the majority of men were in Performing Arts Celebrations, Visual arts and crafts, Audiovisual and Interactive Media as well as Design and Creative services, the majority of women were in Performing Arts & Celebrations, Visual arts and crafts, Audiovisual and Interactive Media, as well as Design and Creative services. In Kenya, the majority of men were in Performing Arts Celebrations, Visual arts and crafts as well as Intangible Cultural Heritage while the majority of women were in Performing Arts & Celebrations, Visual arts and crafts, Design and Creative services, as well as Intangible Cultural Heritage. Burundi and Rwanda never returned results on this analysis.

Analysis was also conducted to compare the level of formal training of CCI operators in EAC among Partner States as shown in Table 10 below.

Table 10: Distribution of Individual by Formal Training

	Kenya	Uganda	Tanzania	Rwanda	Burundi
Primary Certificate	19.1	-	43.4	-	4.5
O-Level Certificate	27.8	-	38.3	-	36.4
A-Level Certificate	1.7	58.1	8.2	-	18.2
Post-secondary Certificate	13.9		10.9	-	18.2
Diploma	16.5	5.4	16.2	-	13.6
Degree and above	13.9	32.4	13.9	-	4.5
Other specify	7.1	4.1	5.3	-	4.5
<b>TOTAL</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>-</b>	<b>100.0</b>

Source: National Status Reports 2013/14, Data not available for Rwanda.

From the table above, across all partner states, most of the individuals operating in the industry have acquired at least an ordinary certificate of education. Only Uganda has a sizeable number (32.4%) of operators who have acquired a university degree and above. In Kenya and Tanzania, operatives with a degree and above stand at 13.9% each while in Burundi, only 4.5% have university degrees. The most represented level of education among CCI operators in Kenya is an ordinary level certificate while in Tanzania, the most represented group are the primary education level certificate holders at 43.4%. Burundi has the most represented group as the Ordinary level certificate holders at 36.4% while in Uganda, advanced level certificate holders stand out most represented at 58.1%.

Analysis done with respect to age distribution of individuals operating in the industry revealed a heavy presence of young people (age range 14 – 39) in the industry probably pointing to a rich future of

the industry. In Uganda, 48.7% of operators were found to be aged 14 – 30 years. In Kenya, 51.4% are below the age of 40 years. Burundi, Tanzania and Rwanda did not provide this level of analysis. A further look at the Uganda case which was the only country to give a cross tabulation of age of operators and domain, revealed that the 18 – 30 years age group was dominant in the domains of Performing Arts and Celebration; Audiovisual and Interactive media; Design and Creative Services; Books and Press; Cultural Tourism and Sports and Recreation. On the other hand, operators aged 31 years and above were dominant in the domains of Cultural and Natural Heritage and Intangible Cultural Heritage.

### 3.4 National Statistics of Cultural industries

#### 3.4.1 Trade in cultural goods and services

##### 3.4.1.1 Communications Channels used by Institutions

In this section, the report presents a comparison of communication channels used by institutions involved in Culture and Creative Industries in EAC. Focus of this analysis was put on comparing usage of the main modes of communication in the region namely telephone, fax, internet, post office, radio, television and newspapers and magazines. Table 11 below provides the details.

Table 11: Distribution of communication channels used by the institutions

Communication Channel	Kenya	Uganda	Tanzania	Rwanda	Burundi
Telephone (Mobile & fixed)	27.3	90.6	34.8	-	97.6
Fax	2.2	6.4	2.7	-	0.0
Internet	25.1	38.9	18	-	0.6
Post office	10.9	15.6	9.8	-	0.6
Radio	9.0	18.2	13.4	-	0.6
Television	8.0	6.4	9.7	-	06
Newspapers/magazines	10.0	19.0	8.4	-	0.0
Others	7.5	31.4	3.2	-	0.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>-</b>	<b>100.0</b>

Source: National Status reports 2013/14. Figures for Tanzania were calculated based on absolute data obtained. Rwanda had no data.

From table 11, it is noticeable that most institutions in the culture and creative industry communicate mainly through telephone across all partner states. Utilization of this communication channel by institutions in the industry stands at 97.6% in Burundi, 90.6% in Uganda, then 27.3% in Kenya and 34.8% in Tanzania. Telephone communication seems to be the most convenient, cheaper and easy to use. This is largely explained by the expansion and penetration of mobile telephony across the countries. The expansion of the mobile telephone sector has had an impact on the creative economy in the region. The other channels of communication dominant among institutions include internet, radio, post office, newspapers and magazines. The facsimile (fax) was the least used means of communication across the four countries that provided this particular data.

##### 3.4.1.2 Marketing Strategies of Culture and Creative Industries in EAC

Table 12: Marketing strategies employed by the institutions in Partner States

	Distribution of Marketing Strategies employed by Partner States				
	Kenya	Uganda	Tanzania	Rwanda	Burundi
Internet adverts	21.6	27.1	32.1	30.0	32.5
Radio adverts	17.4	33.3	29.1	9.8	28.6
Community groups	11.4	20.7	27.1	14.6	9.1
Word of mouth	10.0	77.9	45.5	1.1	24.0
Billboards/posters	9.8	26.9	30.9	3.0	1.9
TV adverts	9.8	9.5	19.3	2.8	2.6
Paper/Magazines pullout	7.8	22.3	14.7	6.0	0.6
Sponsoring events	7.8	7.76	10.5	13.0	-
Others	4.5	29.8	4.9	15.4	0.6

Source: Partner States' National Status reports 2013/14

Table 12 summarizes the picture in this area. Results above indicate that Cultural and Creative Industries institutions utilized Internet advertisement most in marketing their business and services followed by use of radio adverts, word of mouth, billboards, posters and magazines. The least used marketing strategy by institutions was sponsoring events.

Table 12 above also gives insights into country variations in CCII advertising strategies. CCII in Kenya mainly use the Internet to market their services and goods accounting for a share of 21.6% of their advertising costs/ time. On the other hand, Uganda-based institutions rely mostly on marketing by word of mouth which accounts for 77.9%. Tanzania based institutions, too, rely heaviest on marketing

by word of mouth accounting for 45.5%. In Rwanda, Internet Adverts are most used for marketing services and goods accounting for 30%. Burundi based institutions also rely heaviest on Internet adverts for their marketing accounting for 32.5%. With exception of Kenya and Rwanda where the use of Internet especially website for promotion of services and products is the main strategy, the use of the word of mouth is dominant in Uganda, Tanzania and Burundi.

Sponsoring of events is still less utilized as a marketing strategy across all the partner states. Use of posters and billboards is common mainly in Kenya, Tanzania and Uganda; radio adverts are very common in Uganda, Tanzania and Burundi while community groups are most commonly used for marketing products and services in Uganda and Tanzania. TV adverts are very common in Tanzania and use of magazines and pull outs is most common in Uganda.

### 3.4.1.3 Market Coverage for Trade in Creative Goods and Services

This study also analyzed markets served by creative enterprises across the region considering sales of culture and creative goods and services. This was done at the level of institutions as well as individuals as summarized in table 13 and 14 below.

Table 13: Market Coverage – Institutions (%)

Market Coverage	Kenya	Uganda	Tanzania	Rwanda	Burundi
Local	30.8	83.7	-	-	27.1
National	16.4	37.1	-	-	43.5
Regional	6.2	15.7	-	-	7.6
International	21.5	9.3	-	-	21.8
Not stated	25.1	-	-	-	00
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	-	-	<b>100.0</b>

Source: Partner States' National Status reports 2013/14. Rwanda and Tanzania data was not available

As seen in Table 13 above, most institution focus on the local market for the goods and services produced and this is significantly high in Uganda with coverage of 83.7% compared to Kenya at 30.8% and Burundi at 27.1%. This implies that the local market is the key market for this industry in the region.

Further, Uganda's CCI relies on the National market as its second in rank at 37.1% while Burundi has this as its number one market at 43.5%. On the other hand, Kenya's second priority is the International market covering 21.5%. This means that export of culture and creative goods and services is taking place more in Kenya than in either Uganda or Burundi. This means that overall, the Local, National and International markets are very strategically important for this industry in the EAC. Intra EAC trade is still low for this industry as shown by the coverage of 6.2% in Kenya, 15.7% in Uganda and 7.6% in Burundi.

In Table 14 below, the report presents market coverage by individuals in culture and creative industries and the evidence shows a similar trend as in institutions already discussed above.

Table 14: Market Coverage at Individual Level(%)

Market Coverage	Kenya	Uganda	Tanzania	Rwanda	Burundi
Local	27.0	82.2	38.8	00	40.0
National	29.6	51.7	33.5	00	33.0
Regional	6.1	19.5	7.1	00	14.8
International	37.4	31.4	20.6	00	12.2
Not stated	-	-	-	00	-
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: Partner States' National Status reports 2013/14, Rwanda data not available

Individual players in CCIs enjoy a high local market coverage in Uganda at 82.2% compared to 40% in Burundi, 38.8% in Tanzania and 27% in Kenya. National market coverage is still higher in Uganda at 51.7%, followed by Tanzania 33.5%, Burundi 33% and Kenya with the least coverage of 29.6%. Kenya still presents the highest coverage of International market at 37.4% compared to Uganda's 31.4%, Tanzania's 20.6% and Burundi's 12.2%. Kenya and Uganda are active players in targeting exports by individuals compared to other countries in the region.



### 3.4.2 Employment in Culture and Creative Industries

#### 3.4.2.1 Means of Acquisition of skills and knowledge

This study also analysed and compared how CCI operators in Partner States acquired skills. The means of skills acquisition that were compared include self-training, apprenticeship, traditional culture and others. Table 15 below summarises the findings in this area.

Table 15: Acquisition of Skills and Knowledge by CII Operators (%)

Country	Kenya	Uganda	Tanzania	Rwanda	Burundi
Self-Training	31.3	58.2	74	-	63.7
Apprenticeship	26.1	29.1	18	-	14.3
Traditional Culture	0.9	7.3	05	-	18.7
Others	41.7	5.5	03	-	3.3
	100.0	100.0	100	-	100.0

Source National Status Reports 2013/14. Data for Rwanda not available

As observed in the table above, majority of operators acquire skills through self-training as indicated by Kenya, Uganda, Tanzania and Burundi where data was available in National Status Reports.

Uganda put this source of skills and knowledge at 58.2% while Burundi put it at 63.7%, Tanzania at 74% and Kenya at 31.3%. In addition, there is a sizeable number that acquire skills through apprenticeship and also traditional culture as well. This shows that skills development in CCIs is not yet adequately formalized and institutionalised in EAC countries.

#### 3.4.3.1 Sector Economic contribution among Partner States

**Kenya:** According to the Kenya Copyright Board (KECOBO, 2009), items that form the industry include but are not limited to: Literary works (poems, novels, reference works), Artistic works (paintings, photographs etc.), and Performances (songs, dance, concerts etc.). According to Siwek (2004), the contribution of the industry to the GDP of nations in the world cannot be underestimated. According to the Central Bank Report (2008), radio stations attract 40% of all advertising receipts, followed by print media at 34%, and TV at 25%. The Central Bank Report (2008) further estimates that in 2003 the advertising receipts income was in the tune of Ksh 6.741 Billion. Broadcasting Industry continues to be dominant in culture and creative Industries in Kenya.

The Financial report of Kenya Film Commission (2011) observed that the direct contribution to the Kenyan economy by this industry stood at Kshs.1, 925.3 Million (0.093%) while the indirect contribution was Kshs.53, 143.6 Million (2.56%). The induced contributions from partial industries were Kshs.16, 718 Million (0.0804%). The motion pictures and related industries have been recording moderate growth with earnings by the industry increasing from Kshs.281 Million in 2004 to Kshs.357.6 Million in 2009. In 2009, the industry employed 4,103 people which increased by 25% from 2005. Between 2005 and 2009, the total wage earnings in the industry increased by 40%.

**Uganda:** Existing studies indicate that culture and creative industries are thriving in Uganda. For instance, over 250,000 people are employed in these industries with the book and press domain accounting for the highest percentage of employment at 34% compared to other domains (UNATCOM: 2009). In terms of tax revenue, creative goods and services contributed Uganda Shs.12.6 Billion (US\$6.7 Million) between 2006 -2009, and in import duty alone, the industry contributed Uganda shillings 8.6 Billion (US\$ 4.5 million).

The Study indicates that culture and creative industries in Uganda have not yet achieved their potential. For instance, 59% of the institutions in the Uganda National Status Report had gross incomes not exceeding US\$ 5000 and only six percent of institutions had gross revenues/incomes in excess of US\$ 500,000. Furthermore, most of the enterprises (57%) had been in existence for less than a decade. The industry is dogged by inadequate skills and knowledge and limited funding that lead to unprofessionalism and poor coordination. In addition, the protection of intellectual property, which is very critical for the growth of these industries, is also inadequate.

**Tanzania:** Tanzania's copyright industries contribute considerably to the national economy, as is shown by value added, employment, and employee incomes. The total value added of copyright-based industries in 2007-2010 ranged from TZS 391.635 billion to TZS 680.990 billion, which represented 3.0 to 4.6% of the total GDP of Tanzania, with the year 2009 recording the highest contribution.

In terms of income for employees, the copyright-based industries made a total of TZS 38.930 billion in 2007 and TZS 83.686 billion in 2009. This equates to a proportion of the total national economic value of 2.4% in 2007 and 5.0% in 2009. Copyright-based industries employed between 28,202 and 44,331 people over the period 2007 to 2010, which depicts a steady increase. This made up between 4.5% and 5.7% of the total national workforce (government and private sector employees) over this period.

In terms of employee compensation, the copyright industries combined contributed a total of TZS 80.474 billion, or a proportion of 5.0% of the national economic value of TZS 1.609 trillion. With respect to individual copyright industries, interdependent copyright industries contributed the most, at about TZS 48.294 billion (3%), followed by core copyright industries which contributed about TZS 28.272 billion (1.8%).

**Burundi:** The Cultural and Creative Industries in Burundi are still in their infancy stage. Until now, a very limited space has been reserved to culture in the Burundian policies and national development strategies. The national culture budget has always hovered around 1%.

Indeed, according to the Burundi National Report on Mapping of Cultural and Creative Industries, domestic and foreign sales were estimated at between 0 and \$ 5,000 for more than half (53.1%) of the cultural industries in the year 2012. Very few institutional cultural industries received over USD 5000 of revenue that year. The national report observed almost the same trend at the individual actors' level. More than 94% of the individual owned cultural industries made sales lower or equal to USD 5,000 in 2012.

At the institutional actor level, sales and performance account for 35% of the funding to these actors followed by private fund raising at 28%, government subsidies at 27.5%, sponsorships at 8.1% and Development Partners at 1.3%. The table shows that 88% of funding for individual actors in the industry comes from sales and performances of cultural industries. It is also worth noting that in general, the cultural industries in Burundi are not yet creating enough jobs in terms of staffing used.

### 3.4.3.2 Revenue Generation and size of enterprises

In this section the report categorizes culture and creative industries by Gross revenue categories.

Table 16: Distribution (%) of institutions/Individuals by Gross revenue/income

Gross Revenue Category (USD)	Kenya	Uganda	Tanzania	Rwanda	Burundi
0 - 5000	59.9	58.5	76.4	-	65.8
5001 - 10,000	12.3	10.4	11.9	-	5.3
10,001 - 50,000	13.9	12.8	6.4	-	13.2
50,001 - 100,000	5.9	8.3	2.3	-	5.3
100,001 - 500,000	4.1	4.3	2.5	-	5.3
Above 500,000	2.1	5.6	0.6	-	5.3
Not stated	1.8	-	-	-	-
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>00.0</b>	<b>100.0</b>

Source: National Status Reports; Data for Rwanda not available.

Evidence gathered in Table 16 shows that across all EAC countries, the majority of institutions and individual players are in lowest category of between 0-5000 USD annual gross revenue. For instance Tanzania had 76.4% in that category as the highest, followed by Kenya at 59.9%, Uganda at 58.5% and Burundi at 56.6%. This implies that overall in EAC region, more than half of the operatives are in the lowest income bracket. This means majority of the operatives are micro, small and medium enterprises who employ few workers often 1-5 employees and earn less income a year. This means that policies and programmes to support the culture and creative industries in EAC should pay much attention to SMEs operating in the sector. Those in the revenue category of beyond USD 500,000 are mainly large corporations either owned by Government or big private sectors such electronic and print media, and publishing.



### 3.5 Socioeconomic Data of Regional Creative Businesses

#### 3.5.1 Distribution of Culture and Creative Industries in Partner States

Data from the National Status Reports Partner States reveals that Culture and Creative Industries in East Africa are largely managed as small and medium size enterprises (SMEs) with few cases categorized as large enterprises. Most of these enterprises are concentrated in mainly centralized urban centers. For example, 35.9% of CCI in Kenya are located in Nairobi region, 47.1% of CCI in Uganda are located in Kampala for Uganda, 62% of CCI in Burundi are located in Bujumbura Mayorship region and 44% of CCI in Tanzania are located in Kinondoni (covering Dar-es-salaam, Zanzibar and Lake Region in Tanzania mainland) while 38% of CCI in Rwanda are located in Kigali, the capital city.

It should also be noted that majority of these CCI are informal. The formal enterprises are those registered as companies owned either privately or by governments. Formal enterprises which are registered comprise largely of the private sector companies with few of these enterprises registered belonging to Governments. For instance in Kenya 13.6% of CCI are registered as private companies, 60.2% of CCI are registered as private companies in Uganda, 31.2% of CCI are registered as private companies in Tanzania and 46% of CCI are registered as private companies in Burundi.

Companies earning above USD 500,000 threshold are few representing 2.1% of CCI in Kenya, 5.6% in Uganda, 6% in Tanzania and 5.3% in Burundi. Most enterprises are small and medium size with few large companies in Audio visual media and press and books domain.

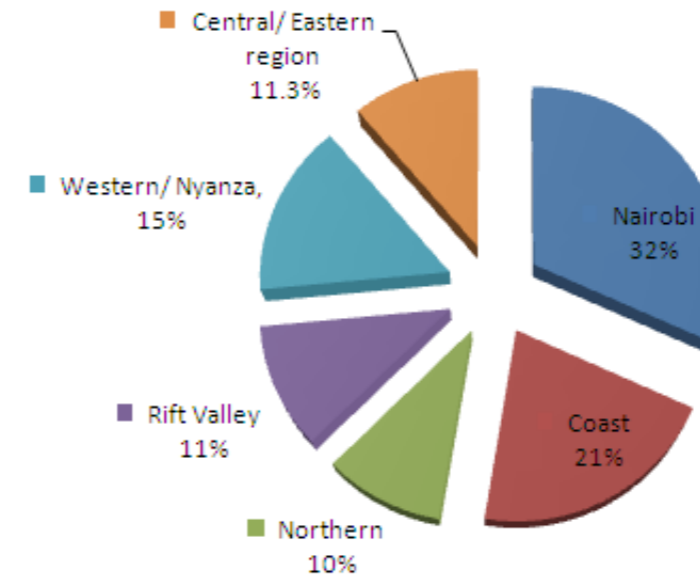
In the section below the report provides a detailed illustration of the distribution of industries within individual Partner States.

Table 17: Distribution of Culture and Creative Industries by Region in Uganda

UGANDA	
Region	Proportion of CCI
Kampala	47%
Central Region	26%
Northern region	7%
Eastern Region	12%
Western Region	8%

As observed earlier, the majority (47%) of culture and creative industries in Uganda are in the capital Kampala. Presence of CCI in Uganda is least at 7% in Northern Uganda.

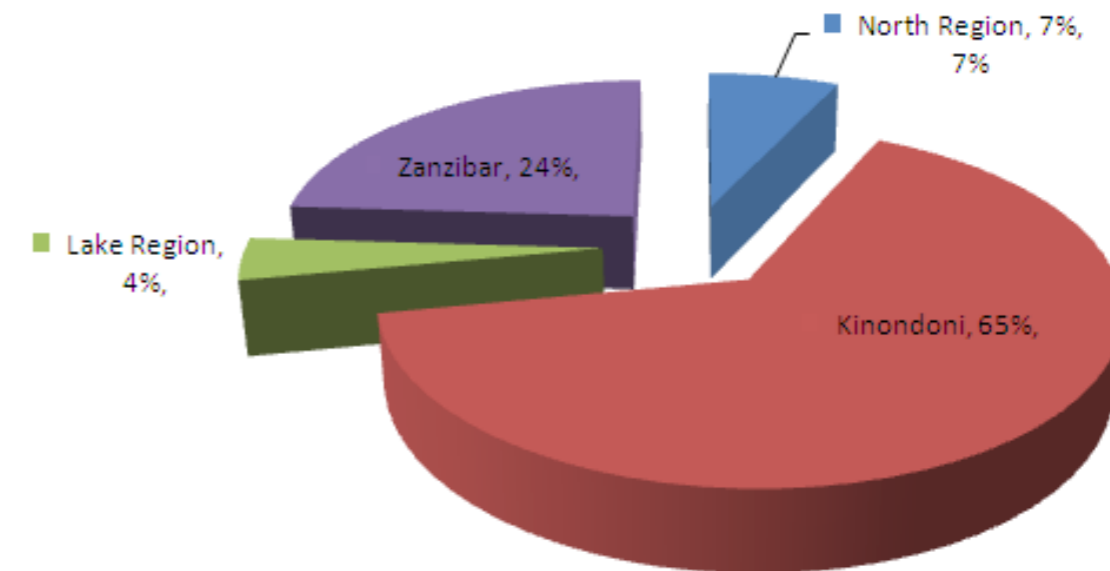
Figure 1: Distribution of CCI by Region in Kenya



Source: National Status Report, 2014

Figure 1 above shows that in Kenya, 31.9% of CCI are located in Nairobi the capital of Kenya and only 10% are located in rural areas of Northern Kenya.

Figure 2: Distribution of CCI by Region in Tanzania



Source: National Status Report, 2014

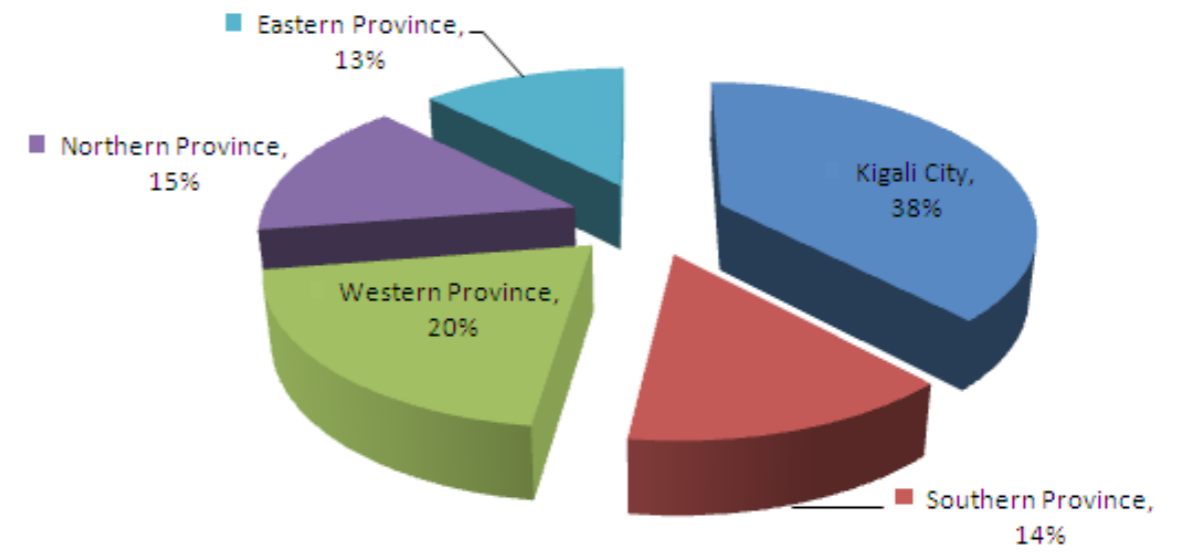
According to figure 2 above, in Tanzania, 65% of the sampled and interviewed respondents were located in Kinondoni district which covers the capital Dar-es-salaam while the least CCI presence at 4% was registered in the Lake region. Considering that sampling was in direct positive correlation to



Drums play an important role in every aspect of African life, including the physical, emotional and spiritual. African hand drums are played to communicate, celebrate, mourn and inspire. They're played in times of peace and war, planting and harvesting, birth and death.

the concentration of Creative and Cultural activities in regions, it goes without saying that the majority of Creative and Cultural Institutions are located in Kinondoni district which is urban. The national report of Tanzania however is silent on the exact number of these institutions in each region.

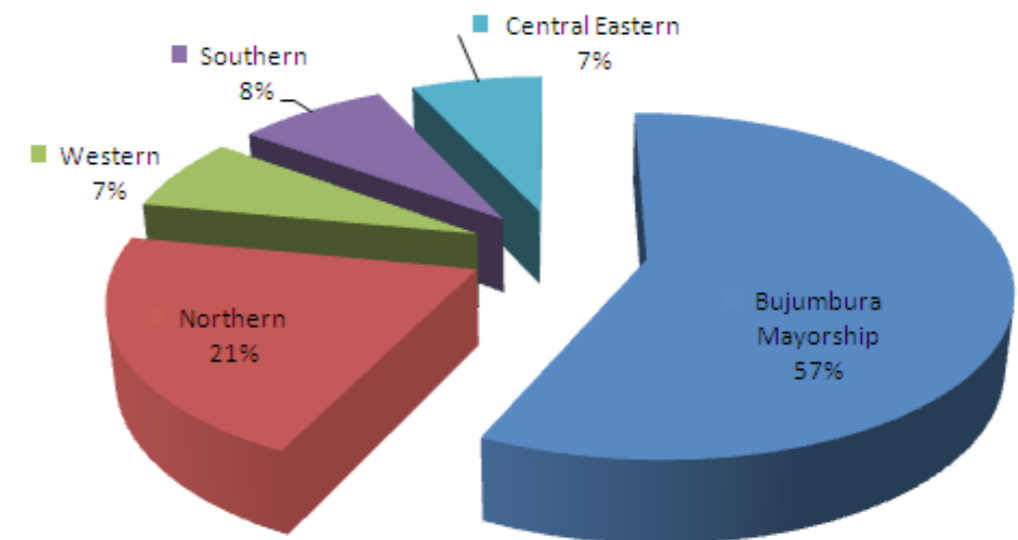
Figure 3: Distribution of CIs by Region in Rwanda



Source: Rwanda Database

As shown in Figure 3 above, the majority of CCI in Rwanda (at 38%) are located in the city of Kigali while the least presence of CCI was registered in Eastern Province of Rwanda.

Figure 4: Distribution of CCI by Region in Burundi



Source: Burundi National Status Report, 2014



As shown in Figure 4 above, the majority of CCIs in Burundi (at 57%) are located in the city of Bujumbura while the least presence of CCIs was registered in Western and Central Eastern regions of Burundi at 7% each.

A further look at the distribution discussed above reveals that in all the member states - Kenya, Uganda, Tanzania, Rwanda and Burundi - the majority of Culture and Creative Industries are concentrated in their capital cities. In Tanzania, 44% are located Dar-es-salaam (Kinondoni District); in Rwanda, 38% are concentrated in Kigali City; in Burundi, 57% are concentrated in Bujumbura Capital; in Kenya, 32% are located in Nairobi City while in Uganda, Kampala takes the lion's share of CCIs at 47%.

This scenario highlights the fact that CCIs thrive better in urban environments where supportive social and physical infrastructure like clean water, electricity, performing facilities like halls, market access, training institutions, financial institutions etc are found.

### 3.5.2 Source of Finance by Culture and Creative Industries

One of the challenges that industry players in EAC face is the lack of adequate finance to support the growth and development of Culture and Creative Industries. This study investigated sources of funding for the CCIs in the region. Table 15 below summarises the results of this investigation.

Table 18: Sources of Finance by Operatives

Source of Funding	Distribution(%) of Source of Funding among Partner States				
	Kenya	Uganda	Tanzania	Rwanda	Burundi
Government Subvention	4.5	3.3	00	1.4	27.5
Private Funding	13.1	22.7	00	73.6	28.1
Sales/Performances	53.4	87.2	00	3.1	35.0
Sponsorships	6.8	7.4	00	11.5	8.1
Development Partners	5.7	4.0	00	3.6	1.3
Others	16.5	23.1	00	6.8	00

Source: Partner States National Status Report 2013/14. Data for Tanzania was not available.

From the data in Table 18 above, it is clear that with the exception of Burundi, there is very little subvention support from Governments. Financing from sales and performance stood at 87.2% in Uganda compared to 53.4% in Kenya, 35.0% in Burundi. While in Rwanda financing is mainly through private funding accounting for 73.6%. Across EAC Partner States Government support through subvention is as low as 4.5% in Kenya, 3.3% in Uganda 1.4% in Rwanda and only high in Burundi at exceptional 27.5%. There is also an active though minimal role of the Development Partners in supporting culture and creative Industries in EAC standing at 5.7% in Kenya, 4.0% in Uganda, 3.6% in Rwanda and an abysmal 1.3% in Burundi.

### 3.5.3 Collection and use of Culture Statistics

This study compiled information regarding companies or individual players that collect and use culture statistics. This section provides the detailed findings of this investigation with Table 19 providing a comparison across EAC Partner States.

Table 19: Proportion of institutions in cultural and creative industries collecting information on cultural and creative industries by Domain

Country	Domain								
	Cultural and Natural Heritage	Books and Press	Performing Arts and Celebration	Visual Arts and Craft	Audio-visual and Inter-active media	Design and Creative Services	Culture and Tourism	Intangible Cultural Heritage	Sports and Recreation
Kenya	-	-	-	-	-	-	-	-	-
Uganda	0.4	19.7	0.3	15.3	41.9	13.1	1.4	1.4	6.5
Tanzania	0.6	2.9	65.2	8.2	11.9	10.2	0.6	0.2	00
Rwanda	-	-	-	-	-	-	-	-	-
Burundi	1.8	38.2	34.5	-	21.8	1.8	-	1.8	-
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: National Status Reports 2013/14. Information not available for Kenya and Rwanda

From Table 19 above, only three countries provided data for this category. In Uganda, cultural and creative enterprises that collect and utilise statistics on the sector fall mainly in the Audio Visual and Interactive Media domain at 41.9%. In Burundi statistics are most collected in Books and Press domain at 38.2% while in Tanzania majority of CCIs that collect and use culture statistics belong to Performing Arts and Celebrations at 65.2%.

On the other hand, domains where few CCIs collect data include Culture and Natural Heritage in the case of Uganda; Visual Arts and Crafts in the case of Burundi; and for Tanzania it is in the domains of culture and natural heritage as well as culture and tourism, intangible cultural heritage, sports and recreation. In general, collection and utilization of statistics among CCIs across the EAC region is very poor. That said, it is worth noting here that there is very scanty statistics being collected and used particularly in the domains of culture and natural heritage, culture and tourism, intangible cultural heritage as well as sports and recreation.

### 3.6 Critical Issues and Challenges of CCIs by Sector

#### 3.6.1 Challenges of the Cultural and Creative Industries in EAC

##### (i) Crisis of documentation

Information available on Creative and Cultural Industries (CCIs) is very scattered and not in any outstanding format. A lot of information on CCIs is documented in varied formats with different institutions within the public and private sectors, sometimes in unpublished documents, individual studies and papers which at times are not easy to access. The governments are trying to take steps towards sensitizing society and growing the CCIs through dedicated strategies such as the Arts and Crafts Strategy in Uganda and Rwanda.

The 2009 UNESCO Framework of Cultural Statistics (FCS) shows that the existing administrative data and sample surveys (individual, business and household) can be used to produce a wide range of cultural data that can help to measure the contribution of culture to the national economy in terms of Gross Domestic Product (GDP) and of trends in both cultural employment and cultural consumption (UIS, 2009). EAC Partner states need to adopt and use this framework or domesticate it. Economic data on cultural production and employment is produced currently by most national statistical offices by re-aggregating common economic statistics from existing economic surveys using the standard international statistical classifications<sup>1</sup>.

<sup>1</sup> Data is collected and utilized based on WTO Trade nomenclatures

##### (ii) Funding

In majority of countries, cultural and creative industries are heavily dependent on public funds and incentives, mainly because traditionally they have been seen predominantly from a cultural rather than a commercial point of view. But in EAC's case, public sector funding is so low ranging between 1.3% to about 4.5% (National Status Reports 2013/14). There is need for Governments to nurture these CCIs through budget support annually. The creative industry is a multi-billion-dollar business, and it should be seen not only from a cultural perspective but also as a profitable economic activity responsible for creating jobs and generating local revenue and export earnings. The creative economy fulfils a dual role as a tool for socio-economic growth on the one hand, and for cultural and human well-being on the other.

Many small and micro creative enterprises do not have access to credit facilities from commercial banks or other financial institutions. Investment is low in the sector which would make their business viable and from which artists and creators would be able to make a living exclusively from their creative or artistic works.

Governments in the region need to create incentives that attract investment in CCIs, particularly in audiovisual-related areas, which require greater investment in equipment and technology.

In recognition of these issues, this study delved into the challenges of the Industry in EAC by looking at the number of times a challenge was mentioned respondents interviewed during the survey. Challenges identified include financial, human resources, piracy, limited market and lack of equipment.

Table 20: Percent Distribution of Challenges Facing Culture Industries

	Key challenges and frequency in the selected Partner states				
	Financial constraints	Human Resource constraints	Piracy	Limited market	Lack of Equipment
Kenya	26.0%	12.1%	7.1%	11.9%	14.1%
Uganda	78%	19%	9.0%	43%	39%
Tanzania	23.6%	7.3%	9.4%	16.4%	18.4%
Rwanda	-	-	-	-	-
Burundi	87.4%	3.3%	00	6.0%	2.6%

Source: National Status Report 2013/14, Data for Rwanda not available.

Table 20 above indicates that most of the institutions in the Culture and Creative Economy in the EAC region face with financial constraints. This challenge featured in about a quarter of responses in Kenya (26%) and Tanzania (23%) while it was mentioned more than three quarters of respondents in Uganda (78%) and Burundi (87%). This implies that financing of Culture and Creative industries as a constraint is affecting all countries, it is most pronounced in Uganda and Burundi. Study findings showed that a good majority of Cultural practitioners and Institutions do not have enough assets to satisfy the collateral requirements of the banks. Banks and other financial institutions do not lend at levels that meet the demands of the commercial sector. Lending in the region is also constrained by high operating costs and risks. Because of this scenario, creative industries have no sponsors; most practitioners in this industry are self-sponsored.

##### (iii) Limited Markets

The third ranked challenge is limited market accounting for 43% in the case of Uganda's culture and creative industries, 16.4% in Tanzania, 11.9% in Kenya and 6.0% in Burundi. Market challenges were more pronounced in Uganda and least pronounced in Burundi.

##### (iv) Equipment

The fourth ranked challenge is lack of equipment standing highest at 39% in Uganda, 18.4% in Tanzania, 14.1% in Kenya and least pronounced in Burundi at 2.6%. The EAC will need to address issues of financing, human resource, markets and also piracy within the industry in collaboration with Partner States.

Human resources are a major limitation to the industry. There is a shortage of qualified man-power in key areas. Lack of technical training among media and other practitioners was frequently mentioned as a barrier. This area also includes weak or poor human resource management practices in the sector in the region.

Piracy is the least ranked challenge in the table above. But this is by no means a simple matter. There is inadequate protection for intellectual property rights relating to culture. Whereas excellent legislation exists in most of the member states, enforcement is frequently weak. Mechanisms to counter cyber-piracy are not well developed. This makes the creative industries less profitable to those who invest their knowledge and capital to produce creative goods and services. There are also inadequate mechanisms for the protection of communal Intellectual Property Rights (IPR) and Access to and Benefit Sharing (ABS) arising from the sector.

In addition to the five challenges summarized into Table 20 above, Kenya also highlighted constraints associated with 'technical changes' and 'lack of publicity' and put them at 8.5% and 9.9% respectively. Uganda highlighted 'technological changes' and 'lack of culture statistics framework' as well as 'lack of expertise' at 26%, 10% and 22% respectively.

Table 21 below provides a very detailed outlay of challenges highlighted in national reports affecting culture and creative Industries among Partner States of EAC beyond the main ones discussed quantitatively above.

**Table 21: Additional Country Level Challenges Of Culture and Creative Industries by Country**

Kenya	Uganda
<ol style="list-style-type: none"> <li>1. Insecurity is a challenge that could contribute to the closure of many CCI organizations.</li> <li>2. Underdeveloped cultural infrastructure: - The cultural and creative industries are characterized by inadequate and poorly integrated infrastructure for the growth of the industry.</li> <li>3. Lack of statistical data on the actual performance of the cultural and creative industries has hampered recognition of the sector as an important contributor to national development.</li> </ol>	<ol style="list-style-type: none"> <li>1. Limited capacity of stakeholders in terms of skills, knowledge and marketing among others,</li> <li>2. Absence of infrastructure for capacity building and limited financial support</li> <li>3. The quality and quantity of the products and services and their regional and international marketability and competitiveness.</li> <li>4. Many challenges still confront the sector from the supply side.</li> </ol>
Rwanda	Tanzania
<p>Most problems highlighted in Rwanda are related to the media and broadcasting sector which are:</p> <ol style="list-style-type: none"> <li>1. Lack of investment in local content production is a crucial barrier to the production of local content for consumption through the media.</li> <li>2. The small and uncompetitive broadcast media market, low levels and standards of professionalism</li> <li>3. Public and private sector investment in local content production is a major factor hindering the development of the industry</li> </ol>	<ol style="list-style-type: none"> <li>1. Inadequate infrastructural facilities, like power, transportation, telecommunication, all these hinder development of creative and cultural industries in Tanzania</li> <li>2. Lack of equipment and processing facilities. Even when the shooting of a film is done in Tanzania, the processing is done outside the country</li> <li>3. Poor security: Most of the works in the culture and creative industry have no security this made it impossible to control piracy.</li> <li>4. Working Space: some culture practitioners have no space for doing their activities, while some of them do not have enough space.</li> <li>5. Lack of Raw materials: this became a big challenge especially to sculptors as the Government does not allow forest harvesting (cutting of trees).</li> </ol>
Burundi	
<ol style="list-style-type: none"> <li>1. The absence of a cultural industry and the lack of qualified professionals (choreographers, film makers, museum curators, musicologists, archivists) able to exploit profitable opportunities.</li> <li>2. Weaknesses of the institutional and legal framework for the protection of intellectual property are also an obstacle to the development of the creative spirit of Burundian artists.</li> <li>3. Inadequate infrastructural facilities like power, transportation, telecommunication, all these hinder development of Creative and cultural industries in Burundi</li> </ol>	

<sup>1</sup> Figures in this column were estimated from a bar chart that appears in the Tanzania National Survey of CIs report

# CHAPTER 4: COMPARATIVE ANALYSIS OF CULTURE AND CREATIVE INDUSTRIES BY DOMAIN



## 4.1 Introduction

This chapter presents a comparison of the situation of CCI in each of the domains across EAC partner states/countries. It tries to unpack each domain and give detailed information on key players i.e. institutions, enterprises and individuals; economic activities; contribution to employment; and contribution to gross revenue.

## 4.2 Domains

As indicated in earlier chapters, domains that were unpacked below are derived from the UNESCO model and these include Books and Press, Performing Arts and Celebrations, Visual Arts and Crafts, Audiovisual and Interactive Media, Cultural and Natural Heritage, Design and Creative Services, Cultural Tourism, Sports and Recreation, and Intangible Cultural Heritage.

It is instructive to note that in several domains, not much information was available on a number of domain unpacking criteria used largely because study teams at country level conducted these studies following different methodologies and to some extent different terms of reference. As a result, while all countries gave detailed analysis of national level aggregated data, some country level reports missed giving detailed information for domain level analysis. This made it difficult to undertake regional level country comparisons in some areas. It is advisable that in future, both country level and regional level information requirements are harmonized before terms of reference for both country and regional level studies/ reporting are compiled. This will make comparability of results across countries (Partner States) and compilation of the regional report much easier.

**Tables 22 to 28 below give the detailed results of this comparison.**

## 4.2.1 Books and Press

Table 22: Unpacking Culture and Creative Industries in the Books and Press Domain

Kenya
<p><b>Key players</b></p> <ul style="list-style-type: none"> <li>There are both public and private institutions in this domain with private practitioners playing a leading role in the industry</li> <li>Key players include: The Kenya National Library Service (KNLS)<sup>1</sup>, Nation Media Group, the Standard Group, Kenya Publishers Association and the National Book Development Council</li> </ul> <p><b>Economic activities</b></p> <ul style="list-style-type: none"> <li>The KNLS issues the International Serial Book Number (ISBN) for books published in Kenya and also requires all publishers to deposit a copy of each publication made in the country</li> <li>Production of newspapers and magazines that is mostly done by private companies</li> </ul> <p><b>Contribution to employment</b></p> <p>90 per cent of people employed in the domain are employed in the library and archives while 10 per cent are employed in books and publishing</p> <p><b>General</b></p> <p>In Kenya, this field is well established as evidenced by the huge investment in the industry which is attributable to developed education and vibrant media sectors.</p>
Tanzania
<p><b>Key Players</b></p> <p>Book Development Council of Tanzania (BAMVITA), Booksellers' Association of Tanzania (BSAT), Centre for Energy, environment, Science and Technology (CEET), East African Book Development Association, Publishers' Association of Tanzania (PA TA), and the Writers' Association of Tanzania (UWAVITA), Tanzania Library Services Board (TLSB), Dar es salaam's University Press</p> <p><b>Economic Activities</b></p> <p>The main economic activities in this domain are; book printing and publishing, newspapers, magazine and digital content production</p> <p><b>Contribution to employment</b></p> <p>Data available in Country report is not disaggregated to domain level</p> <p><b>Contribution to gross revenue</b></p> <p>Data available in Country report is not disaggregated to domain level</p> <p><b>Marketing strategies</b></p> <p>Data available in Country report is not disaggregated to domain level</p>

Uganda
<p><b>Key players</b></p> <ul style="list-style-type: none"> <li>The Institutions in this domain are both public and private.</li> <li>The public institutions in this domain include; the Uganda Printing and Publishing Corporation, the New Vision Printing and Publishing Corporation, the Uganda Media Council and the Uganda Media Association. The others are National Media Centre and the Ministry of Information and National Guidance which is the overall policy organ of Government.</li> <li>The private institutions include; British-based publishing houses such as Macmillan, Longman, Heinemann, Oxford University Press, Thomas Nelson, the Cambridge University Press and Evans, Reproduction Rights Organization and various indigenous privately owned printing and publishing companies.</li> <li>Newspapers include the New Vision Printing and Publishing Corporation, the Daily Monitor, the Red Pepper, the East African, Business Week and the Sunrise. In this domain, there are various magazines including; Business Today Magazine, The CEO, the Independent magazine, Bride and Groom and African Woman</li> </ul> <p><b>Economic activities</b></p> <p>The main economic activities in this domain are; book printing and publishing, newspapers, magazine and digital content production through CD ROM, DVD and the Internet; collecting royalties and also ensuring that the intellectual property rights of members are protected</p> <p><b>Contribution to employment</b></p> <p>The domain employs approximately 40,953 out of the total of 148,371 covered in the study which represents 8 percent.</p> <p><b>Contribution to gross revenue</b></p> <p>The Study revealed that while the domain had the highest percentage of institutions with gross revenues in excess of US\$ 500,000 (14.6%), the domain has a significant number of enterprises earning below \$5000 (45.5%).</p> <p><b>Marketing strategies</b></p> <p>The main channel and strategy for marketing under this domain is the word of mouth through sales and marketing teams which stands at over 85 percent followed by marketing through billboards 34 percent. There is also evolving technology driven marketing through the internet that accounts for 23 percent. Other strategies include radio and television marketing, sponsorship and community groups as shown below;</p>

## Burundi

### Key Players

- Since the beginning of 1999, 13 new publications have been certified by the Conseil National de la Communication
- Out of these, only the following are to be found more or less regularly on the market: the weekly La Vérité ; the fortnightly newspapers Umunywangi Infop and La Lumière; and an economic magazine, Great Lakes' Business News.
- Only the Catholic newspaper Ndongezi is published in Kirundi; all the others use French

### Economic Activities

The main economic activities in this domain are; book printing and publishing, newspapers, magazine and digital content production

### Contribution to employment

Data available in Country report is not disaggregated to domain level

### Contribution to gross revenue

In terms of total revenue from foreign and local sales of products and services by institutions in this domain in the previous financial year, 55.6% of the players earned between USD 0-5,000, 2.8% earned between USD 5,001-10,000, 11.1% earned between USD 10,001-50,000, 5.6% earned between USD 50,001-100,000, 19.4% earned between USD 100,001-500,000 and 5.6% earned beyond USD 500,000. In terms of total revenue from foreign and local sales of products and services by individuals in this domain in the previous financial year, 100% of the individual players earned between USD 0-5,000 and none earned beyond USD 5,000.



*Taarab is a music genre popular in Tanzania and Kenya. It is influenced by the musical traditions of the African Great Lakes, North Africa, the Middle East, and the Indian subcontinent. Taarab rose to prominence in 1928 with the advent of the genre's first star, Siti binti Saad.*

## 4.2.2 Performing Arts and Celebrations

Table 23: Unpacking Culture and Creative Industries in the Performing Arts and Celebrations Domain

## Kenya

### Key Players

- Both private and public institutions as well as individual artiste practitioners are variously well spread out within the country.
- Examples of private institutions under this domain include The Go Down Arts Centre and Sarakasi Trust in Nairobi, Little Theatre in Coast and Nakuru Players Theatre in Rift valley.
- The main public institutions associated with performing arts are; Kenya Cultural Centre /National Theatre and Bomas of Kenya.
- Varied private enterprises in this area exist as performance bands and groups plying their trade in music, dance, drama, acrobatics/circus, choral singing etc.

### Economic Activities

This domain covers performing arts, music, festivals, fairs and feasts. The main activities of the domain are; content origination, manufacture of music instruments, sound recording, music publishing, stage plays and performance production, public performance of music, dance and drama, festivals and touring.

### Contribution to employment

Data was not disaggregated to domain level

### Contribution to gross revenue

- The main source of revenue is in the entertainment activities at 91.1 per cent followed by manufacture of music instruments at 6.8 per cent and sound recording and music publishing activities at 2.1 per cent.
- In terms of total revenue from foreign and local sales of products and services by individuals in this domain in the financial year before this study was undertaken, 58.3% of the individual players earned between USD 0-5,000, 16.7% earned between USD 5,001-10,000, 20.8% earned between USD 10,001-50,000, 4.2% earned between USD 50,001-100,000 and 0% earned beyond 1000.

### Marketing strategies

Data was not disaggregated to domain level

## Uganda

### Key Players

- The key public institutions include; the Ministry of Gender, Labour and Social Development which is mandated with the culture promotion function in Government
- The Ministry of Tourism, Wild life and Antiquities which is responsible for built heritage and
- The Uganda National Cultural Centre which is also responsible for the promotion and preservation of culture.
- The local Governments are also mandated to promote culture in their jurisdictions.
- Other supportive public institutions include; the Uganda Bureau of Statistics, which is responsible for generating national culture statistics and the Uganda Investment Authority, which has started to attract investment into the creative economy.
- Another critical institution is the Uganda Performing Right Society (UPRS), which is a private collective management organization that collects and distributes royalties to musicians. The UPRS has a membership of about 1000 artistes

### Economic Activities

This domain covers performing arts, music, festivals, fairs and feasts. The main activities of the domain are; content origination, stage plays and performance production, public performance of music, dance and drama, festivals and touring. Most of these activities are enjoyed by the public at a cost.

### Contribution to employment

The sector contributes a meager 798 out of 148,371 employees in the sub-sector accounting for 0.5% of employment because most of the enterprises are unregistered (45%) and are operating informally.

### Contribution to gross revenue

The majority of enterprises in this domain earn less than US dollars 5000 (46.7%) annually with a few earning between US dollars 100,000- 200,000 (20.0%). 65 percent of these institutions source funding through sales and promotion of their services while Government subvention is about 25 percent and 35 percent comes through fundraising.

### Marketing strategies

Marketing under this domain is still largely by word of mouth (70%). Other strategies are radio (50%) and Bill Boards (45%).

## Tanzania

### Contribution to gross revenue

In terms of total revenue from foreign and local sales of products and services by institutions in this domain in the year 2014, 81.4% of the players earned between USD 0-5,000, 10.7% earned between USD 5,001-10,000, 6.9% earned between USD 10,001-50,000, 0.3% earned between USD 50,001-100,000, 0.6% earned between USD 100,001-500,000 and 0% earned beyond USD 500,000.

## Burundi

### Contribution to gross revenue

In terms of total revenue from foreign and local sales of products and services by institutions in this domain in the previous financial year, 71.2% of the players earned between USD 0-5,000, 5.8% earned between USD 5,001-10,000, 7.7% earned between USD 10,001-50,000, 5.8% earned between USD 50,001-100,000, 5.8% earned between USD 100,001-500,000 and 3.8% earned beyond USD 500,000. In terms of total revenue from foreign and local sales of products and services by individuals in this domain in the previous financial year, 97.7% of the individual players earned between USD 0-5,000, 2.3% earned between USD 5,001-10,000, 0% earned between USD 10,001-50,000, 0% earned between USD 50,001-100,000 and 0% earned beyond USD 100,000.

## Rwanda

### Key Players

Iby' Iwacu cultural village in Musanze, the National Museum of Rwanda, Intore Dance Troupes

### Economic Activities

This domain covers performing arts, music, festivals, fairs and feasts.

### Contribution to employment

Data available in Country report is not disaggregated to domain level

### Contribution to gross revenue

Data available in Country report is not disaggregated to domain level



Imagery on clothing or traditional attire worn in the region has different meanings. Chiefs, traditional healers, elderly men, women and children wear clothing with different symbols to show their status or positions in society as well as to signify the occasion. A distinctive feature of traditional African dress is its use of festive colours, intricate patterns, headgears and figurative symbols to communicate meaning.

### 4.2.3 Visual arts and Crafts

Table 24: Unpacking Culture and Creative Industries in the Visual arts and Crafts Domain

Kenya
<p><b>Key Players</b></p> <p>The study showed that a big proportion of 97.7 per cent was in the arts and crafts while photographic activities had a small proportion of 2.3 per cent. This may be due to the high penetration of international art markets by Kenyan fine artists.</p>
<p><b>Economic Activities</b></p> <ul style="list-style-type: none"> <li>• The study looked at the various aspects of the domain including photographic activities, creative arts and crafts, jewelry, ornaments and related articles, ceramics and wood carvings, hand textiles and woven products.</li> <li>• Crafts in Kenya include but are not limited to; home decoration articles, basketry products, bead works, pottery, body adornment accessories, household gifts and batiks.</li> </ul>
<p><b>Contribution to gross revenue</b></p> <ul style="list-style-type: none"> <li>• The analysis showed that 49.1 per cent of the revenue earned from fine arts was from paintings and sculpture and 47.7 per cent from crafts including jewelry, basketry, and ornaments and weaving.</li> <li>• In terms of total revenue from foreign and local sales of products and services by individuals in this domain in the 2013/2014 financial year, 65.6% of the individual players earned between USD 0-5,000, 18.8% earned between USD 5,001-10,000, 6.3% earned between USD 10,001-50,000, 3.1% earned between USD 50,001-100,000 and 0% earned beyond USD 100,000.</li> </ul>
Tanzania
<p><b>Key Players</b></p> <p>Data available in Country report is not disaggregated to domain level</p>
<p><b>Economic Activities</b></p> <ul style="list-style-type: none"> <li>• It is considered as a craft a mere hobby that just about anyone could learn.</li> <li>• elements of art skills are integrated in vocational skills subject</li> <li>• few gifted children with parents who appreciate art happen in a few circles and outside the school</li> <li>• Tanzania boasts of the famous visual artists George Lilang for his acclaimed Tanzanian art paintings, a visual art giant in his own right, at Nyumba ya Sanaa. His sculptures, reliefs and paintings have been the (un)conscious inspiration for many artists, home decoration / house ware and fashion accessories within which we have a huge variety of products.</li> <li>• Utensils made of wood, table mats and decoration items are the most traded home decoration handicrafts while the most traded fashion accessories are Kikoi, bags and purses, shawls, neck &amp; beachwear</li> </ul>
<p><b>Contribution to gross revenue</b></p> <p>In terms of total revenue from foreign and local sales of products and services by institutions in this domain in the 2013/2014 financial year, 87.2% of the players earned between USD 0-5,000, 5.1% earned between USD 5,001-10,000, 2.6% earned between USD 10,001-50,000, 2.6% earned between USD 50,001-100,000, 2.6% earned between USD 100,001-500,000 and 0% earned beyond USD 500,000.</p>



## Uganda

### Key Players

There are various institutions that support the domain. Some of them are public while others are private. The public institutions include; the Ministry of Gender, Labour and Social Development, the Ministry of Trade, Industry and Cooperatives, Uganda Investment Authority, Private Sector Foundation, Uganda Export Promotion Board and Private sector Foundation Uganda among others. The other nationally recognized institutions are; Uganda Small Scale Industries, National Arts and Crafts Association of Uganda (NACAU), Uganda Women Entrepreneurs Association. Some of these umbrella organizations double as enterprises.

- 37 percent of the enterprises are registered and operating in Kampala while
- 34 percent are in the central region. Eastern region accounts for 14 percent, western,
- 12 percent and northern accounts for a paltry 3 percent.
- The majority of the institutions are not registered (62.9%) with the registered accounting only for 37 percent.
- 18 percent of the operatives are females and 8 percent are male

### Economic Activities

The main activities under this sector comprise the production and marketing of visual arts and crafts products by enterprises. The main producers are women, youth and persons with disabilities selling mainly to tourists. There are a few commercial producers who export to markets in Europe and North America.

- Crafts in Uganda include but are not limited to; art and paintings, sculpture, home decoration articles, basketry products, bead works, pottery, accessories, florist vessels, household gifts, batiks, Jewelry, toys, music instruments and ornaments.
- Others are; ceramics and wood carvings, hand textiles and woven products.

### Contribution to gross revenue

In terms of total revenue from foreign and local sales of products and services by institutions in this domain in a financial year, 68.4% of the players earned between USD 0-5,000, 15.8% earned between USD 5,001-10,000, 8.8% earned between USD 10,001-50,000, 1.8% earned between USD 50,001-100,000, 5.3% earned between USD 100,001-500,000 and 0% earned beyond USD 500,000.



*In East Africa, many rural women shape their own prosperity by weaving sisal, raffia and doum palm baskets.*

## Rwanda

### Key Players

Excellent places to peruse and purchase modern art work in Kigali are CAPLAKI Craft Village, Ivuka Arts, Inganzo Gallery, African Gift Corner, Ishyo Cultural Centre, ATRAC Craft Village and Uburanga Art Studio

### Economic Activities

- A wide range of traditional handicrafts is produced in rural Rwanda, ranging from ceramics and basketry to traditional woodcarvings and contemporary paintings.
- Rwanda's traditional Agaseke baskets have become famous the world over and a visit to Gahaya Links Gifted Hands centre will allow any guest to witness the weaving of these baskets first hand and purchase the high quality baskets directly from the centre.
- A good selection of painted and handcrafted artefacts can be viewed in craft villages, shops and numerous art galleries in Kigali.
- Rwandan craft is the Imigongo or cow dung paintings that are produced by a local co-operative in the village of Nyakarambi near the Rusumo Falls border with Tanzania.
- Dominated by black, brown and white whorls and other geometric abstractions, these unique and earthy works can be bought in Kigali, but it's worth diverting to the source to see how the paintings are reflected in local house decorations.
- The Home Décor & Fashion industry in Rwanda currently includes the following products: embroidery and woven products, hand sown textiles and hand-loomed products, ceramics and pottery, wood products, jewellery and imigongo. Products that are newer to the market, and that have the potential to increase export revenues in the sector, include silk and leather products.

## Burundi

### Key Players

Data available in Country report is not disaggregated to domain level

### Economic Activities

Data available in Country report is not disaggregated to domain level

### Contribution to employment

Data available in Country report is not disaggregated to domain level

### Contribution to gross revenue

In terms of total revenue from foreign and local sales of products and services by institutions in this domain in the previous financial year, 0% of the players earned between USD 0-5,000; 16.7% earned between USD 5,001-10,000, 8.3% earned between USD 10,001-50,000; 8.3% earned between USD 50,001-100,000, 33.3% earned between USD 100,001-500,000 and 33.3% earned beyond USD 500,000.

In terms of total revenue from foreign and local sales of products and services by individuals in this domain in the previous financial year, 91.2% of the individual players earned between USD 0-5,000; 7% earned between USD 5,001-10,000, 1.8% earned between USD 10,001-50,000, 0% earned between USD 50,001-100,000 and 0% earned beyond USD 100,000.

Imigongo is an art form popular in Rwanda traditionally made by women using cow dung. Often in the colors black, white and red, popular themes include spiral and geometric designs that are painted on walls, pottery, and canvas



#### 4.2.4 Audiovisual and Interactive media

Table 25: Unpacking Culture and Creative Industries in the Audiovisual and Interactive Media Domain

Kenya
<p><b>Key Players</b></p> <ul style="list-style-type: none"> <li>• This sub-sector is well regulated by the Communication Authority of Kenya (CA) which is a state owned parastatal which is mandated to issue licenses and allocate signals to the various players in this sector.</li> <li>• The Kenya Film Classification Board (KFCB), the Department of Film Services (DFS) and the Kenya Film Commission (KFC) are the other main players</li> <li>• There are a number of other private companies and public institutions operating in the film and video sub-sector.</li> <li>• The sub-sector is dominated by private film producers who undertake both filming and video shooting of various activities.</li> <li>• There are over 100 radio stations in Kenya and their distribution is not homogenous in terms of numbers.</li> <li>• Some regions have more radio stations than others. In the survey conducted by Synovate (Deloitte &amp; Touche 2012), upper Eastern Kenya has the largest share of active radio stations at 13, with 5 as National stations and 8 regional stations.</li> <li>• South Nyanza, Central and North Eastern have the least number of stations with 8 active radio stations each.</li> <li>• According to the Central Bank Report (2008), radio stations attract 40% of all advertising receipts today, followed by print media at 34%, TV at 25%.</li> <li>• The study revealed that majority i.e. 64.4 per cent of the employees work in motion pictures and video production activities. This may be attributed to the increased use of technology in production.</li> </ul> <p><b>Economic Activities</b></p> <p>Audiovisual production and post-production, casting and crewing, equipment-hiring, set design and manufacturing, prop supplies and distribution businesses such as cinemas, TV broadcasting and mobile entertainment provision</p> <p><b>Contribution to employment</b></p> <p>Direct job creation happens in production and post-production companies, through casting and crewing agencies, in equipment-hiring companies, through set design and manufacturing companies, prop suppliers and in distribution businesses such as cinemas, TV broadcasters and mobile entertainment providers. Indirect job creation happens in supporting industries such as the hospitality industry, in catering firms and hotels, and the transport industry.</p> <p><b>Contribution to gross revenue</b></p> <p>In 2012, the addition to the GDP by the audiovisual industry was valued at KES 74 billion, which amounted to be about 2.25% of the GDP2.</p> <p><b>Marketing strategies</b></p> <p>Data available in Country report is not disaggregated to domain level</p>

## Uganda

### Key Players

- The domain is dominated by production companies for programming, broadcasting and transmission.
- Studies such as UNATCOM 2009 and Synovate of 2009 have indicated that Uganda has over 20 Television stations and about 220 Radio Broadcasting companies across the country
- The key regulating institution is the Uganda Communications Commission which is mandated to license television and radio broadcasting in the country.
- The Uganda Broadcasting Corporation provides digital signals for all radio and TV broadcasters.
- There is also the National Broadcasting Council, Uganda Federation of the Movie Industry which is the collective management organization in this area and the Uganda Investment Authority which provides investment incentives to enterprises that invest in the domain.
- In terms of broad casting, the state-owned Uganda Broadcasting Corporation (UBC) dominates the country's television broadcasting primarily because its signal covers about 90% of the country and operates at government subsidized rates compared to other stations.
- 42 percent of the enterprises are located in Kampala, 26 percent are in central region and 16 percent are in the eastern region.
- 12 percent are in the northern region. The west with 4 percent has the least number of enterprises in this domain.
- 52 percent of the institutions under this domain are registered.
- Of the registered institutions, 33 percent are in Kampala.
- The central has 22 percent, eastern has 24 percent. Northern has 14 percent and western has 6 percent.

### Economic Activities

The economic activities include; competitive broadcasting services with television and radio, advertising and entertainment. There is also a slow but visible growth of local Ugandan movies some of which have enjoyed continental success. Coupled with these are annual film festivals such as the "Amakula" and "Manya" film festivals

### Contribution to employment

Under this domain, people are employed in production, journalism, studio recording, broadcasting and lighting among others. It is estimated that freelancers make up almost 60 percent of the total labor force in these enterprises (UNATCOM 2009). 32,953 out of 148,371 constituting 22 percent covered under the study. Male employees dominate both professional and non-professional categories of employment under this domain.

### Contribution to gross revenue

In terms of total revenue from foreign and local sales of products and services by institutions in this domain in the financial year just before this study, 58.9% of the players earned between USD 0-5,000, 7.1% earned between USD 5,001-10,000, 15.2% earned between USD 10,001-50,000, 12.5% earned between USD 50,001-100,000, 2.7% earned between USD 100,001-500,000 and 3.6% earned beyond USD 500,000.

### Marketing strategies

In this domain, marketing and promotion strategies are through the word of mouth, followed by billboards, radio advertising and papers/magazines.

## Rwanda

### Key Players

- Today, the country has 32 privately owned newspapers and 18 radio stations operating side by side with the state-owned broadcasting and newspaper institutions as well as 4 international radio stations relaying to Rwanda in Frequency Modulation (FM).
- The national backbone fibre optic cable has been laid throughout the country connecting all of Rwanda's 30 districts and many public and private institutions to the Internet, thus creating a viable enabling environment.
- Radio is the most frequently used media every day (87%), followed by TV (76%) and newspapers (40%).
- This revelation explains why anyone who wishes to produce local content for consumption by the larger community of Rwanda should target Radio first and then TV.
- Relatively, newspapers are third in terms of current usage and trial, scoring 40% on both.

## Tanzania

### Key Players

- There are close to 47 FM radio stations, 537 registered newspapers, and a dozen television stations in Tanzania.
- However, the only radio transmission which is allowed countrywide is the state-controlled Radio Tanzania and Televisheni ya Taifa.
- Only 25 percent of the country receives broadcasts from private stations. Swahili is again strongly promoted but not at the expense of English

### Contribution to gross revenue

In terms of total revenue from foreign and local sales of products and services by institutions in this domain in the 2013/2014 financial year, 51.7% of the players earned between USD 0-5,000, 17.2% earned between USD 5,001-10,000, 8.6% earned between USD 10,001-50,000, 8.6% earned between USD 50,001-100,000, 10.3% earned between USD 100,001-500,000 and 3.4% earned beyond USD 500,000.

## Burundi

### Key Players

Data available in Country report is not disaggregated to domain level

### Economic Activities

Data available in Country report is not disaggregated to domain level

### Contribution to employment

Data available in Country report is not disaggregated to domain level

### Contribution to gross revenue

In terms of total revenue from foreign and local sales of products and services by institutions in this domain in the financial year immediately before the one this study was conducted in, 40% of the players earned between USD 0-5,000, 6.7% earned between USD 5,001-10,000, 26.7% earned between USD 10,001-50,000, 13.3% earned between USD 50,001-100,000, 10% earned between USD 100,001-500,000 and 3.3% earned beyond USD 500,000. No information was collected on total revenue from foreign and local sales of products and services by individuals in this domain

Cultural dances play a huge role in East Africa. These dance forms are used to teach moral values, social etiquette and to help people mature and celebrate members of the community while celebrating festivals and other occasions.



## 4.2.5 Culture and Natural heritage

Table 26: Unpacking Culture and Creative Industries in the Culture and Natural heritage Domain

Kenya	Uganda:
<p><b>Key Players</b></p> <ul style="list-style-type: none"> <li>● This domain includes museums, archeological and historical places, cultural landscapes and natural heritage.</li> <li>● In the Kenyan context, there are both private and public players in this field with the government taking an upper hand in the development and management of this heritage. Private organizations and individuals develop and manage private museums for their own economic gains.</li> <li>● The government established the National Museums of Kenya (NMK) to develop, manage, conserve and preserve all cultural and natural heritages for national identity and as tourism attraction sites.</li> <li>● These sites earn foreign exchange for the government. Examples of cultural and natural heritage include the Fort Jesus, Gede Ruins, Jumba la Mtwana Ruins, the Kaya spiritual sites, Lamu Fort, Takwa Ruins among others in the Coast region.</li> <li>● Others include Kakamega forests, Nairobi National Museum and other local museums, Dedan Kimathi and Tom Mboya statues.</li> </ul> <p><b>Contribution to employment</b></p> <p>Data available in Country report is not disaggregated to domain level</p> <p><b>Contribution to gross revenue</b></p> <p>In terms of total revenue from foreign and local sales of products and services by institutions in this domain in 2013/2014 financial year 0% of the players earned between USD 0-5,000, 100% earned between USD 5,001-10,000, 0% earned beyond USD 10,001.</p>	<p><b>Key Players</b></p> <ul style="list-style-type: none"> <li>● Uganda has an impressive historical stock of museum and heritage sites (Uganda Museums, 2009).</li> <li>● The Uganda Museum, which was founded in 1908, is the largest in the country.</li> <li>● There are about 15 small but living museums in the towns of Gulu, Moroto, Jinja, Butambala, Kampala, Hoima, Kibaale, Fort Portal, Kasese, Mbarara and Kabale (CCFU 2007).</li> <li>● Others include; the traditional palace in Kawere, African Museum in Wakiso, Kogere Museum in Fort Portal and Kabala museum.</li> <li>● The most active museums are in Tooro Kingdom located at the main Rukurato building (Traditional Parliament) and the traditional palace (the Kikari).</li> <li>● Also, there are cultural sites in Kasese. Other Museums are in Mbarara, Isingiro and Kabale towns.</li> </ul> <p><b>Economic Activities</b></p> <p>These include tourism, research, education, and learning services among others</p> <p><b>Contribution to employment</b></p> <p>Data available in Country report is not disaggregated to domain level</p> <p><b>Contribution to gross revenue</b></p> <p>In terms of total revenue from foreign and local sales of products and services by institutions in this domain in the 2013/2014 financial year, 52.9% of the players earned between USD 0-5,000, 5.9% earned between USD 5,001-10,000, 29.4% earned between USD 10,001-50,000, 5.9% earned between USD 50,001-100,000, 0% earned between USD 100,001-500,000 and 5.9% earned beyond USD 500,000.</p>

Tanzania	Rwanda
<p><b>Key Players</b></p> <ul style="list-style-type: none"> <li>● Ngorongoro Crater Conservation Area</li> <li>● Serengeti National Park Area</li> <li>● Key historical sites like Olduvai Gorge Antiquities and Nsongezi</li> <li>● Museums: National Museum of Dar-es Salaam, Village Museum in Dar es Salaam, the National History Museum and the Arusha Declaration Museum in Arusha, and the Mwalimu Julius K. Nyerere Memorial Museum in Butiama</li> <li>● There are also village museums like Kijiji cha Makumbusho, or Village Museum,</li> <li>● Archaeological or Paleontological sites such Olduvai Gorge, Laetoli Footprint, Isimila Stone Age site, Engaruka Ruins;</li> <li>● Historical sites such as Kaole Ruins, Kunduchi Ruins, Kilwa Kisiwani Ruins, Songo Mnara Ruins;</li> <li>● Historical towns such as Bagamoyo, Kilwa Kivinje, Mikindani; Traditional Settlements such as Kalenga in Iringa and Bweranyange in Kagera</li> <li>● Historic Buildings like Colonial Administrative Buildings (BOMAs) in many Districts in Tanzania</li> <li>● Sites with special memories like Colonialists Cemetery, Cemeteries of World War I and II and Defensive Walls</li> <li>● Natural Features and Structures such as Mbozi Meteorite, Amboni Caves and Kondoa Rock Art Shelters to name only a few</li> </ul> <p><b>Economic Activities</b></p> <p>Data available in Country report is not disaggregated to domain level</p> <p><b>Contribution to employment</b></p> <p>Data available in Country report is not disaggregated to domain level</p> <p><b>Contribution to gross revenue</b></p> <p>In terms of total revenue from foreign and local sales of products and services by institutions in this domain the 2014/2015 financial year, 66.7% of the players earned between USD 0-5,000, 0% earned between USD 5,001-10,000, 0% earned between USD 10,001-50,000, 33.3% earned between USD 50,001-100,000, 0% earned beyond USD 100,000.</p>	<p><b>Key Players</b></p> <ul style="list-style-type: none"> <li>● The Institute of National Museums of Rwanda (INMR)</li> <li>● <i>tubindi twa Rubona</i> is a cultural site located about 4 km from the main road Kayonza-Nyagatare; in Tubindi Village, Rubona Cell, Kiziguro Sector, Gatsibo District.</li> <li>● Rwanda has the National Arts Museum, The Museum of ancient history and the museum of Natural history and the royal residence of King Mutara III Rudahigwa</li> <li>● Other sites include Urutare rwa Ngarama in Ngarama,, Ryamurari and Mimuri sites in Nyagatare</li> </ul> <p><b>Burundi</b></p> <p><b>Contribution to gross revenue</b></p> <p>In terms of total revenue from foreign and local sales of products and services by institutions in this domain in the 2014/2015 financial year, 50% of the players earned between USD 0-5,000, 25% earned between USD 5,001-10,000, 12.5% earned between USD 10,001-50,000, 0% earned between USD 50,001-100,000, 0% earned between USD 100,001-500,000 and 12.5% earned beyond USD 500,000.</p>

The Maasai tribe is well known for its traditional handmade bead jewelry. Beadwork has been an important part of Maasai culture for many years. It is considered the duty of every Maasai women to learn the jewelry making craft.



## 4.2.6 Design and Creative Services

Table 27: Unpacking Culture and Creative Industries in the Design and Creative Services Domain

Kenya	Uganda
<p><b>Key Players</b></p> <ul style="list-style-type: none"> <li>There are some private enterprises that provide specialized training in design and fashion such as Evelyn School of Design</li> <li>African Heritage and Kaveke Designs. There are also various enterprises involved in graphic designs many of which are based in Nairobi</li> <li>In the area of advertising, the private sector has invested in firms such as Scanad, Ogilvy, and Saatchi and Saatchi</li> </ul> <p><b>Economic Activities</b></p> <p>Enterprises under this sub-sector are mainly involved in fashion design, art and design, graphic designs for the printing and publishing industry as well as broadcasting and entertainment</p> <p><b>Contribution to employment</b></p> <p>Professionals in this sector (66.7%) are more than the non-professionals (33.3%) which may be attributed to the specialty and skills required to undertake activities in this domain.</p> <p><b>Contribution to gross revenue</b></p> <p>In terms of total revenue from foreign and local sales of products and services by institutions in this domain in the financial year preceding this study was conducted in, 58.3% of the players earned between USD 0-5,000, 16.7% earned between USD 5,001-10,000, 25% earned between USD 10,001-50,000, 0% earned between USD 50,001-100,000, 0% earned between USD 100,001-500,000 and 0% earned beyond USD 500,000.</p> <p>The specialized design activities which include fashion and interior design recorded higher earnings at 77.2 per cent in comparison to advertising which had 22.8 per cent.</p>	<p><b>Key Players</b></p> <p>In this domain, the supportive institutions include training schools such as the schools of Art and Design in Universities and other tertiary institutions. There are some private enterprises that provide specialized training in design and fashion. There are also various enterprises involved in graphic designs around the country many of which focus on printing services.</p> <p><b>Economic Activities</b></p> <p>Enterprises under this sub-sector are involved in fashion design, art and design, graphic designs for the printing and publishing industry as well as broadcasting and entertainment</p> <p><b>Contribution to employment</b></p> <p>The Uganda Mapping report puts the number of those directly employed in CCIs in the natural heritage domain at 108,971 the majority of whom (67.2%) are female while males are 32.8%.</p> <p><b>Contribution to gross revenue</b></p> <p>In terms of total revenue from foreign and local sales of products and services by institutions in this domain in the financial year preceding this study was conducted in, 60.3% of the players earned between USD 0-5,000, 11% earned between USD 5,001-10,000, 9.6% earned between USD 10,001-50,000, 8.2% earned between USD 50,001-100,000, 5.5% earned between USD 100,001-500,000 and 5.5% earned beyond USD 500,000.</p>

Tanzania	Burundi
<p><b>Key Players</b></p> <p>Data available in Country report is not disaggregated to domain level</p> <p><b>Economic Activities</b></p> <p>Data available in Country report is not disaggregated to domain level</p> <p><b>Contribution to employment</b></p> <p>Data available in Country report is not disaggregated to domain level</p> <p><b>Contribution to gross revenue</b></p> <p>In terms of total revenue from foreign and local sales of products and services by institutions in this domain in the financial year 2014/15, 74% of the players earned between USD 0-5,000, 16% earned between USD 5,001-10,000, 6% earned between USD 10,001-50,000, 4% earned between USD 50,001-100,000, 0% earned over USD 100,000.</p>	<p><b>Key Players</b></p> <p>Data available in Country report is not disaggregated to domain level</p> <p><b>Economic Activities</b></p> <p>Data available in Country report is not disaggregated to domain level</p> <p><b>Contribution to employment</b></p> <p>Data available in Country report is not disaggregated to domain level</p> <p><b>Contribution to gross revenue</b></p> <p>In terms of total revenue from foreign and local sales of products and services by institutions in this domain in the financial year preceding this study was conducted in, all the players (100%) earned between USD 10,001-50,000.</p>



The House of Wonders or Palace of Wonders (in Arabic: Beit-al-Ajaib) is a landmark building in Stone Town, Zanzibar. It is one of six palaces built by Barghash bin Said, second Sultan of Zanzibar, and it is said to be located on the site of the 17th-century palace of Zanzibari queen Fatuma. The House of Wonders currently houses the Museum of History and Culture of Zanzibar and the Swahili Coast.

## 4.2.7 Cultural Tourism

Table 28: Unpacking Culture and Creative Industries in the Cultural Tourism Domain

Kenya
<p><b>Key Players</b></p> <ul style="list-style-type: none"> <li>● They range from cultural festivals like the annual Loiyangalani festival in Northern Kenya, Lamu, Malindi, vihiga cultural festivals to traditional spiritual site tours to the Mijikenda Kayas in Coastal Kenya,</li> <li>● In addition to Kit Mikayi in Nyanza, the Crying Stone and Mwibale wa Mwanja in Western, Baringo hot springs and Maasai Manyatta Villages in Rift Valley, Mukurwe wa Nyagathanga in Central Kenya and Nomadic lifestyle/settlements attractions across Northern Kenya.</li> <li>● Other cultural tourism destinations include Bombolulu in Coast, Bomas of Kenya in Nairobi, Mumias cultural centre in Western, Arror cultural centre in Rift valley and Kisumu National Museum in Nyanza among others.</li> <li>● There was a higher proportion at 94.2 per cent of the foreign visitors visiting cultural events as compared to the 5.8 per cent visiting the cultural sites.</li> <li>● They range from cultural festivals like the annual Loiyangalani festival in Northern Kenya, Lamu, Malindi, vihiga cultural festivals to traditional spiritual site tours to the Mijikenda Kayas in Coastal Kenya, Kit Mikayi in Nyanza,</li> <li>● the Crying Stone and Mwibale wa Mwanja in Western, Baringo hot springs and Maasai Manyatta Villages in Rift Valley,</li> <li>● Mukurwe wa Nyagathanga in Central Kenya and Nomadic lifestyle/settlements attractions across Northern Kenya.</li> <li>● Other cultural tourism destinations include Bombolulu in Coast, Bomas of Kenya in Nairobi, Mumias cultural centre in Western,</li> <li>● Arror cultural centre in Rift valley and Kisumu National Museum in Nyanza among others.</li> </ul>
<p><b>Contribution to employment</b></p> <p>Data available in Country report is not disaggregated to domain level</p>
<p><b>Contribution to gross revenue</b></p> <p>In terms of total revenue from foreign and local sales of products and services by institutions in this domain in the financial year preceding this Study, all 100% of the players earned between USD 0-5,000.</p>



Uganda	
<p><b>Key Players</b></p> <p>The Ministry of Tourism, Wild life and Antiquities is the lead institution under this domain with the Uganda Tourism Board as the principal agency for tourism. Other key government institutions include; the Ministry of Gender, Labour and Social Development and the Uganda Export Promotion. The traditional/cultural institutions also play a key role in the development and promotion of cultural tourism. The private enterprises in this domain include; tour and travel agencies, transport operators, hotels and gift shops for cultural products.</p>	
<p><b>Economic Activities</b></p> <p>This domain includes; Cultural travel and tourist services, Hospitality and accommodation. The domain is dominated by tour and travel, hospitality promotion of sites and museums, sale of art and crafts and performances by cultural groups.</p>	
<p><b>Contribution to employment</b></p> <p>Data available in Country report is not disaggregated to domain level</p>	
<p><b>Contribution to gross revenue</b></p> <p>In terms of total revenue from foreign and local sales of products and services by institutions in this domain in the financial year preceding this Study 23.1% of the players earned between USD 0-5,000, 26.9% earned between USD 5,001-10,000, 23.1% earned between USD 10,001-50,000, 11.5% earned between USD 50,001-100,000, 11.5% earned between USD 100,001-500,000 and 3.9% earned beyond USD 500,000.</p>	
Tanzania	Burundi
<p><b>Contribution to gross revenue</b></p> <p>In terms of total revenue from foreign and local sales of products and services by institutions in this domain in the financial year immediately before the one this study was conducted in, 0% of the players earned between USD 0-5,000, 66.7% earned between USD 5,001-10,000, and 0% earned between USD 10,001-50,000, 0% earned between USD 50,001-100,000, 33.3% earned between USD 100,001-500,000 and 0% earned beyond USD 500,000.</p>	<p><b>Contribution to gross revenue</b></p> <p>In terms of total revenue from foreign and local sales of products and services by institutions in this domain in the financial year immediately before the one this study was conducted in, all 100% of the players earned between USD 0-5,000.</p> <p>In terms of total revenue from foreign and local sales of products and services by individuals in this domain in the previous financial year, all 100% of the individual players earned between USD 0-5,000. None earned above this income.</p>

## 4.2.8 Sports and Recreation

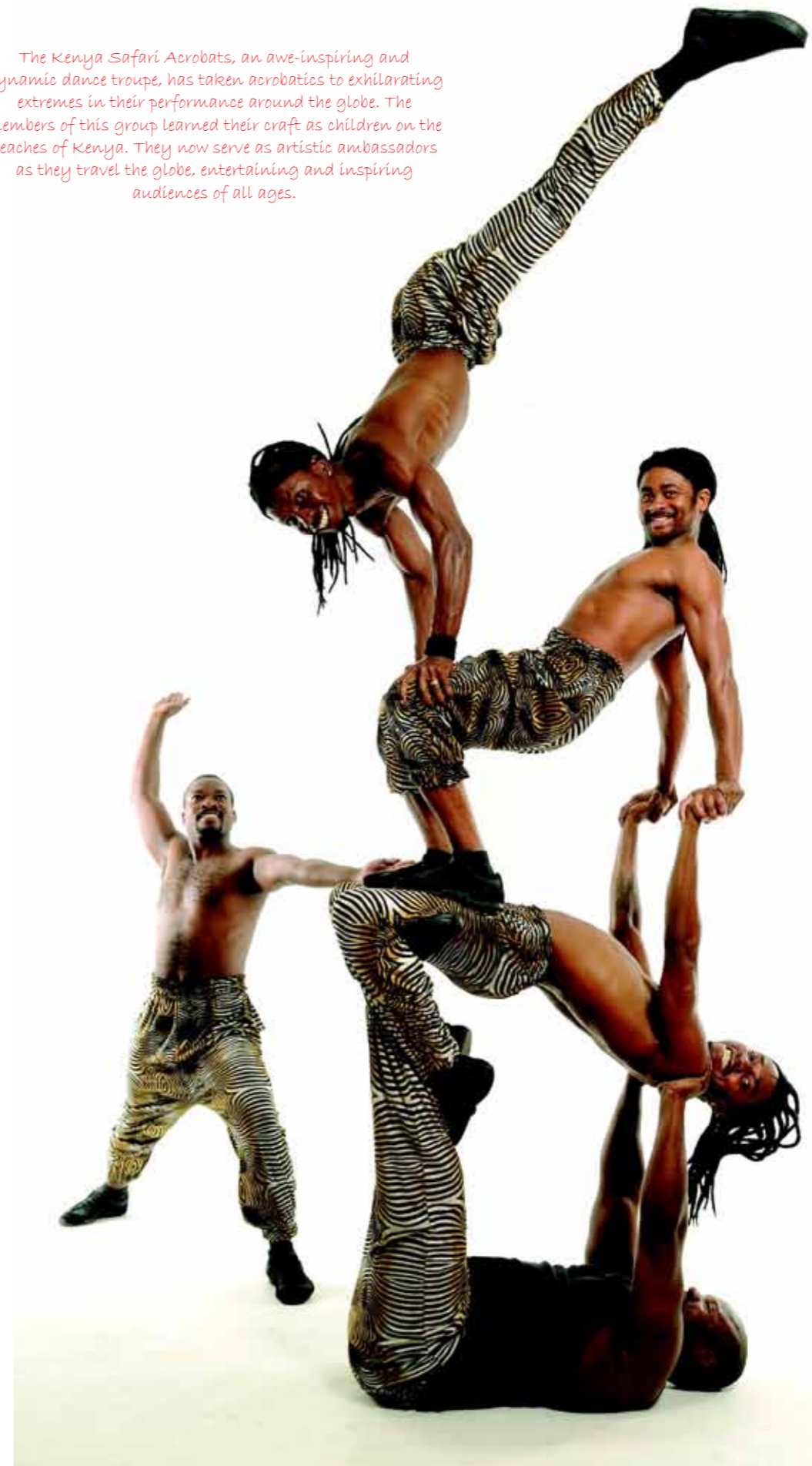
Table 29: Unpacking Culture and Creative Industries in the Sports and Recreation Domain

Kenya	Uganda
<p>Information availed in the national report was scanty and focused only on traditional sporting activities</p> <p><b>Key Players</b> Not given</p> <p><b>Economic Activities</b> This domain covers the community specific recreational pastime activities. In Kenya the activities include wrestling competition, bull and cock fighting in Western Kenya, boat/dhow and donkey racing in Coast , Camel derby and Pokot Moran peace run in Rift Valley, Canoe racing in Nyanza and Ajua bao board games found countrywide. These are often patronized as part of larger communal festival events. The organization of the traditional sports events is mainly undertaken at the community level and some attract sponsorships.</p> <p><b>Contribution to employment</b> The sector provides employment in the development and manufacturing of traditional sports equipments thus contributing to the economy.</p> <p><b>Contribution to gross revenue</b> Data available in Country report is not disaggregated to domain level</p>	<p><b>Key Players</b> The Ministry of Education and Sports is the lead institution under this domain with National Council of Sports as the principal agency for tourism. Other key institutions include the various federations, associations and clubs. The private enterprises include fitness and health clubs that are usually situated in hotels.</p> <p><b>Economic Activities</b> The domain is dominated by sports leagues, galas and competitions, health and fitness activities. These generate revenue and provide employment.</p> <p><b>Contribution to employment</b> Both men and women are employed under this domain with the majority of professionals being men. There are many non-professional men and women employees in this domain</p> <p><b>Contribution to gross revenue</b> In terms of total revenue from foreign and local sales of products and services by institutions in this domain in the financial year immediately before the one this study was conducted in, 72.5% of the players earned between USD 0-5,000, 7.5% earned between USD 5,001-10,000, 10% earned between USD 10,001-50,000, 2.5% earned between USD 50,001-100,000, 0% earned between USD 100,001-500,000 and 7.5% earned beyond USD 500,000.</p>
Tanzania	Rwanda
No data was available for this domain	No data was available for this domain
Burundi	
No data was available for this domain	

<sup>1</sup> Through KNLS, the government has established 59 community libraries throughout the country as well as mobile libraries to reach marginalized areas. Some of the key libraries include: the Buru Buru Complex library; Nakuru library; Narok Library; Camel mobile library and the National library in Nairobi

<sup>2</sup> Kenya Film Commission (2012) Economic contribution of the Film Industry in Kenya available from the website <http://www.kenyafilmcommission.com/images/EconomicContributionofFilmIndustryinKenya.pdf>

The Kenya Safari Acrobats, an awe-inspiring and dynamic dance troupe, has taken acrobatics to exhilarating extremes in their performance around the globe. The members of this group learned their craft as children on the beaches of Kenya. They now serve as artistic ambassadors as they travel the globe, entertaining and inspiring audiences of all ages.





# CHAPTER 5: CONCLUSIONS AND RECOMMENDATIONS



## 5.1 Introduction

This section presents the key conclusions and recommendations derived from the analysis of findings. They are presented according to the objectives of the study.

## 5.2 Conclusions

### 5.2.1 Model and Potential of the EAC creative industries

#### Models

The EAC zeroed in on the UNESCO model as the most fitting to EAC policy, statistical and programming interests. It presents a more dominant and cross cutting classification. It clusters Cultural and Creative Industries according to the following themes:

#### Industries in core cultural domains

- Museums, galleries, libraries
- Performing arts
- Festivals, Visual arts,
- Crafts Design



*EAC Partner States are still big net importers of cultural products*

- Publishing, Television,
- Radio, Film and video
- Photography
- Interactive media

#### Industries in expanded cultural domains

- Musical instruments
- Sound equipment
- Architecture
- Advertising
- Printing equipment
- Software
- Audiovisual hardware

These are further classified into the following eight broader domains as defined by the UNESCO Framework for Culture Statistics (2009):

- **Performing Arts and Celebrations:** Institutions dealing in Performing Arts (local dances), Music, Festivals, Fairs and Feasts;
- **Visual Arts and Crafts:** Institutions dealing in Fine Art, Photography and Crafts (goods made by hands);
- **Audio Visual and Interactive Media:** Institutions dealing in the Film and Video industry, TV, Radio stations and Internet café;
- **Design and Creative Services:** These include; Fashion Design (tailoring), Graphic Design, Interior Design, Landscape Design, Architectural Services and advertising services;
- **Books and Press:** Institutions dealing in the production and selling of books, Newspapers and Magazines, other printed materials, literary works and Book Fairs;

- **Cultural Tourism:** Cultural travel and tourist services, Hospitality and accommodation services;
- **Intangible Heritage:** Institutions dealing in Oral traditions and expressions, rituals, languages, social practices and local rituals; and
- **Sports and Recreation:** This includes organized or competitive sports as well as physical fitness and well-being and physical recreation activities.

### Potential of Cultural and Creative Industries

The creative industries economy has a lot of potential to bring about more inclusive and faster development in East Africa considering that creative industries are amongst the main dynamic sectors of world trade, growing steadily in recent years and is one of the most rapidly growing sectors in East Africa not only in income, but also job creation, women and youth participation as well as export trade.

Considering that more than 40% of operatives are women and given the gender face of poverty in most EAC countries, the development of the sector offers a chance for income generation among women who are skilled and talented in culture and creative areas and hence inclusive development in the region.

Unfortunately, there is not enough data available for the creative services to illustrate their clear status. Further, Africa is still contributing marginally to world CCI exports.

### 5.2.2 Characteristics and key players of the various creative industry “sectors”

Compared to other industrial sectors such as manufacturing, culture and creative industries in EAC have the larger number of suppliers and purchasers as well as more diversified consumers. Therefore, firms (especially SMEs) face bigger difficulties in exporting because of information asymmetry, giving rise to the need for government assistance. Accordingly, the governments of EAC needs to provide export funding and foreign market information specialized for creative industries, support creative firms’ participation in international trade shows and formation of networks at EAC level, and include competitive creative firms in business and trade delegations.

Performing Arts and Celebration is the most predominant domain in the region in terms of participation of both women and men players. Culture Tourism attracts the least level of participation. At present, music is arguably the most prominent sector of the creative economy in East African countries.

In all countries that gave data on participation by gender and domain, the majority of women operatives were found in Design & Creative Services, Performing Arts & Celebrations and Visual arts & crafts. On the other hand, young people are dominant in the domains of Performing Arts and Celebration;

Audiovisual and Interactive media; Design and Creative Services; Books and Press; Cultural Tourism and Sports and Recreation. This implies that other factors being constant, anyone interested in youth and women participation in the economy should prioritize investments in the domains of Performing Arts & Celebration and Design & Creative Services.

Culture and Creative industries in the EAC region are dominated by Small and Medium size Enterprises (SMEs) with limited earnings. This means that these industries are also vulnerable to challenges that generally face SMEs in the region.

The biggest percentage of formally registered Culture and Creative Industry Institutions (CCII) are private sector companies. A gendered look at the Culture and Creative Industries in East Africa reveals that they are male dominated to the tune of 60%

Most of the individuals operating in the industry have acquired at least an ordinary certificate of education. This means they are trainable and have a high chance of increasing their skills and knowledge levels of the industry if such opportunities came their way.

### 5.2.3 Policy Environment in EAC Partner States

Policies and regulation to culture and creative industries are weak and often not implemented which affect creative industries negatively. Creative firms give positive effects on identification of new consumer demands, provision of new solutions and concepts, provision of new approaches to known problems, joint development of ideas are not adequately supported by Governments in East Africa. The governments need to give incentives for them to connect with domestic and foreign markets.

Issues highlighted in this area point to the need for responding to the needs of the sector from a regional perspective which provides a coherent framework for more appropriate policy responses at country level in EAC.

### 5.2.4 National and International Statistics of Culture Industries

The expansion of the mobile telephone and internet sectors has had a significant impact on the creative economy in the region. It is noticeable that most institutions in the culture and creative industry communicate mainly through telephone across all partner states. Internet adverts are the most used marketing strategies by institutions in the Cultural and Creative Industries followed by use of radio adverts and word of mouth.

The Culture and Creative Industries in the region depend mainly on the national and local markets for consumption of products and services they produce. However, because of Kenya’s high dependency on international markets, overall, the Local, National and International markets are very strategically important for this industry in the EAC.

Skills and knowledge acquisition in countries is done mainly through self-training implying that skills development in CCIs is not yet adequately formalized and institutionalised in EAC countries.

### 5.2.5 Socio-Economic Data of the Regional Creative Businesses

Analysis in Chapter 3 highlights the fact that CCIs thrive better in urban environments where supportive social and physical infrastructure like clean water, electricity, performing facilities like halls, market access, training institutions, financial institutions etc are found.

In general, collection and utilization of statistics among CCIs and by Governments across the EAC region is very poor. There is very scanty statistics being collected and used particularly in the domains of culture and natural heritage, culture and tourism, intangible cultural heritage as well as sports and recreation.

There is reasonable good contribution in financing the industry by private funding. However, there is very little subvention support from Governments. Noting that the kind of policy, social and physical infrastructure required to significantly transform the creative economy lies largely in Government hands, it is only fair to imagine increased prioritization of this sector by Partner States will bring significant dividends.

### 5.2.6 Critical issues and challenges of Creative Industry Businesses

Creative industries are one of the fast growing sectors in emerging countries and in EAC as well. Emerging countries' imports of creative goods and services has rapidly increased during the last decade. However, there exist diverse obstacles for exporters and investors, lack of information

on regulations, consumer tastes and market structures.

The African continent, and by implication, the EAC region, has a deep pool of talent but lacks the infrastructure and capacity to commercialize its creative talent and reap the vast fortunes that are lying in wait.

The creative industries are particularly interesting for EAC region because, given the region's rich artistic heritage and cultural traditions, they can help economies diversify and avoid an overdependence on limited natural resources.

In the East African Community, creative industries are not yet fully developed due in part to lack of technical support, incentives, infrastructure, financial and educational support from EAC members and businesses. Human resources are a major limitation to the industry. Piracy is rearing its ugly head on those investing in the sector. There is inadequate protection for intellectual property rights relating to culture. Enforcement of existing legislation is weak. Mechanisms to counter cyber-piracy are not well developed. There are also inadequate mechanisms for the protection of communal Intellectual Property Rights (IPR) and Access to and Benefit Sharing (ABS) arising from the sector. The EAC will need to address issues of financing, human resource, markets and also piracy within the industry in collaboration with Partner States.

The rise of the digital economy and the increasing commercialization of the arts on the other hand have created a window of opportunity for the EAC to exploit the latent economic potential of the creative economy and to explore sustainable options for socio-economic development.

**Finally, EAC Partner States are still big net importers of cultural products!**

**This needs to be reversed.**

## 5.3 Recommendations

This section presents what the study captured as key issues that need redress and the recommendations on actions considered appropriate to address those issues. Table 27 below summarises this picture.

Table 30: Critical Issues and Recommendations for Improvement of the Creative Economy

Emerging Key Issues	Recommendations
Inadequate culture statistics at all levels within the region	Establish a statistical framework for the region. Any studies conducted at country level should take into consideration information needs at regional level. This can be done at the time of developing Terms of Reference for the country studies. Regional Office should consider supporting Member States to conduct regular studies on CCIs.
'Inadequate' access to business financing for cultural industries	Establish a special fund/ products to support cultural industries
Limited specialized training in Management, production and marketing of cultural goods and services	Establish partnerships with training institutions to promote/ undertake skills training
Limited access to national, regional and international markets for cultural goods and services	<ul style="list-style-type: none"> <li>● Conducting market research and disseminate market information and intelligence to sector operatives</li> <li>● Develop regional events (such as regional galas, festivals and exhibitions for products and services of culture and creative industries) that can boost and attract markets for creative industries</li> <li>● Adopt ICT tools for marketing cultural goods and services</li> </ul>
Inadequate enforcement of copyright and intellectual property laws	<ul style="list-style-type: none"> <li>● Create awareness of the copyright and intellectual property laws among producers and other actors in the cultural industries sector</li> <li>● Produce simplified versions of existing laws and translate them into local languages</li> <li>● Strengthen the capacity of the duty bearers to enforce existing laws</li> </ul>
Quality of cultural goods and services	<ul style="list-style-type: none"> <li>● Encourage producers to form cooperative societies to facilitate standardization and bulk marketing of products</li> <li>● Facilitate local producers to acquire equipment that can help with improving quality of the products</li> </ul>



© Umojah Sound System

Umojah Sound System was started in 2016 by a group of reggae fans and sound system enthusiasts in Kenya, it is the first of its kind and is currently the only reggae/dub style sound system built in the region.

## ANNEX: MATRIX OF ACTIONS AND STRATEGY FOR DISSEMINATION OF MAPPING INFORMATION TO STAKEHOLDERS

Stakeholders	Type of Information required	Means of disseminations/	Responsible Agency/ Institution
<b>Government Policy Makers</b>	<ol style="list-style-type: none"> <li>1. Understand Culture in National and regional development</li> <li>2. Policy environment relevant to culture</li> <li>3. The Role of Government in development and promotion of culture and creative</li> <li>4. Culture in the context of EAC regional cooperations and Integration</li> <li>5. Segments of Culture and creative Industries</li> <li>6. Statutory frameworks and instruments of protecting and promoting culture including National and regional laws, instruments and strategies</li> </ol>	<ul style="list-style-type: none"> <li>● Policy foras, meetings and workshops,</li> <li>● National and regional conferences</li> <li>● Research dissemination.</li> <li>● Policy Trainings,</li> <li>● Dissemination through Policy Briefs,</li> <li>● Inter-Ministerial Meetings</li> <li>● Parliamentary forum</li> <li>● Media reports and press briefings</li> </ul>	<ul style="list-style-type: none"> <li>● EAC Secretariat</li> <li>● Ministries of EAC</li> <li>● Ministries of Trade</li> <li>● Ministries of Culture</li> <li>● Media</li> </ul>
<b>Government Technocrats</b>	<ol style="list-style-type: none"> <li>1. Understand culture in National and regional development</li> <li>2. Scope, dimensions and segments of culture and creative industries</li> <li>3. The Status of culture and creative Industries</li> <li>4. The Contribution of Culture in National Development</li> <li>5. Development Needs of culture and creative sector</li> <li>6. Policy and regulatory environment for culture and creative Industries</li> <li>7. Statistical trends in culture and creative industries in the economy</li> <li>8. Capacity gaps and constraints</li> <li>9. Recommended Policy and development interventions needed to spur culture and creative economy</li> <li>10. Operatives, size and structures</li> </ol>	<ul style="list-style-type: none"> <li>● Workshops and seminars</li> <li>● Baseline surveys and disseminate</li> <li>● Media reports</li> <li>● Dissemination of Policy briefs</li> <li>● Networking between Government ministries and agencies</li> </ul>	<ul style="list-style-type: none"> <li>● EAC Secretariat</li> <li>● Development Partner</li> <li>● Trade Ministries</li> <li>● Culture Ministries</li> </ul>

Stakeholders	Type of Information required	Means of disseminations/	Responsible Agency/ Institution
<b>Development Partners</b>	<ol style="list-style-type: none"> <li>1. Development Needs of Culture sector</li> <li>2. Culture and development of National economies</li> <li>3. Regional Strategies and Programmes on Culture</li> <li>4. Culture and Creative sector in Development and National medium term Expenditure Frameworks</li> <li>5. Policy Framework</li> </ol>	<ul style="list-style-type: none"> <li>● Dissemination of Regional and National Strategies</li> <li>● Working Groups with donors</li> <li>● Government Memoranda</li> <li>● Policy documents</li> <li>● Planning frameworks</li> <li>● News letters</li> <li>● Press releases</li> <li>● Press briefs</li> <li>● National Events and programme</li> </ul>	<ul style="list-style-type: none"> <li>● EAC Secretariat</li> <li>● Ministries of EAC</li> <li>● Ministries of Trade</li> <li>● Ministries of Culture</li> <li>● Media agencies</li> </ul>
<b>Business Community</b>	<ol style="list-style-type: none"> <li>1. Trade and Market information such as consumers, trends, suppliers, segments of the markets, demand trends, market access requirements in international markets, prices, competitions, quality standards</li> <li>2. Regulatory framework such as tax regimes and other restrictive measures</li> <li>3. Policies of Government</li> <li>4. Government Incentives and support schemes</li> <li>5. Opportunities such as financing, technology transfer,</li> <li>6. Markets distribution networks and channels</li> <li>7. National Regulations and requirements</li> <li>8. Business networks</li> <li>9. Resource endowment and skills available</li> <li>10. National laws and International laws</li> <li>11. Cultural and creative statistical data</li> <li>12. Financing schemes and investment</li> </ol>	<ul style="list-style-type: none"> <li>● Dissemination of Market studies and information briefs</li> <li>● Online disseminations-web information</li> <li>● Dissemination through Business Associations</li> <li>● Conduct Training seminars and workshops targeting business community</li> <li>● Information brief on Incentives and tax regimes</li> <li>● Create One Stop Centres for Information</li> <li>● Media campaigns</li> <li>● Press releases</li> <li>● Exhibitions, shows, Gallas, festivals</li> <li>● Business to Business meetings,</li> </ul>	<ul style="list-style-type: none"> <li>● EAC Secretariat</li> <li>● Trade Ministries</li> <li>● Private sector</li> <li>● Sector Associations</li> <li>● Business Associations</li> </ul>
<b>Civil Society</b>	<ol style="list-style-type: none"> <li>1. Culture and Creative Industries in National development</li> <li>2. Culture and creative Industries in community development</li> <li>3. Culture and Creative Industries in Poverty reduction, social inclusion,</li> <li>4. Role of Non State Actors in development of culture and creative industries</li> <li>5. Culture and other sectors of the economy</li> </ol>	<ul style="list-style-type: none"> <li>● National Plans and Strategies</li> <li>● Research and baseline reports</li> <li>● Sector studies reports</li> <li>● Policy reports</li> <li>● Media releases</li> <li>● Sector studies reports</li> </ul>	<ul style="list-style-type: none"> <li>● EAC Secretariat</li> <li>● Regional Governments</li> <li>● Culture Ministries</li> <li>● Sector Associations</li> </ul>

Stakeholders	Type of Information required	Means of disseminations/	Responsible Agency/ Institution
<b>Media</b>	<ol style="list-style-type: none"> <li>1. Trade and Market information such as consumers,</li> <li>2. Trends, suppliers, segments of the markets,</li> <li>3. Demand trends, market access requirements in international markets, prices, competitions, quality standards</li> <li>4. Regulatory framework such as tax regimes and other restrictive measures</li> <li>5. Policies of Government and Regional Policies</li> <li>6. Intervention projects in Creative Industries</li> <li>7. Government Incentives and support schemes</li> <li>8. Opportunities such as financing, technology transfer,</li> <li>9. Markets distribution networks and channels</li> <li>10. National Regulations and requirements</li> <li>11. Business networks</li> <li>12. National laws and International laws</li> </ol>	<ul style="list-style-type: none"> <li>● Sector studies</li> <li>● Policy reports</li> <li>● Workshops and meetings</li> <li>● Networking events</li> <li>● Festivals, events and gallas</li> <li>● Exhibitions and shows</li> </ul>	<ul style="list-style-type: none"> <li>● EAC Secretariat</li> <li>● Ministries of EAC Affairs</li> <li>● Ministries of Trade</li> <li>● Ministries of Culture</li> <li>● Ministries of Information</li> </ul>





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**PUBLISHED BY:**

East African Community (EAC)

**PHOTO CREDITS:**

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Sauti za Busara  
Umoja Sound System  
Nigel Pavitt

**PUBLISHING DATE:**

June 2019

Cataloguing-in-Publishing Data: East African Community, Mapping of Culture and Creative Industries in the East African Community (2019), Arusha.

**ISBN: 978 9987 712 89 2**