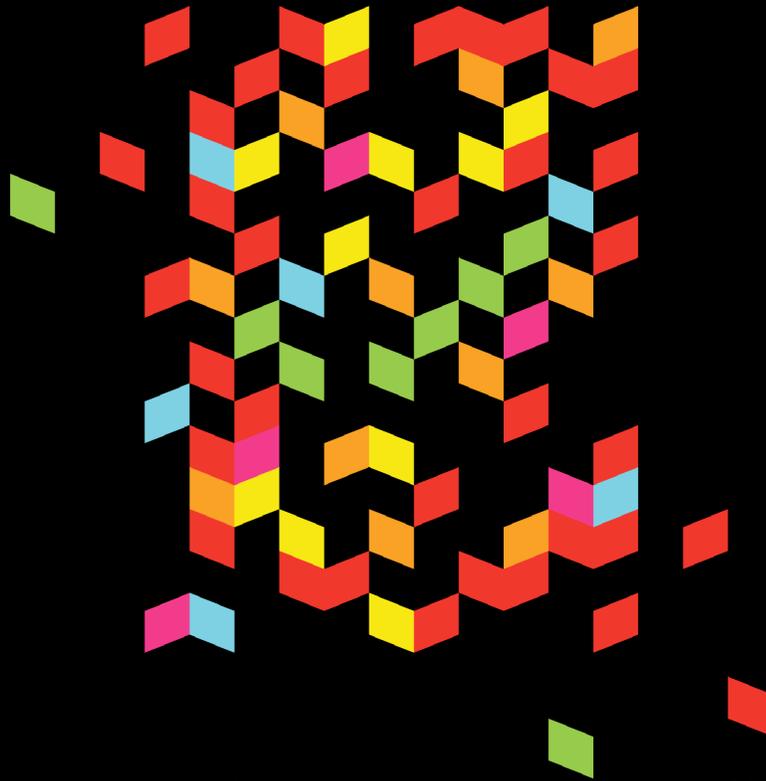


RESEARCH INTO THE IMPACT OF ARTS, CULTURE
AND CREATIVE INDUSTRIES ON AFRICA'S ECONOMY

NIGERIA



Developed and delivered by Agoralumiere International in partnership with CAJ (South Africa)
Commissioned by ARTERial Network
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THE ARTERIAL NETWORK



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The ARTerial Network is an informal, dynamic network of individuals, institutions and funding partners working to support the effectiveness and growth of African arts and culture in civil society and to enhance the sustainability of arts, culture creative industries in Africa. www.arterialnetwork.org

STICHTING DOEN is a Foundation from the Netherlands working towards the achievement of a liveable world in which everyone has a place. Acting within its four fields of operation of Sustainable Development, Culture, Welfare and Social Cohesion, the DOEN Foundation provides subsidies where necessary, and arranges loans and equity investment where possible. www.doen.nl



The Stromme Foundation is a development organization from Norway, helping poor people in the global South to climb out of poverty through microfinance and education. www.stromme.org

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1. Introduction to the global project

Agoralumiere's priority has been to redesign and conceptualize a new and broader model for the proposed study project to be in line with the African global development vision and agenda. Our priority was also to use this pilot project as a concrete implementation phase of the African Union Plan of Action for Cultural and Creative Industries in Africa (2008) in terms of the topic of the research and in terms of the procedures.

The initial request for this work was based on the primary objective for the « study into the impact of arts on the Africa's economy ». Nevertheless, Agoralumiere and its Partner CAJ attempted to point out issues that would have direct relevance to the study in the context of new trends of the creative industries in which both organizations are working.

Agoralumiere and CAJ redesigned the framework of the global project with the agreement of the Arterial Secretariat to include the creative sector and reformulate it as « Research into the Impact of Arts, Culture and Creative Industries on Africa's economy ».

Agoralumiere worked to create a common operational platform where:

- Each country authorities through its various ministries and its creative stakeholders would own the project to fit in line with their national priorities and local needs;
- The national research teams to be trained in this specific and new field of creative industries and creative economy;
- Our expertise service provider and Partner CAJ to perform training and collect existing available research material on this topic in Africa over the last five years.



The research project has also sought to:

- identify and strengthen existing national individual researchers or research structures;
- connect with similar activities through the different structures or bodies on the Continent in order to avoid possible duplication;
- respect and strengthen existing national agendas in order to avoid conflicting programmes.

This pilot study shows the necessity to work with the country's various ministries and stakeholders and the need to provide capacity building to national and local researchers through the training session. It also highlights the importance of building relationships among all parties in the interest of the local populations in their struggle against poverty. One of our major concerns was to ensure governments adhere to this project before starting any activity on the ground.

Our main focus in the management of this project was emphasized on the tangible relevance it would have for the country and its stakeholders in their strategies towards developing their creative sectors. We were also very keen on how it could provide relevant evidence to convince other countries to get involved in this research exercise on the potential of their own national creative sector.

Agoralumiere also aimed to show evidence on the creative industries for the current funders to continue to support our work in further developing this programme with its inclusive methodology as Agoralumiere considers that the concrete engagement of African institutions, governments, national researchers and stakeholders is a prerequisite condition for a real, adapted, effective and sustainable development of the creative industries and creative economy in African countries.

The scope of this research as agreed in the initial contract, should be considered as a starting point but it is hoped that ground has been laid for follow up in the pilot country as well as for the initiation of the project in the many other African countries which have formulated their request to Agoralumiere for this research programme.



1.1 Methodology of Global Research Project

The main methodology employed to engage governments in this project was:

- Meetings with Ministers identified to be main actors in the cultural and creative sector;
- Meetings with creative stakeholders;
- Meetings with local research teams formed in the pilot countries to present the project, develop together the local procedure for country ownership and the Ministry leadership in the implementation.

The leading Ministry and its experts provide inputs to adapt the project to their national context and local needs.

The researchers selected by the national mentor and the leading Ministry participated in a first tri-partite preparatory session.

The selected research teams of both pilot countries went to Addis Ababa to attend a 10 day training session organised by Agoralumiere under the leadership of the Africa Union. The training session was carried out by Mrs Avril Joffe, CEO of CAJ (South Africa).

CAJ was commissioned to deliver the first collation of research work conducted on this topic in Africa during the last five years. The first part of this research was delivered in May 2009.

Agoralumiere and the country-leading Ministry received the inception reports, then drafts of the research reports for comments, guidance and approved the final reports which provided answers to national needs and priorities.



1.2 Constraints and Limitations

Buy in of the host country and national ownership of project.

The first obvious challenge was receiving the agreement of the national authorities to the project. Agoralumiere considered that this buy in by government and national stakeholders was an important step towards achieving serious and sustainable development for this programme in the respective countries.

Modifications of roles and responsibilities due to the national ownership of the project.

The leading Ministry and the national researchers requested that the ownership and leadership of the national research programme should be done through Professor Kwanashie for Nigeria and Dr Cyril Musila, RDC. (*See Curriculum vitae of each team leader in Annex*).

The question of gender

In line with the national ownership, Agoralumiere had hands off in the selection of the national researchers as this prerogative belongs to our country partner. Therefore, the programme did not respect the gender principles of the Africa Union procedures. However, Agoralumiere raised this issue during the final evaluation meeting of the stakeholders and the Nigerian government promised to include female researchers in the second step of the national research programme.

The approval of the final report by government.

The approval of the final report and the by the Governments was a great challenge to us administrative procedures lengthy.

Agoralumiere acknowledged these drawbacks but recognized that it was the only option to get a real buy in from the government for the follow up and sustainable development of this research exercise in the country after the pilot phase.



The working environment and conditions of our researchers on the ground.

The last but not the least challenge, was the infrastructure and technical environment. If the Nigerian team encountered less difficulties in accessing internet than the DRC Congo both faced the issue of electricity shortages which created a delay in the execution of the research work.

The research teams from Nigeria had less infrastructure and technical problems in delivering their work while the team from DRC dealt with many technical issues related to a conflict and post-conflict environment.

1.3 Deliverables and Results

Three main deliverables were requested in the contract:

- **The training session**

Delivered in January 2009 by the **Madame Avril Joffe** of CAJ in Addis Ababa and a report on this training session was sent to all parties.

- **The report on the collation of the existing research work on the topic during the last 5 years.**

Madame Avril Joffe was commissioned and has delivered the report in May 2009

- **The research into the impact of Art, Culture and Creative Industries on National Economies in Nigeria and in the Democratic Republic of Congo.**

The Report on the case of Nigeria is delivered under the leadership of **Professor Mike Kwanashie**

The report on the case of DRC was delivered by **Dr Cyril Musila**

The Impact of the Arts, Culture and Creative Industries on Nigeria's Economy

By
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and Kola Oladukun

Under the leadership of Agoralumiere International and with the support of the
Federal Ministry of Commerce and Industry
2009

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Acronyms

DCMS	Department of Culture, Media and Sport (UK)
GDP	Gross Domestic Product
LDCs	Less Developed Countries
MIC	Medium Income Countries
MUSIGA	Musician Union of Ghana
UNCTAD	United National Conference on Trade and Development
UNESCO	United Nations Educational Scientific and Cultural Organization
OAU	Organization of African Union
PMNA	Performing Musicians Association of Nigeria
UK	United Kingdom
SME	Small and Medium Enterprises
WIPO	World Intellectual Property Organization
WTO	World Trade Organization

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1. Introduction

Many African traditional societies have untapped creativity which could effectively make them competitive in a modern world. A close examination of the economic history of these societies shows periods when they exhibited high levels of creativity that resulted in comparable economies with those elsewhere in the world. Despite the present state of development of many of these societies there are historical evidences of the dynamism and creativeness of many of them. It is generally acknowledged that African peoples are creative, as demonstrated by a long history of unique cultural goods that have been accepted around the world. African history suggests creative peoples who have demonstrated over the centuries, skills and entrepreneurship in various areas of the creative economy. African arts and craft, music, films, textile, architectural designs have shown the quality that could make them competitive items of trade. The skills exhibited in these areas are rooted in the African experience. These skills are, however, generally on the decline as it has been argued that long periods of marginalization worsened in the present epoch of globalization has undermined the creativity of traditional societies. It is generally expected that if this is reversed it would promote economic growth and contribute to poverty alleviation. Analysts have argued that modernization, apart from the many positive impact it has had on African societies, has tended to destroy local creativity and subjugated local peoples to foreign culture and mindset. Cultural revival is therefore expected to empower African peoples to take their place not just on the cultural map of the world but in transforming these societies into viable participants in the global economy. Cultural goods if properly packaged and marketed could play an important role in creating a niche for African societies in the emerging global economic system. For this to happen it is necessary to establish the extent of the creativity of African society and the possibility of transforming them into tradeable commodities. There is no doubt that many aspects of African culture, particularly in the area of dance, music and arts have influenced active industries around the world but questions exist as to the ability of these societies to package cultural activities into marketable goods that can penetrate global markets. It is argued that even local markets have not been fully exploited.

Museums around the world boast of artifacts from many African countries contributing to the economic viability of these museums. Museums in Africa are hardly patronized and cannot be economical. African creativity is however beyond culture. The creativity of the African people manifests itself outside narrow cultural areas.

This has to be investigated and areas of comparative advantage established. African ingenuity in designs, textiles and even science and technology can be a source of economic growth, employment generation and wealth creation. The inability to commercialize research findings in science and technology has dampened numerous inventors and creators in these areas.

For now, there are lots of claims to potentials in Nigeria as in the rest of Africa. A major challenge to policy makers is establishing what these potentials are and developing strategies for actualizing them. In an increasing interdependent world, Africa believes that it can contribute to world civilization through its creativity and richness of her cultural industries. A major challenge of leadership in these countries has been the ability to mobilize the creativity of their people and harness them for growth and development. Cultural policies in Nigeria have not only emphasized the need to preserve the various cultural heritages of the Nigerian people but also to promote them for the advancement of society. Traditional and cultural industries are recognized in government's efforts at promoting small and medium scale enterprises in the country. Communities have been encouraged and mobilize to continue age long creative activities that contribute to the economic and social wellbeing of the population. Their contribution to economic growth might still be low, but it has been argued that they hold the key to rural industrialization and urban invigoration. The mushrooming of fashion designers as a popular SME sub-sector is driven by the creativity of ordinary people. The promotion of local textile in some locations in the country is reviving a creative industry. Local jeweler, bronze works and other ornamentals that characterize many local communities can contribute to local income and economic growth. Policy makers in Nigeria have to be better sensitized on the importance of the creative economy. Efforts should spread beyond cultural goods to all possible creative activity. The global economy is today driven by the knowledge industry which itself manifest in form of creativity and innovation. Nigeria has to expand her knowledge base and promote innovation by

mobilizing her creative energies and empowering her people to be creative. That is the only way she can compete and be mainstreamed into the global economy.

Nigeria is part of a number of regional and international initiatives to promote the creative economy. Greater commitment to these initiatives would assist in growing the creative economy in Nigeria.

The Dakar Plan of Action on Cultural industries was adopted in 1992 by the OAU Heads of State and Government in recognition of the potential role of cultural industries in driving economic and social development. As part of this initiative Nigeria like most countries in African has not taken all the necessary action needed to put the creative economy at the forefront of the development process. With the rapidly changing global environment African Heads of State are under pressure to take appropriate actions to speed up the development process of their countries and respond to the globalization process. Reforms have been the hallmark of policies in most of these countries. But in most cases these reforms have targeted what is considered the modern sectors of the economy. They have tended to focus on creating the environment for the modern sectors to grow. The growth drivers are often identified in the modern sectors. While there are reasons for this development, analysts are increasingly pointing to the fact that traditional and cultural industries could play a greater role in the development process. There is increasing advocacy for creative industries to feature more prominently in reform strategies in African countries. Along this line, concrete policies to promote creativity and facilitate the growth of traditional and cultural activities are expected to form part of reforms.

Nigeria recognizes the role of culture and tourism in development and has national policies on culture and tourism which aims at promoting cultural activities. What the reforms have failed to do is to effectively link culture with business so as to build a sustainable industry. The state has a strategic role to play in ensuring that the environment for growing cultural industries exists in the country.

While the state has a role to play, the responsibility of growing the creative economy still rests on the private sector. Private initiatives must drive the creative economy if it is to be sustainable. Indeed the neo-liberal reform strategy in most African countries has left the private sector to determine the nature of new investments and the industrialization process. Given the relative

strength of creative industries and the challenges they face this strategy will not directly promote the sector at the pace necessary to drive the development process.

In October 2008 in Algiers African Union Ministers of Culture further articulated a Plan of Action for Cultural and Creative Industries. The African initiative while recognizing the importance of creativity outside the cultural sector continues to articulate its strategy within that context. It is important for the Nigerian initiative to focus on the creativity of the Nigeria people and to bring together all stakeholders that are engaged in these activities.

The ministries of culture and tourism, commerce and industries, science and technology must collaborate to drive a national strategy for the creative economy. The Ministry for commerce and Industry has a particular interest in mobilizing creative industries as a tool for diversifying Nigeria's non-oil exports. Similarly Creative industries should be an important part of government's attention on Small and Medium scale Industries and should contribute to making this sector a driving force of the new economy. From the trade and the industry perspective this ministry has a special interest. This interest should lead the growth process of the creative economy in Nigeria.

Globally the concept of the creative economy is recent and is still evolving. There is however a consensus that creative assets can generate economic growth, job creation and export earning. In an export driven environment the role of creative assets has been acknowledged as growing in importance. Creative assets have been shown not only to promote economic growth and trade but also social inclusion, cultural diversity and human development. The UNCTAD XI ministerial meeting in Sao Paolo in 2004 called on the international community to help developing countries "foster, protect and promote their creative industries". UNCTAD is actively involved in policy-oriented research and pioneering trade and development analysis, to inform the promotion of creative industries and the creative economy globally. It recognizes creative industries among the emerging and most dynamic sectors in world trade.

In Nigeria the creative economy must be driven from a broad platform. Creative Economy must be articulated around creative assets embracing, Cultural, Economic, Social, Technological aspects. From the standpoint of promoting economic development, creating jobs and alleviating poverty a feasible policy option should be to use the creative economy to diversify the Nigerian

economy and improve trade and development gains within the process of globalization. The esthetic nature of culture gives way to the powers of the market. To situate the creative economy at the center of the development process it should be conceptualized to be knowledge-based economic activities characterized by intensive use of creativity to add value to products and services. In light of the globalization process it must be able to contribute to product penetration of the world economy and generate income and property rights. Cultural industries would take their direction from the creative economy and their relevance in the coherence of the national economy which is driven by the creative economy.

They will develop if the creative economy is healthy. To develop both cultural industries and the creative economy there is need to identify the creative class. Creativity as a broad based attribute has to be cultivated and nurtured. Cultural industries, creative industries and creative economy and the emergence of a creative class are all issues that Nigeria must give urgent attention.

Background of the Study

This study is part of an African wide study on the impact of creative industries in Africa. Agoralumiere International as part of the Creative Africa Project is involved in research into the impact of the arts, creative and cultural industries on Africa's economy. The arts and culture and creative industries are often marginalised in Africa and are seen to have little impact on developmental issues. The increasing realization that they have a critical role to play has stimulated interest in their potential contribution to African economies. It is expected that they can contribute to the issues of poverty eradication, rural and urban development and community livelihoods. If effectively developed they would enhance GDP growth, increase employment and expand export earnings. The aims of the project included (i) identifying African researchers in the field of the arts and creative economy and provide them with additional skills, training and mentoring to become increasingly proficient in researching and presenting the case for the economic and developmental value of the arts in the African context, (ii) initiate ongoing research into African arts and creative economy, to publish related documentation and reports on an annual basis and generally to produce the research required to inform arguments in favour of creative sector on the continent, (iii) produce the information and analysis that would feed into annual conferences on the arts and the African economy as a way of increasing public and

private support for the arts on the continent. As part of this process for Nigeria a Senior researcher and mentor Prof. Mike Kwanashie of Ahmadu Bello University Zaria, a researchers Dr. Jonathan A. Aremu, of Market Link International Group Lagos and two research assistants Mr Kinsley Okoi and Kola Oladukun of the National Gallery of Arts were selected. This team and the team from the Democratic Republic of Congo participated in the training workshop held in Addis Ababa facilitated by Joffe Avril of CAJ. The broader Nigerian team also included personnel of the Federal Ministry of Commerce and Industry Mr. Badeji Ajiboye, Mr. B.N Nwabueze and Mr. E.E Kalu. The team also worked with a wide range of specialists and actors in the creative economy of Nigeria.

Statements of problem

African societies have historically exhibited creativity in economic activities as demonstrated by their contribution to various aspects of culture. Today this creativity has definitely been minimized by the nature of technological changes and the structural shift in economies, particularly in most productive activities. To be competitive in a globalizing world Africa must promote her creative economy. This is still very weak in Nigeria despite the enormous resources available in the country. Development has been slow. The country remains one of the low income countries with low human development ranking and the level of poverty still high. How can the creative economy help address these issues? If the direction to addressing the issue of poverty and job creation is that of promoting creativity and enhancing creative industries what are the prospects in Nigeria. There is a need to assess the value of the arts and culture in the Nigerian economy. There is need to undertake a needs assessment of the sector to inform policies. We have to know what the sector looks like. What products and services are involved? Who are the stakeholders in the sector? What are the elements of the creative economy in Nigeria? How does it fit into the disarticulated structure of the Nigerian economy? What are the linkages? What are challenges to the creative economy in Nigeria? Who are the players in each part of the value chain and supporting the value chain as a whole? Who are the firms/ companies/ in each part of the value chain? What is the marketing structure of the sector? What are the spatial characteristics of the creative economy?

Research question and method

Questions framing the research

1. What is the appropriate definition of creative industries and the creative economy?
2. What is the symbiotic relationship between arts, culture and creative industries?
3. What are the needs of creative practitioners?
4. What are their threats?
5. What solutions are needed?
6. What is the direct contribution of the Creative industries to the Nigerian economy?
7. Does Nigeria have a comparative advantage in the Creative Industries and how might this contribute to diversifying Nigeria's exports?
8. Do the creative industries face barriers to growth and improved productivity?
9. What is the government's role in overcoming these?
10. Do we have any basis for creativity in our country?

Research Method

The entire project is designed to use a number of research methods as the particular question requires. The method shall be both qualitative and quantitative. At the inception stage the main focus is on wide consultation with major actors and knowledgeable individuals in the area of study. The intention is to validate the research questions and to be sure that the relevant questions are being asked. Being a relatively new concept in policy discussion in Nigeria a number of conceptual issues had to be clarified. Nigerians are conversant with the concept of culture and the narrow definition of cultural industries. Arts and crafts, music and dance are easily recognizable activities that are subject of policy discussions. Identifying the wide scope of the creative economy will excite greater interest in the creative potentials of the Nigerian people. The scope and boundaries of the subject matter had to be clearly established by the end of the project. This is important for appropriate policy response to the challenges of promoting the creative economy in Nigeria. What is the relationship between core cultural fields, cultural industries, creative industries and the broader creative economy? Wide consultations and discussions are useful method of clarifying some of these issues.

Other issues require different methodology. For example it is important to establish the precise relationship between core cultural fields, cultural industries, creative industries and the broader creative economy? Here there is need to interview actors in the core cultural fields to establish the commercial value, if any, of their activities. Traditional art form: performing, literary and visual arts – may have commercial value in themselves but might not be structured to form an industry. The capacity to replicate an art form in the quantity require to meet commercial demands might be beyond that of local art producers. The industrial structure necessary to do so might not be in existence. The mere existence of traditional art does not mean an industry is feasible. Detailed examination of the organizational form of the activities in the core cultural field would require extensive interview of the actors and collection of data and information on the activities. To become an industry capable of competing in a global environment the industrial structure must be amenable to becoming competitive. In many instances core cultural activities acquire value when they are applied to other fields.

Interviews would be necessary to establish the commercial value of downstream activities such as applied arts: advertising, design, publishing and media-related activity which often derives commercial value principally from their application in other activities. There would be need to establish the activities that they are applied to and the magnitude of the commercial value they contribute. Interviews would be necessary to collect necessary information and data. In summary the research method would include:

(1) Interviews which would require contacts with various actors and knowledgeable individual. An in-dept interview schedule has to be produced and used to collect information and data. Interviews shall take different forms. They could be structured, semi-structure or unstructured.

(2) Questionnaires would be used to collect data and information. A basic questionnaire shall be constructed. Questionnaires could be used for census of creative activities in Nigeria. Such a census is important to locate creative activities so that policy makers could better target policies. Policies makers want to know where these activities are located. To develop clusters and creative villages, knowledge of the existing location of creative industries is important. Covering the whole population would be time consuming and expensive but it would eventually be completed.

Sampling techniques would be used to collect detailed information on the various classifications of creative activities.

The six geo-political zones of the country would be adopted to form the broad sampling frame. Further aggregation into the three-region framework would also be adopted for some activities. For the film industry as an example, which is concentrated in a few locations, sampling on regional basis might be more relevant. Although random sampling technique would be most preferred in some cases purposive sampling would be adopted. This would be dictated by the nature of the research question in consideration. Where stratification is necessary it would be employed.

(3) Secondary literature review would provide useful information that would shed light on parts of the subject matter. Although concern about the creative economy is relatively recent there is a growing body of literature drawing from the experiences of a number of countries that have taken the issue very seriously. Lessons from countries that have developed strategies for promoting the creative economy will be useful in designing policies for the same purpose in Nigeria.

(4) Observation/ participant observation through visits to the various actors in the sector would provide useful information and knowledge of the various activities of creative industries in Nigeria. Field visits are thus an important element of the methodology.

(5) Focus group have often played useful role in social research. This project would use this technique in some areas.

Essence of research

This study is to furnish policy makers with a more complex understanding of the characteristics and structure of the creative industries and trends they have experienced. It will also enhance the understanding of the creative industries in Nigeria. This research aims at providing the justification for emphasis on policy for the advancement of creative industries. It hopes to make a case for the creative economy of Nigeria. This report is articulated as a strategic document to promote creative industries in Nigeria. The intention is to create a framework for promoting creative industries in Nigeria within the framework of collaborative strategy for mainstreaming the Nigerian economy into the global economy. This study would try to demonstrate that creative

economy has a concrete meaning in Nigeria. This would be proven by examining the contribution of creative industries in Nigeria.

This study as part of an Africa wide initiative hopes to drive an African wide initiative on promotion of creative economy which will contribute to policy and strategy to enhance the impact of the creative industries in Africa.

2. Conceptual Issues in Creative Industries and Creative Economy

As a new area of interest the definition of creative economy has taken different forms. Different studies have adopted slightly different definitions in line with the objective of the studies. The choice of definition is often guided by the objective of the study. The evolution of the concept might help clarify it. Initially the concerns were with cultural activities. Cultural industries flowed as it became clear that culture has an interface with industries. The organization of cultural activities as business or economic activities led to cultural industries. The idea of creative industries originated from concerns with the cultural industries. The core of the cultural industry is its creativity. Today the concern is with the broad creativity of society. The cultural element of it is still important but the dynamics of the global economy makes creativity across society more relevant.

In our case we are interested in promoting the creative power of the African society and formalizing the activities that are associated with the creative powers of the people. Creative industries are therefore a broader concept of which cultural industries are but a sub-set. Yet a broader concept which still has a more relevance to developing economies as they face the challenges globalization is that of the creative economy. Creative economy, defined as the network of institutions that support the initiation, modification and diffusion of new ideas and technologies is encapsulated by a national innovation system. Developing countries need to develop strong creative economies to be competitive on a global scale. Cultural industries have a major role to play but countries must also look at other creative sectors within the context of the national innovation system.

The creative economy is a sub-set of the national economy. The national economy provides the complex set of markets and institutions that enables an industry to grow. Creative industries need an entire industrial complex and the infrastructure and business and financial institutions that make the entire economy work. One distinction between developed and developing countries is

the fact that the economic environment for creative activities can be taken for granted in developed economies.

Developing economies are struggling with limited success to create this environment. Developing countries need to develop the necessary environment for industries of all types to thrive. The creative economy is the first step to transforming cultural activities and creativity into industries. The creative economy provides the necessary linkages required for cultural and creative industries to be formed within the dynamics of Nigeria's industrialization.

UNCTAD's definition of creative industries embraces activities ranging from traditional folk art, cultural festivities, books, painting, music and performing arts to more technology-intensive sectors, such as design and the audiovisual industry, including film, television and radio. Also contained are service-oriented fields, such as architecture, advertising and new media products, such as digital animation and video-games.

UNESCO defines creative industries as 'Those industries that combine the creation, production and commercialization of products which are intangible and cultural in nature. These contents are typically protected by copyright and they can take the form of goods or services' In UK:

'Those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property' (DCMS) These include advertising, architecture, the art and antiques market, crafts, design, designer fashion, film, interactive leisure, software, music, the performing arts, print media and publishing, software, television and radio, heritage and tourism services. WIPO copyright model (2003) defines creative industries as "All industries involved in the creation, manufacture, production, broadcast and distribution and consumption of copyrighted works" This is a more expansive definition. It encompasses the producers of the intellectual property, thus the embodiment of the creativity that is needed to produce the goods and services. It encompasses the mechanism of distribution and marketing and finally the consumers. They are all parts of the chain of the creative industrial. A comparison of four models creative industries shows the scope covered by each model. As is evident the different models cover basically the same core cultural activities and industries. The different models then add on various industries in line with their intended use of the model.

Table 1 Comparison of models of creative Industries

Models: DCMS, Symbolic Texts, Concentric Circles, WIPO: a comparison			
DCMS Model	Symbolic Texts Model	Concentric Circles Model	WIPO Copyright Model
Advertising Architecture Art and Antiques market Crafts Design Fashion Film and Video Music Performing arts Publishing Software Television and radio Video and Computer	Core Cultural Industries Advertising Film Internet Music Publishing Television and radio Video and computer games Peripheral cultural industries Creative arts Borderline cultural industries Consumer electronics Fashion Software	Core Creative Arts Literature Music Performing arts Visual arts Other core cultural industries Film Museums and libraries Wider cultural industries Heritage services Publishing Sound recording Television and radio Video and computer games Related industries Advertising Architecture Design Fashion	Core copyright industries Advertising services Copyright collection management societies Motion picture and video Music Theatre and opera Press and literature Software and databases Television and radio Photography, Visual and graphic art Interdependent copyright industries Blank recording material Consumer electronics Musician instruments Paper Photocopiers, photographic equipment Manufacture, wholesale and retail of TV sets Radio CD recorders Computers and equipment Cinematographic instruments Partial Copyright Industries Architecture Clothing, footwear Design Fashion Household goods Toys

Joffe, Avril. Understanding Creative Industries: Drivers of the creative economy, methodologies of measurement, evidence of contribution, conceptual frameworks CAJ

The UNCTAD Global Databank on Creative Economy and Industries gives 236 codes based on the classifications methodology for trade model for creative industries taking as a starting point the UNESCO framework for cultural statistics.

The number of codes included in each subgroup is as follows: design, 139 codes; arts and crafts 48 codes; visual arts, 19 codes; publishing, 18 codes; music, 7 codes; new media, 3 codes; and audiovisuals, 2 codes, summarized as follows:

Design: This is the biggest subgroup, with 139 codes. The number of codes in each subsector is as follows: fashion, 49; interior, 50; toys, 17; jewellery, 12; and graphic, 11.

- fashion – handbags, belts, accessories (ties, shawls, scarves, gloves, hats, hairpins, etc), sunglasses, headgear, leather goods, perfumes, etc. Clothing and shoes are not included.
- Interior – furniture (living room, bedroom, kitchen, and bathroom), tableware, table linen, wallpaper, glassware, porcelain, lighting sets, etc.
- Toys – dolls, wheeled toys, electric trains, puzzles, games, etc.
- Graphic and architecture – original drawings, architectural plans, etc.
- jewellery – articles of jewellery made from gold, silver, pearls and other precious metals as well as imitation jewellery.

Arts and crafts: This is the second largest subgroup, covering a total of 48 codes. The number of codes in each subsector is as follows: carpets, 16; yarn, 11; wicker ware, 5; celebration, 2; paper ware, 1; others, 13.

- carpet – includes carpets of wool or other fine animal hair, cotton, coconut fibers and other plant fiber, knotted or woven.
- yarn – handmade lace, hand-woven and needlework rugs, embroidery, bed linen, manmade or printed, knitted or crocheted materials, etc.
- wicker ware – plaits, mats, basketwork, wickerwork, etc.
- celebration – articles for Christmas, festivities, carnivals, etc.
- paper ware – handmade paper.
- others – candles, tanned or dressed fur skins, artificial flowers, wood marquetry, etc.

Visual arts: This subgroup covers 19 codes. The number of codes in each subsector is as follows: photography, 4; painting, 1; sculpture, 9; antiques, 1; and other, 4.

- photography – photographic plates for offset reproduction; photographic film and microfilms, exposed and developed.
- painting – paintings, pastels executed by hand, wooden frames for paintings.
- sculpture – statuettes and other ornamental articles of wood, porcelain, ceramics, ivory or other metals, worked carving materials.

- antiques – antiques more than one hundred years of age.
- other – collages and similar decorative plaques; original engravings, paintings and lithographs, and sculptures and statuary, in any material.

Publishing: There are 18 codes in this subgroup. The number of codes in each subsector is as follows: newspapers, 3; books, 3; other, 12.

- newspapers – newspapers, journals and periodicals.
- books – books, dictionaries, encyclopedias, brochures, leaflets, children’s drawing and coloring books and other printed matter.
- others – maps, brochures, postcards, calendars, advertising materials, etc.

Music: Music has 7 codes. It covers 6 types of recorded laser discs and recorded magnetic tapes as well as printed or manuscript music.

New media: This subgroup has 3 codes: 1 code for recorded media for sound and image, and 2 codes for video games.

Audiovisuals: This subgroup has 2 codes; only 2 types of exposed cinematographic film are included in this subgroup.

3. Creative Industries and Economic Development

Development concerns are in the front burner of most African countries. There is a global consensus that development of the least developed countries should be of global concern and that developed countries should commit resources towards addressing this problem. The world’s attention on development in most of these countries has resulted in financial aid to most of them. The result has been mixed. The majority of Africans live in rural areas, characterized by poverty and subsistence agriculture on which they depend for their livelihood. A greater percentage of Nigerians live under this condition. Despite her oil wealth the greater proportion of Nigerians live in rural and poor urban settlements under poor and subsistence conditions. The challenge of development is therefore great. The urgency for mobilizing the creativity of the Nigerian people for their own emancipation has never been felt as it is today. Reforms based on the neo-liberal policies of the past few decades have had some success but is characterize by poverty and marginalization of the majority of the Nigerian people. Over the decades Nigeria has tried a

number of development strategies. From import substitution industrialization to export promotion efforts have been made to create a sustainable economic growth process.

From a mixed economy led by the state to the current market based, private sector driven economic strategy, policies to privatize and commercialize public enterprises have been put in place. The current regime lends itself more amenable to mobilizing the creative ability of the population. The state is still however important in facilitating such mobilization. Creative industries have a better chance of success in the liberalized environment. As Nigeria tries to diversify her economy and move away from overdependence on oil, creative industries can play a role in this process. They can contribute to the growth of export and help diversification the country's export structure.

Creative industries have emerged as one of the world's most dynamic economic sectors. Developed countries have demonstrated that creative industries can play a major role in economic growth. In the past few decades available data shows that creative industries have facilitated cultural, social and economic development in most developed economies. They have contributed in creating jobs and played important part in promoting trade.

According to UNCTAD figures international trade in creative goods and services reached a level of \$445.2 billion in 2005. This reflects a growth rate during the decade higher than the growth of output. This trade is driven by creative industries in such areas as cultural heritage, the arts, media, creative services and design. China has become the world's leading exporter of creative goods by 2005 as it presses hard to develop and modernize her economy. The expansion of trade has been restricted to developed countries. The share of African countries in this expansion of trade in creative goods and service has been very minimal.

Linking business, culture and technology, the creative economy holds great potentials for developing countries to mobilize and transform untapped creative resources into growth. Most of these countries have demonstrated the existence of creativity which would make this possible. Globalization and connectivity are benefiting the creative industries of developed countries and they can do the same in developing countries that are able to create the enabling environment for its growth. A few developing countries provide evidence for this. India's movies and software

have penetrated the world market. India has shown how creativity in the communications area can enable it to compete effectively with developed countries in that area.

Mexico's TV stations and the Republic of Korea's digital animation products have also made good progress in entering markets around the world. These are success stories from developing countries. However, many developing countries are not yet able to harness their creative capacities for development, due to a combination of external and internal constraints.

The challenge of developing the Nigerian economy at a rate necessary to reduce the level of poverty and liberate the Nigerian people has made attention to all aspect of the economy imperative. The usual focus on modern industries might have to be reexamined as it has become obvious that the peoples' creative ability could lead to value additions to GDP. Nigeria can claim a wide range of creative activities. The manifestation of these could depend on the stage of development. The stage of development determines the nature of the environment for creativity to grow. Development is often associated with changing structure of production. In the process of development manufacturing first increases its share of GDP. This can only happen when the conditions for manufacturing to grow exists. The economy must be able to save and invest. Infrastructure must be in place for manufacturing to be competitive.

The policy environment must be right to motivate investors to invest in manufacturing. When these conditions are not met creative or any other industries would find it difficult to grow. If the conditions are right manufacturing would grow, then holds its own, while services increase at the expense of agriculture and also, at high income levels, at the expense of industry other than manufacturing. It is important where the country's creativity best manifest. In some countries they have made strides in various areas of manufacturing while in others services have been the area of impact. Italy was the top exporter of creative goods among developed countries in 2005. Italy's position was determined by its comparative position in the field of design.

Developed countries are leading in the production and trade of creative goods because they have transformed their economies to higher levels of development. Not only the absolute amount of manufacturing increasing but the share of services is still increasing at the highest per capita income levels yet reached in the world. Production in all sectors continually increases in absolute amount.

In most developed countries, the creative economy is leading economic growth, employment and trade. This is as a result of the transformations that have taken place over a long time.

The condition for such a growth has been established and policies to encourage it have been put in place. Different countries have shown different rate of growth of creative industries and areas of comparative advantage have varied. A study prepared for the European Commission shows that creative economy was in the early 2000 expanding 12% faster than the overall economy. Countries were beginning to encourage creative cities to revitalizing socio-economic growth and generating employment in urban post-industrial areas.

Despite these advances in the creative sectors developing countries are not yet able to harness their creative capacities for development. Africa, for example, accounted for less than 1% of world trade in creative products in 2000-2005. This reflects the low level of creative activities and also the low level of industrial activities. This is clearly a reflection of a combination of domestic policy weakness and obstacles at global level. Domestically, policies are needed to enhance production capacities that could drive the production of exportable creative goods and services. Manufacturing is desirable and desired. There has always been fabrication of agricultural or other raw materials in every country, even in the most primitive days. Developing countries must make all the effort required to move across the threshold of industrialization.

Various countries crossed these thresholds at different point of their history. Different circumstances drove and determined the speed with which they crossed the threshold. At the beginning of the 20th century, manufacturing in the present LDCs was negligible in amount. Probably no LDCs except India, Japan (then an LDC), and Argentina had any appreciable amount. Today Japan has one of the strongest industrial economies in the world. China which was nowhere near reckoning has built a powerful industrial base and a globally competitive economy. Since the 1960s and 1970s the LDCs as a group have been making progress. The progress in Nigeria has been relatively weak. The manufacturing base is still weak and the infrastructure for developing a strong manufacturing base is still lacking. Creative industries would find it difficult to thrive under these circumstances.

At the international level, obstacles include lack of access to markets. Markets of developed countries are not always as open as is claimed for goods from developing countries. A number of factors could be responsible for this but non-competitive business practices have played a role.

In areas such as audiovisual and digital industries limited access is carefully orchestrated by many developed countries. The global market structure for some products has also made it difficult for developing country's good to penetrate such markets. The concentration of marketing channels and distribution networks in a few major markets practically excludes products from developing countries. Constraints in sourcing finance from global financing institutions and international capital, place creative industries in developing countries at a distinct disadvantage in the global market place. Lack of access to relevant technology also undermines the competitiveness of creative products and services from developing countries. Multilateral processes such as the Doha Round under negotiation at the World Trade Organization WTO, the development agenda being shaped at the World Intellectual Property Organization as well as the implementation of the UNESCO Convention on Cultural Diversity all have implications for the creative economy. Developing countries need to pay particular attention to these initiatives and ensure that their interests are taken into account. The weak position of most developing countries in most of these organizations has always resulted in position untenable in their countries.

4. Analytical framework

The role of industries in economic development has long been acknowledged. Various authors have established the connection between the level of investments in industries and economic growth. Creative industries could first be looked at within the context of industrialization. The various industrialization models adopted by various developing countries have yielded different results. We can look at the possibility of developing creative industries within each of those models. Within the globalization context and that of the increasing liberalization of developing economies the viability of export led growth has been a focus in a number of studies. In this context we might want to look at creative industries in a trade development framework. The concerns would be how to develop a creative economy that is globally competitive enough to ensure global market penetration of locally produced creative goods. Examples of MIC that have

promoted exports which included creative goods and have used the strategy as a driver for economic growth provides a framework that could be pursued. At the global developmental level we can look at creative industries with the contending development paradigms. It would be necessary to make the distinction between the creative economy and creative industries or cultural industries (the old idea of core cultural industries). Focus on the creative economy as the context within which creative industries operate and are integrated into the national, regional and global economy is important. Analysis of the creative economy would be necessary to appreciate the potential role of creative assets in driving growth employment and poverty alleviation.

Gap Analysis would be important. There are many constraints and disconnects that persistently undermine industrial development in LDCs. A critical analysis of these constraints and the sources of disarticulation and disconnects is critical for a successful strategy for developing the creative economy and creative industries. A good example in Nigeria is the film industry. The Nigerian movie industry is ranked the third largest in the world. It is said to produce an average of 2000 movies annually with a potential of annual revenue of N522 billion. This industry is a source of employment for thousands of actors, producers, technicians, and other theatre workers and supply chain personnel. Although it is said to have a captive viewing audience of over 200 million across Africa and beyond, its products are not yet up to international film standards.

Nigerian films are low budget produced with technically unsophisticated methods. This low budget has enabled the industry to sell its products at very low prices. Comparing the Nigerian film industry with those of India and the United States, the other two bigger industries, what are the gaps? Observers have noted that producers, directors, actors and other theatre workers do not compare with their counterparts in the other two countries. They need greater industry exposure and training to improve on their products. Quality assurance is said to be low. These are some of the identified gaps that if addressed could facilitate the penetration of Nigerian movies into the global market and make them competitive. The same can be said of other core cultural industries in Nigeria. Quality required in the global market can only be met when producers are conscious of them and develop the skills to meet them. Gap analysis will identify all gaps for each product line and facilitate solutions for them.

Given the research questions we have to begin with value chain analysis. It is important to trace the entire process of value creation of a creative industry. This will ensure that gaps in the process are identified and addressed. Cultural production chain – creator begins with a creative idea and then combined with other inputs to produce a product or service passing through stages until the product or services reaches to consumer/ audience – need to be understood. If we look at the Nigerian film industry we see an extremely high rate of video piracy and informal trade. We find a lack of formal connection to the larger economy despite its size. This reflects a very weak marketing segment of the value chain. Already efforts at developing new distribution and licensing framework are at play. Producers cannot invest more into production if pirates cream off the greater part of the profit from production. The situation today is that most producers market their products directly. They establish channels through which their products are distributed. This has greatly limited their ability to widely circulate their products and have created opening for others to fill in market through pirating.

Industrial organizational analysis would also be necessary. Industry has a definite organizational form. The industrialization process involves a transformation process that has evolved over time and continues to evolve with the rapid changes in the global economy. To talk of creative industries we are assuming certain organizational form which is required to ensure that that form can contribute to the growth process.

We assume some form of manufacturing. Manufacturing is sometimes used by economists to refer to all fabricating of products from primary materials, including those in shops too small to be termed factories. ‘Manufacturing is the fabricating of primary materials into more useful products, with the use of machines rather than merely tools, and machines driven by power rather than the power of human or animal muscles, on a fairly large scale’. The base of our cultural industries in many instances might not fit this description. Many of our cultural products are produced by individuals using simple tools and human power in small shops. Industrialization is the introduction of a considerable amount of manufacturing into a country or region. Do we expect creative industries to introduce manufacturing into the local economy? Industrial organizational analysis is important to enable us understand the nature of creative industries in Nigeria.

5. Data analysis and result of the findings

The study so far has only conducted a test run of the questionnaire that would be administered across the country and amongst stakeholders to help define possibility of whether development of Creative Industries and the Creative Economy can have a positive impact on Nigeria.

The samples were drawn from Abuja and Zaria. The trade covered were basically arts and craft. In Abuja a number of other activities were covered. We need to identify bottlenecks and resolve them to enable this sector of the economy play its expected role. At this stage of the study emphasis was place on discussions with knowledgeable stakeholders from the public and the private sector. Some focused group discussion also informed some of the recommendations. Existing literature was also of importance in some of the conclusion reached this far. It is expected that the validation of these findings and recommendation would be done by the nation wide survey that would flow. What information is being collected? The survey tries to capture basic information that would reveal the potential of promoting a “Creative Nigeria”. Information sort include:

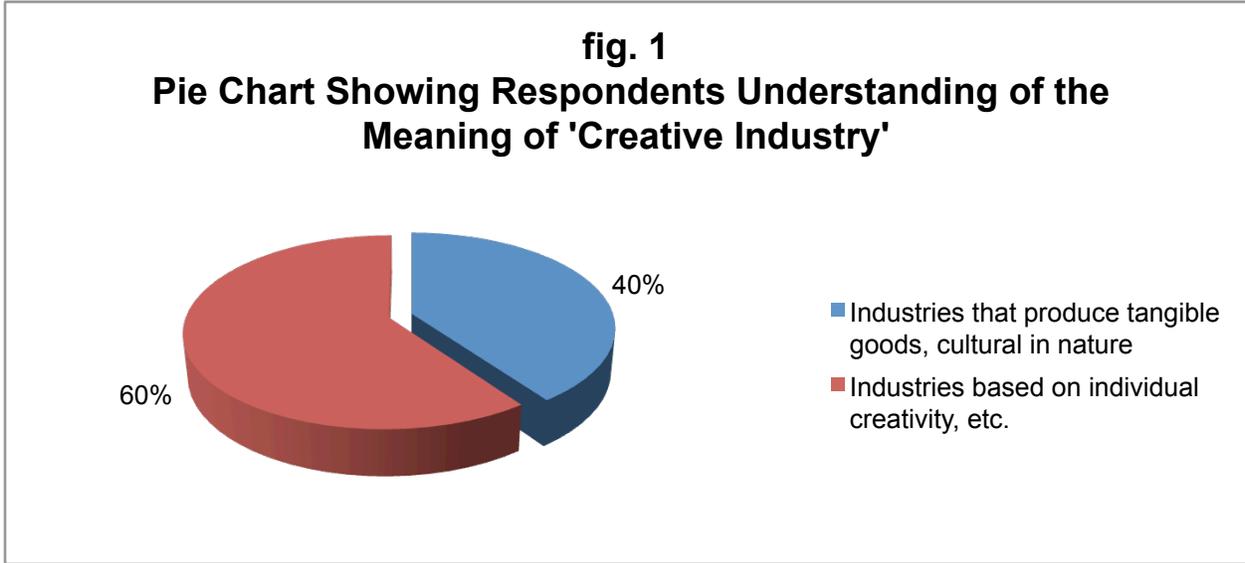
- Perception of actors on creative industries
- Gross value added
- Number of businesses
- Exports
- Total creative employment
- Employment in creative industry firms
- Employment of ‘creatives’ in occupations in other sectors

Findings

The interaction with the various respondents so far suggest that most people were aware and familiar with the core cultural industries and are confident that they could play a major role in reforms that could lead to economic growth and prosperity and poverty alleviation. The general perception is that core cultural activities in Nigeria have been undermined by the modernization of the economy and society. With the increasing modernization and westernization of traditional societies tastes have been changing towards western products and imports. The case of African

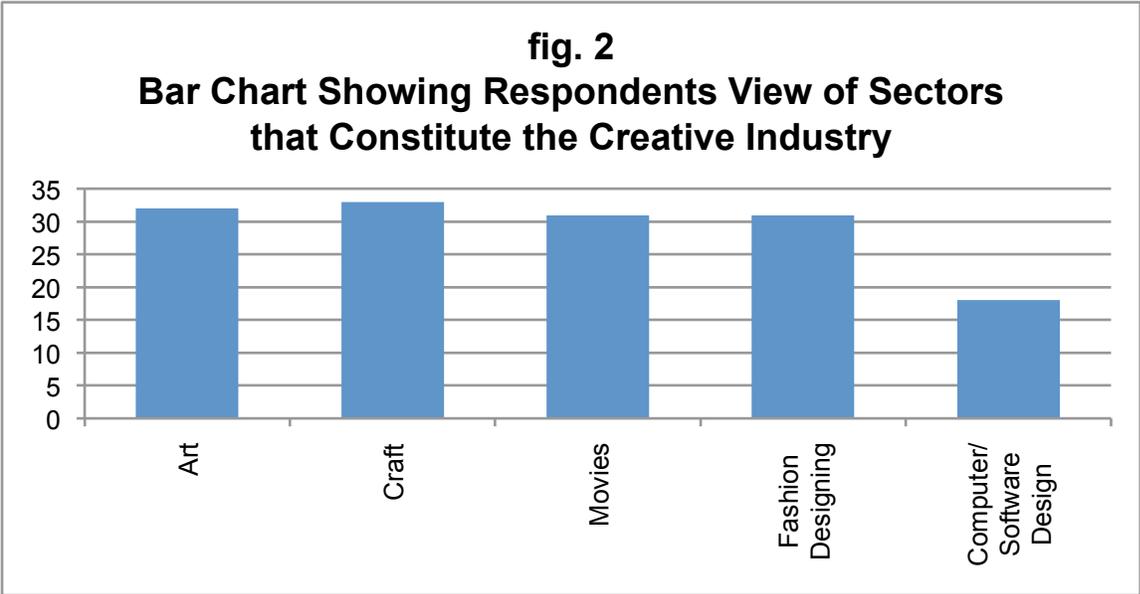
music, arts, textiles were cited as cases where traditional creative activities have been virtually wiped out by more sophisticated imports that respond to changes in taste. The situation was however not considered irreversible. Most respondents recognized that African people are still very cultural and have great respect for their culture and traditions. But the ability to transform cultural goods into marketable commodities is recognized as a major constraint. This transformation is necessary if cultural goods would compete in the global market.

One of the major findings of this study is the weak local market and the lack of market access for cultural goods from the country into developed economies. The income elasticity of these goods is relatively high. With low incomes the demand for them in local markets is weak. Their demand in high income countries could be easily cultivated but for the restrictions they face in many high income countries. The ability of producers of cultural goods to export their products to foreign markets has been constrained by a large number of factors ranging from internal conditions to foreign restrictions. Producers find it almost impossible to penetrate western markets. Except for tourists who patronize some of these items the marketing channels for these goods are rather weak.

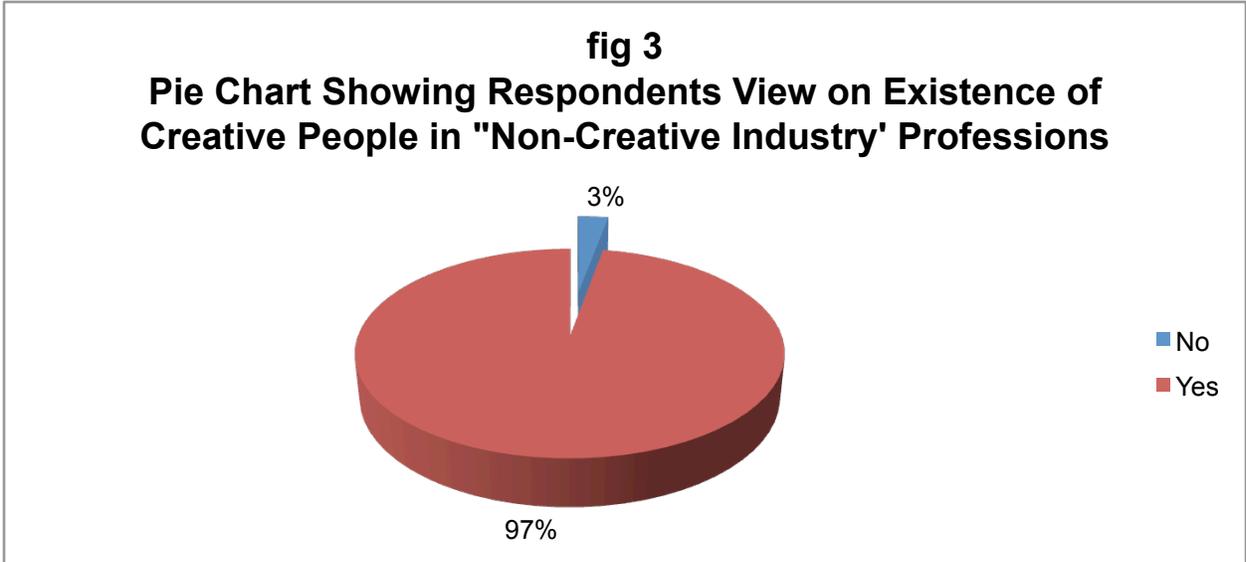


The survey tried to find out if stakeholders have specific perception of what creative industries should cover in Nigeria. Most were able to identify cultural industries and the role it can play in developing the Nigerian economy just as they acknowledge the constraints and challenges to

these industries as movers of growth in Nigeria. Many noted that if cultural industries are promoted they would put to work a large number of workers particularly in the rural areas, who have abandoned these activities due to low demand and poor production conditions. Most of Nigerian traditional industries in this area have been adversely affected by reforms. Of respondents, however 60% suggest that creative industries as a focus of government should be defined as industries based on individual creativity. The balance of 40% suggests that this concern should be restricted to industries that produce tangible goods, cultural in nature. The impression seems to be that if Nigeria gives greater attention to cultural goods it could ground development on the strong foundation of the people’s culture. Many expect that government policies in this area would benefit more Nigerian.



For those who responded to the question as to what specifically constitute creative industry it is clear that Arts and craft, fashion design and movies were easily considered creative. Fig 2 shows the general acknowledgement of these sectors as creative.



An overwhelming percentage of respondent acknowledge that there are creative people in non-creative profession. In discussion they acknowledge that mobilizing these creative talents Nigeria can definitely improve on her growth potentials. The challenge is how policies could target creative talents scattered in various sectors of the economy. Nigerians are perceived to be creative but are said to lack the support and opportunity to transform their creativity.

Table 2 : No of employees engaged by operators (overall)

1 – 10	44.1
31 - 40	2.9
Above 40	52.9
Total	100.0

Table 2 shows the percentage of workers engaged in the operations interviewed. It is interesting that the categories of 1-10 and above 40 contribute the most in terms of employment. This simple presentation reflects the nature of our sample size. The full study would provide better estimates.

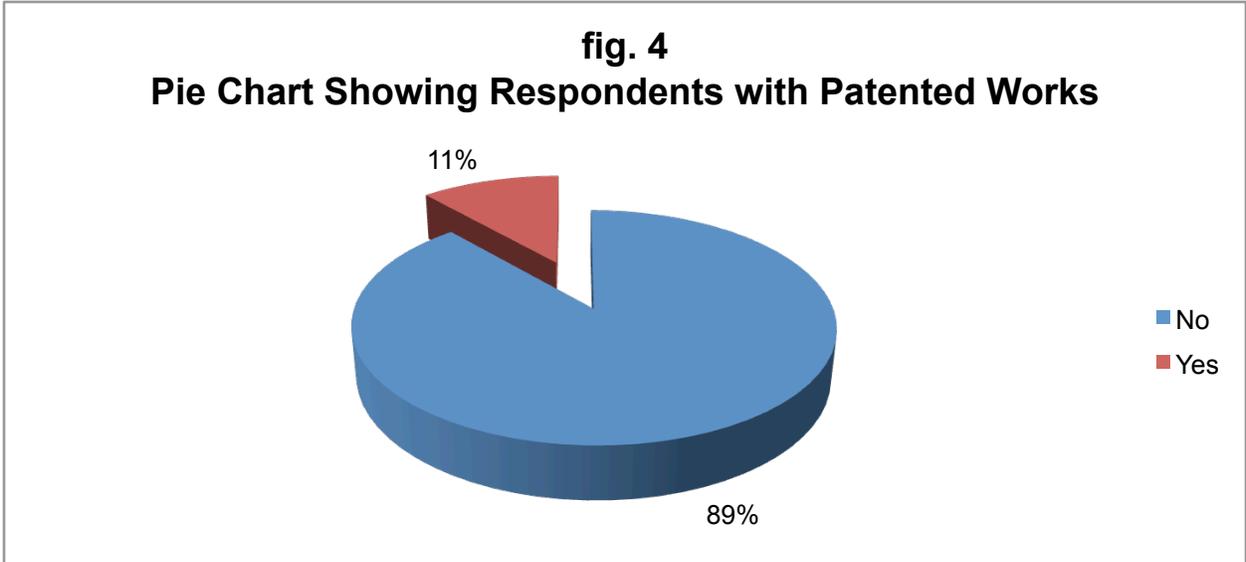


Fig 4 shows that proportion of respondents with patented works. This reflects a major constraint to creative industries in Nigeria. The inability to secure patents to protect creative work is a major constraint. Only 11% of the respondents have patented works.

	%
500K - 1 Mill	63.2
> 1 Mill - 5 Mill	15.8
> 5 Mill - 10 Mill	5.3
Above 20 Mill	15.8
Total	100.0

Table 3 shows the turnover of the respondent. Although respondents were not particularly willing to give information what was collected shows that 63.2% were in the range of 500 thousand to 1million Naira. Only 20% have turnover of above 20 million Naira. Most of the respondents were small and medium scale enterprises. This is important for it demonstrates that efforts at promoting SMEs would have some impact on creative industries in the country

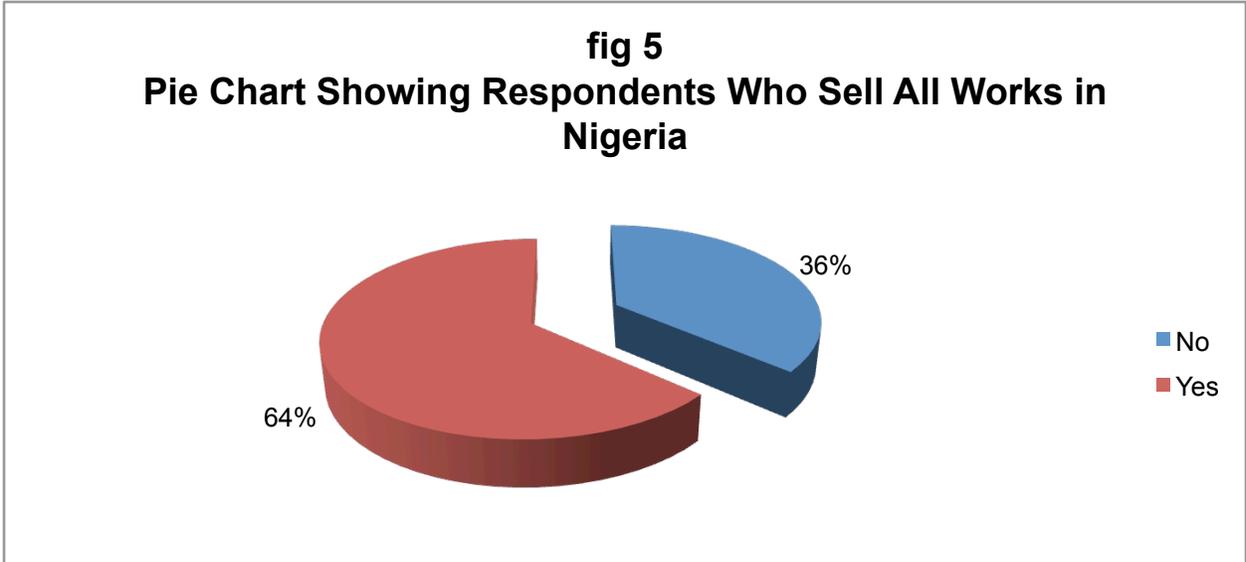


Fig 5 the percentage of respondents who sell all works in Nigeria. As indicated 64% of respondents are not involved in exporting their products

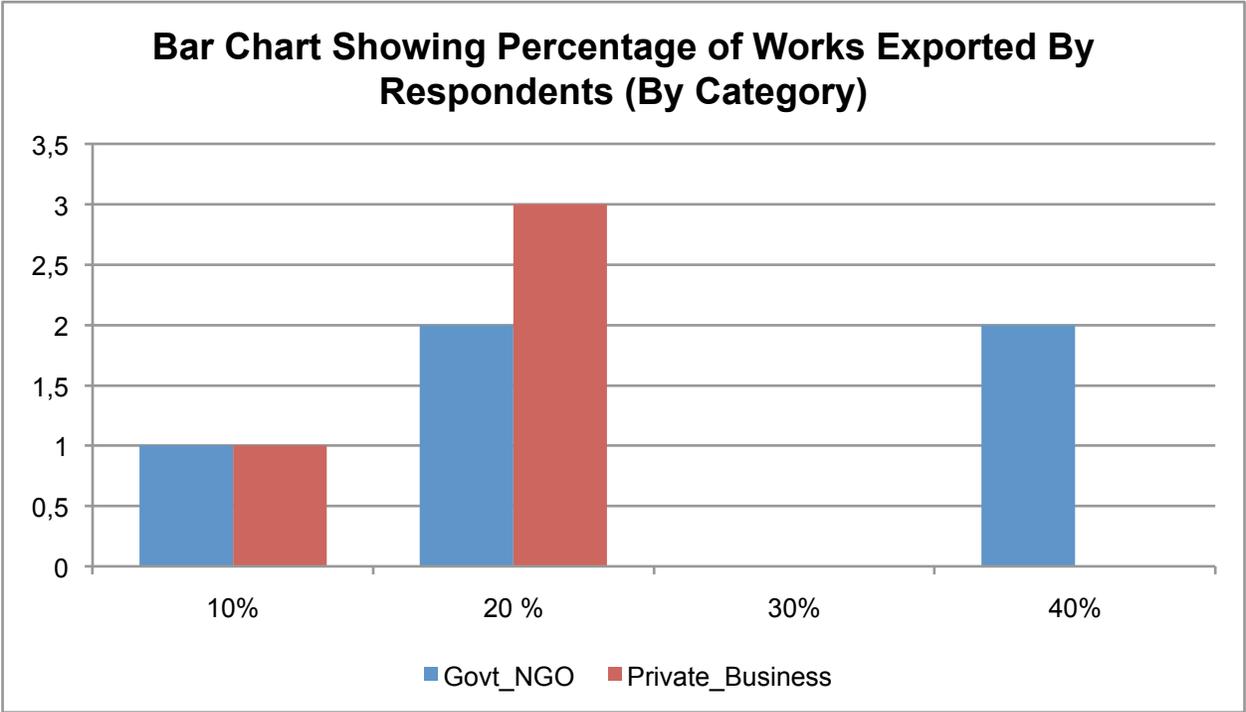


Table 4: Respondents Major Export Destinations

%

West Africa		50.0
Rest of Africa		18.8
Europe		12.5
Others		18.8
Total	1	100.0

From table 4 we see that half of respondents were able to sell in West African markets. Most of the SMEs involved in this sector can only sell at the West African market. Europe accounts for only 12.5% of exports. This demonstrates the point of inability to penetrate European market by creative industries in Nigeria.

Table 5: Respondents views on effectiveness of Distribution networks

Very effective		22.2
Effective		51.9
Not Effective		11.1
Undecided		14.8
Total		100.0

It is interesting that more than half of the respondents feel that the distribution network is effective. When combined with the 22% that feel that the network is very effective the majority of the respondents are happy with the distribution network in Nigeria.

Table 6 : Respondents View on requirements for improved performance

Access to funds	43.2
Access to raw materials	2.7
more craft centres	2.7
improved infrastructure	2.7
improved market structure	2.7
Modern working Tools	2.7
Publicity/promotion of products	2.7
Training opportunities	5.4
Total	100.0

Table 6 shows the responses on the major constraints to their operations. For most respondent funds are the major constraints to their production. This was followed by training and the rest of the factors were rated the same

6. Conclusions and recommendations

Nigeria has the potentials of a creative country and our creative industries can play a major role in driving the economy and addressing the issue of poverty. The creative sectors all over the world are becoming the most vibrant, employing local people that can be assisted to liberate a large number of people.

In Nigeria they could play a greater role in economic growth and poverty alleviation. It is believed that millions of people are employed in creative jobs and that the sector could contribute to far greater growth than it is today. Over the past decade, the creative sector, particularly cultural activities have been growing. Government has to promote creative industries as part of mobilizing new resources for the economic development of the country and of new jobs and income generating opportunities.

The data collected so far is only indicative as responses are still been collated. The results of this study so far suggest that there is a base for a creative economy in Nigeria, which can be enhanced by properly coordinated action by all stakeholders. There is a base for the production

of creative goods and services, which could drive the country's incorporation into the global economy. The result of this study so far points to the direction of providing insight into the way to realise the potential of Creative Industries in Nigeria. It points to the importance of the Creative economy in promoting trade driven development.

This project expects to support evidence based policy reforms and to mobilize stakeholders to take Creative Economy seriously. In Nigeria, although statistics are not available it is estimated that millions of Nigerians are engaged in some form of creative activity that when organized could boost the Creative Economy. At the end of this study we hope to provide some information on creative industries in Nigeria and the challenges facing them. The contribution of these activities to the informal economy is assumed significant and has sustained a large segment of Nigerians in this sector. There is need to encourage decision makers of the economic potential of cultural and creative industries to ensure their integration in strategies of development.

Given the complex and rapidly changing global environment that creative industries have to operate an understanding of the nature and character of creative industries is essential. This will become more apparent with the completion of the study. The context in which cultural goods and services are produced, distributed, and used in Nigeria call for a strategy that builds on already existing frameworks. From our present contacts it is clear that there is need for the improvement of the methods of information flow, organization, management as well as the development of cooperation networks.

Individual respondents seem left on their own although most belong to cooperatives. There need to strengthen partnership and enhancing the role of public and private sectors in the development of a creative economy.

There is need to establish relevant bodies and agencies that would focus primarily on creative industries in Nigeria and assist their production and export. A body that would cut across various ministries and government departments is urgently needed. The ministries of Culture, Tourism, commerce and Industry, Foreign Affairs, Labour and Finance have important roles to play in this process. No one ministry can cater for the enormous tasks of promoting and facilitating the growth of Nigeria's creative economy. The body should acknowledge that core cultural industries are important but its work must cover all forms of creative activities. We should

identify all sectors with creative activities and articulate policies to enhance these activities. The creative economy is not restricted to the cultural sector only. In fact it becoming obvious that with the current globalization process emphasis on cultural goods is fading to the background and technology base, knowledge based activities is becoming more relevant. The role of exports in promoting the creative economy is also becoming very prominent. The ministry and Commerce and Industry must take greater interest in this process. The creative economy can propel industrial growth and diversify and promote non-oil export. This is how creative economy can be a driver of growth, job creator and agent of poverty allocation.

A major challenge today is empowering Nigerian artists and creators and strengthening their capacity for better productivity and quality of products and services. We still need to build capacities of individuals, groups, associations and institutions to achieve concrete results in respective occupations and to use new methods and best practices. There are many weak links in the cultural value chain. The disarticulation of the Nigerian economy and the various disconnects have affected the growth potentials of creative industries. A large part of creative revenues originates from copyrights, licensing, and marketing and distribution. Too often, much of this revenue fails to reach creators in developing countries.

Recommendations

Based on the interactions and literature consulted so far in this study some recommendations could be made. Concerns in Nigeria should be around the creative economy. These concerns should focus on empowering Nigerian to take the ownership and leadership in promoting her creative economy. To be sustainable there must be a national consensus on the need to promote and advance the creativity and ingenuity of the Nigerian people. The core cultural industries are important and would continue to form the focal point of Nigeria's creative economy but the national focus should be in creating a viable creative economy.

Production

Policies should be articulated to create favorable conditions and institutional support for investors in the field of creative industries while protecting Nigerian values and heritage. In this regards there is the need to encourage commercial banks to lend to activities in the cultural and creative industries, encourage linkages between the public and private enterprises for job creation and production of goods and services in the cultural and creative industries. We should

ensure backwards and forward linkages between the cultural and creative industries and the conventional industrial sector, including linkages between rural and urban producers. The country should strengthen the competitiveness of Nigerian cultural goods within the framework of globalization and the liberalization of markets. All efforts to support cultural industries to increase production capacity and improve its quality while preserving the aesthetic originality of products should be made. There is need to enhance the quality and quantity of cultural goods and services and modernizing the technologies and tools used as well as the methods and structures of production and dissemination of cultural goods and services. There is need to establish tools for standardization and mass production. The potentials are there. Government should assist the setting up of development programmes for the transfer of technology and training, in various areas of creative industries, this is particularly important in technologically driven areas. The film sector has been growing rapidly in Nigeria. Nigeria's huge film industry, Nollywood, may have overtaken Hollywood as the world's second largest producer of films, behind India but the quality of Nigerian films is still very poor. Producers have to be protected from piracy. Piracy is threatening to kill the industry in its prime. It is estimated that up to 50% of the industry's profits are currently being lost to Nigeria's endemic piracy. With many creative industries operating without patents and copyrights the loss suffered is often high.

Marketing

Efforts must be made to facilitate global market access for Nigerian creative products and services. In all her negotiations Nigeria should press for agreements on global market access for creative products and services. Government has to assist in opening up new markets for Nigerian cultural goods and services in and outside the country. Government can show example by patronizing creative industries in Nigeria. As part of efforts to greater access to global markets there is need to facilitate access of cultural products and the movement of artists from Nigeria to regional and international markets. Government should actively negotiate these accesses. Government should work to ensure that globalization works for the betterment of Nigeria by bringing together both global and local actors/producers of cultural goods and services. It is important to ensure that international mechanisms help to facilitate the promotion and exhibition of these products for global audiences. Government should assist facilitating access to markets and audience and promote distribution channels to ensure the commercialization of creative

goods and services. A good example will be the promotion of Nollywood the international platforms such as Cannes and Berlin Film Festivals. This could also apply to the other creative sectors and disciplines that have similar international platforms.

Infrastructure

Improve infrastructure for the development of the cultural and creative industries and the working conditions of artists and creators in Nigeria is important and requires aggressive action by government. Government should improve national capacities for protecting, creating, producing, distributing and exhibiting cultural goods. Nigeria would have to strengthen the private and community initiatives of small and medium enterprises. It should also be engaged in building the Capacity of Stakeholders.

Institutional Support

Nigeria needs to strengthen political and administrative institutions to adopt flexible responses to initiatives from the private sector towards the development of cultural and creative industries. The country should facilitate new institutional partnerships between the public sector, private sector and civil society such as within the framework of UNESCO's Global Alliance for Cultural Diversity and AU's NEPAD programme.

Further Government Policy

Government should support in-depth research on organization and structure of firms involved in producing and disseminating cultural goods and services (book publishing, audio-visuals and recording industries, arts and craft, tourism etc). There is need for in-depth studies of the present situation in term of intellectuals, artists, creators, craftsmen and other specialists concerned by qualities and quantities of goods produced, commercialized, exported and imported. Government should strengthen Nigeria's cultural policy to promote and ensure the development of cultural products and new cultural forms and for sustaining the integrity of cultural production as an arena of creativity and social development

Financing

Nigeria should set up a fund for the promotion of creative industries in Nigeria. There is need to study and adapt the mechanisms existing in foreign countries in the field of financing and supporting the creative arts, the production and dissemination of cultural goods and services in the Nigerian context. Create funds to facilitate the mobility of artists, designers, managers, works, goods and services.

Human resource development

Government should give priority to the training of competitive managers for conception and commercialization of cultural products. The country should foster entrepreneurship training and adopt appropriate measures to increase access to private investment and financing opportunities for the development of cultural and creative industries through mechanisms such as Guaranteed Funds, joint ventures and tax incentives.

Intellectual Property Rights and Labels

There is a need to ensure that artistic creations and their creators are protected by the national and international intellectual property organizations with the full backing of national law enforcement establishments. Nigeria should increase the financial and personnel resources to counter piracy at borders. Enter into bilateral agreements to curb piracy such as that between the Performing Musicians Association of Nigeria (PMNA) and the Musician Union of Ghana (MUSIGA).

Nigeria should develop common strategies to fight piracy, illegal copying and in particular the impact of new forms of technology which reduce sound and visual signals to electronic messages via computer transmission technology, cell phone technology and MP3 software. Enhance Nigeria's copyright laws and reinforce all laws that take into account not only rights to exploit the intellectual work but the human rights of the artist.

In summary this work is the first stage of a comprehensive study of Nigeria's creative economy. The aim is to establish the possible impact of creative industries on the Nigeria's economy. The study will try to identify cultural and creative industries and establish their economic potentials

as well as constraints. At this stage it has been possible to address some conceptual issues and to determine that most stakeholders agree that the creative economy should be broadly defined to encompass more than cultural industries or core cultural activities. There is an appreciation that in a dynamic global economy driven by knowledge in science and technology, the creativity of a people in these areas are essential to further their competitiveness. There is also a consensus that Nigerians should own the initiatives and drive, from within society, the process of using the creative economy to promote economic growth and development. Given that creative industries are among the emerging and most dynamic sectors in world trade according to UNCTAD, Nigeria can meet her objective of diversifying her export structure and her economy by promoting creative industries. Indications so far from this study suggest that creative industries can be promoted to drive economic growth and development. It also shows that there are major challenges which must be faced to facilitate the growth of the creative economy.

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Marc Nekaitar is the current Executive Director of Agoralumiere, a Pan-African NGO specializing in the cultural and creative industries development and promotion, applied to the African global development agenda. He specializes in design and management of cultural and creative development projects, project evaluation and training for African and European companies, institutions and NGOs.

Clients have included the local, regional and national institutions in France and in Africa, and various tertiary education institutions for whom he has designed local development programmes based on cultural integration and people's creativity.

He is the editor of the former Agoralumiere Magazine now rebranded as « **Creative Africa Magazine**»

An intercultural activist and practitioner, he works as a producer of African events for organizations such as the Atomium Museum in Brussels where he produced a film programme for the exhibition on African « Africa Fast Forward »

As filmmaker and specialist of African and Diaspora film industry, Marc Nekaitar is currently the European Regional Secretary of the Pan- African Federation of Filmmakers based in Paris, African Task Team Member of the African Chapter of 4th IFACCA World Summit on Art and Culture and Task Team Member of the African Union Annual Forum on Development in Geneva.

As television programme producer and printing magazine editor, Marc Nekaitar is also member of the African Media leadership Initiative in charge of the development of the African Media Industry's global strategy as one of the major creative sectors which can boost development in Africa. Marc Nekaitar also collaborates with African and Pan-African public and private broadcasters.

Marc Nekaitar developed Agoralumiere which is recognized as a reference by professional circles for the African-led and owned film promotion programmes at the Cannes Film Festival. Agoralumiere brought several African countries (South Africa, Nigeria, DRC, Burkina Faso, and others) to Cannes and provided its expertise to the African Film institutions (The Pan-African Film Festival of Ouagadougou – FESPACO, The Pan African Federation of Filmmakers –FEPACI) in accessing the International Film Market. Agoralumiere has also contributed to drawing attention of the international media on the African Young Fashion Designers' potential at the Cannes Festival with its African Fashion Shows.

With his wide range of expertise, Marc Nekaitar designs and produces creative programmes and manages cultural events, develops cultural training courses dedicated to audiovisual programmes. In his social engagement, Marc Nekaitar also works with the youth of African origin in the suburbs of French cities in bringing them tools and programmes to protect and share their native cultural heritage as their contribution to the cultural diversity.

He is currently a Board member and Director of Stakeholder Democracy Network in Nigeria, an NGO working with youth and women in the Nigerian Delta and which also uses culture and creativity as a tool for peace building.



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Josie D'Angelo is a British citizen who is engaged in promoting Africa's interest and development

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Josie D'Angelo ran for the last 12 years, the office of the Chair of the Development Assistance Committee (DAC) in OECD.

She also worked for four years on the INICA project (Initiative for Central Africa) under the umbrella of OECD in the Great Lakes in the DRC. She worked with the local miners to build new perspectives, and mobilised international public and private support the project on the ground and contributed to an important research programme on the cross-border economic et social linkages in the Great Lakes.

Josie D'Angelo is currently the International Director of the Stakeholder Democracy Network, a Non-for- Profit company based in the Nigerian Delta which promotes Peace Building through the empowerment and capacity building of the local population in various areas. The cultural and the creative industries are part of the training programmes for women and youth which are areas covered by the organisation.

Josie D'Angelo works with Agoralumiere on developmental issues such as:

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- . Community development and livelihoods through creative industries.
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Josie D'Angelo is on the advisory board of the Lagos International Film Festival in Nigeria and also a Member of the Millennium Club in Paris, an African think-tank which hosts regular colloquiums and television broadcasting debates on Africa's challenges and a Task Team Member of the African Union Annual Forum on Development in Geneva.

Nota: The presentation of our delivery partners and services providers are on their respective research reports.

- . Avril JOFFE from CAJ
- . Professor Mike KWANASHIE and his Nigeria research team members
- . Professor Cyril MUSILA and his DRC research team members

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