



UNDERSTANDING CULTURAL AND CREATIVE INDUSTRIES AND DESIGNING APPROACHES FOR ITS DEVELOPMENT

A Guide

Published by

giz Deutsche Gesellschaft
für Internationale
Zusammenarbeit (GIZ) GmbH

TABLE OF CONTENTS

Abbreviations	4
List of Figures and Tables	5
1. Introduction	6
2. The Importance of Cultural & Creative Industries for Countries' Development	9
2.1 The CCI – Its Contribution to Sustainable Development Goals	9
2.2 Importance for Economic, Environmental and Socio-cultural Development	15
2.2.1 Economic Development for more Innovation, Income and Jobs	16
2.2.2 Environmental Development for Behaviour Change & Climate Change Mitigation	18
2.2.3 Socio-cultural Development for Crisis Prevention, Gender Equality and Breaking Colonial Continuities	19
3. Analysing the CCI and Developing Interventions	22
3.1 Levels for Approaching the CCI	23
3.1.1 'Cultural Industry' vs. 'Creative Industry'	23
3.1.2 Defining the CCI	25
3.1.3 CCI Value Chains	34
3.2 Tools and Approaches to Analysing the CCI	37
3.2.1 Ecosystem Mapping	38
3.2.2 Value Chain Analysis	41
3.2.3 Gender Analysis	45
3.2.4 ELMA-Study	50
4. Partner Management	53
4.1 Identification of Relevant Partners	53
4.2 Successful Examples of Partnerships in the CCI	57
5. Approaches to Strengthen the CCI	61
5.1 Scope and Introduction	61
5.2 Global Approaches and Networks	63
5.2.1 Building Global Advocacy Networks for the CCI	63
5.3 Approaches on the Macro-Level	65
5.3.1 Using Statistical Data of the CCI for Informed Policy-Making	65
5.4 Approaches on the Meso-Level	69
5.4.1 Strengthening Intermediaries of the CCI	69

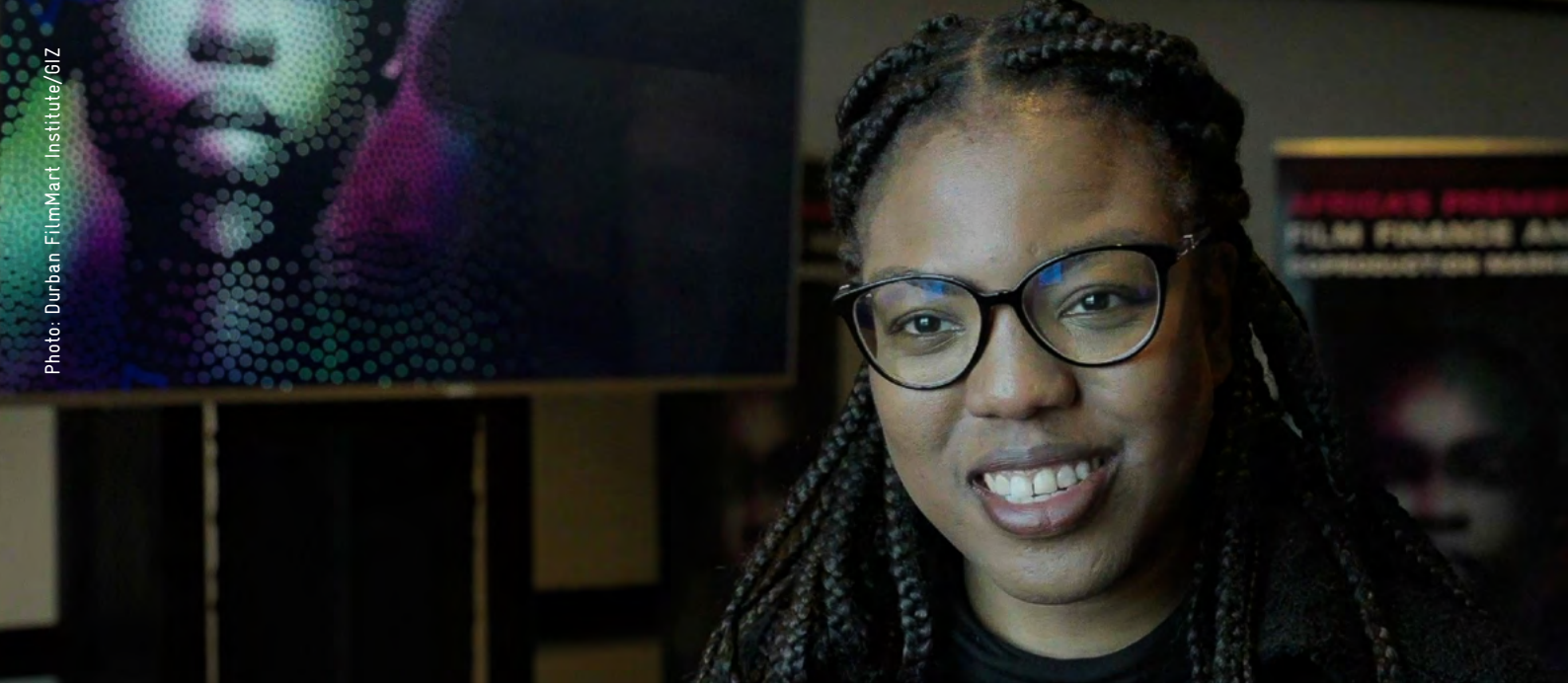
5.4.2	Strengthening Business Models and Services of Interest Groups and Associations in the CCI	73
5.4.3	Improving Access to Finance through Intermediaries	77
5.4.4	Building Multidisciplinary Incubators for CCI Professionals, Practitioners and Businesses	81
5.4.5	Setting-up of Advocacy Groups through the Initiation of Networking Events and Public-Private Dialogues	85
5.4.6	Building Safe Community Spaces for CCI Professionals, Practitioners and Businesses	88
5.4.7	Strengthening Capacities of Associations and Building Umbrella Organisations	91
5.5	Approaches on the Micro-Level	94
5.5.1	Integrating Soft Skills in CCI Technical Professions	94
5.5.2	Integrating Job Placement Opportunities in Training Interventions	97
5.5.3	Developing Awareness Campaigns on Issues Relevant to the CCI	100
5.5.4	Strengthening Digital Skills for the Design Sector	103
6.	Monitoring & Evaluation	107
6.1	Monitoring System	107
6.2	Monitoring and Evaluation Results of the Global Project CCI	110
7.	Prospects	114
	Footnotes	119
	References	121

ABBREVIATIONS

BMZ	Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung Federal Ministry for Economic Cooperation and Development
CCI	Cultural and Creative Industries
CD	Capacity Development
CEA	Creative Economy Alliance
CEN	Creative Economy Network
CMO	Collective Management Organisation
DC	Development Cooperation
DFMI	Durban Filmmart Institute
ELMA	Employment and Labour Market Analysis
EMV	Economic Modernisation Vision
EU	European Union
FISA	Film Industry Satellite Account
GDP	Gross Domestic Product
GIZ	Gesellschaft für Internationale Zusammenarbeit GmbH
GVA	Gross Value Added
ICT	Information and Communication Technology
IFC	International Finance Corporation
IP	Intellectual Property
LGBTQI	Lesbian, Gay, Bi, Trans, Queer and Intersex
M&E	Monitoring & Evaluation
MENA	Middle East and North Africa
NFT	Non-fungible Token
OECD	Organisation for Economic Cooperation and Development
PPD	Public-Private Dialogues
SACO	South African Cultural Observatory
SDG	Sustainable Development Goals
SETA	Sector Education and Training Authority
SIDA	Swedish International Development Cooperation
UNCTAD	United Nations Conference on Trade and Development
UNESCO	United Nations Educational, Scientific and Cultural Organisation
USAID	United States Agency for International Development
VFX	Visual Effects
WB	World Bank
WIPO	World Intellectual Property Organisation

LIST OF FIGURES AND TABLES

- Figure 1** Economic Effects of the CCI (Source: UNESCO 2022)
- Figure 2** Mean percentage of people in cultural employment, as a percentage of total employment (Source: UNESCO 2022)
- Figure 3** Cultural Industry Vs. Creative Industry (Source: Own Figure)
- Figure 4** Common Characteristics of CCI (Source: Own Figure)
- Figure 5** Sub-sectors of the CCI (Source: BMWK 2020)
- Figure 6** Domains of the CCI (Source: UNESCO 2009)
- Figure 7** UNCTAD Creative Industries Model (Source: UNCTAD 2004)
- Figure 8** David Throsby Model (Source: David Throsby 2008)
- Figure 9** Stylised Creative Value Chain Model (Source: European Commission 2017)
- Figure 10** The Three Elements of the Entrepreneurial Ecosystem (Source: GIZ 2018)
- Figure 11** Stylised Value Chain - Music (Source: EU 2017)
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- Table 1** Economic Effect of the CCI (Source: Fraunhofer ISI 2012)
- Table 2** WIPO Copyright Model (Source: WIPO 2003)



1. INTRODUCTION

The Cultural and Creative Industries (‘the CCI’^[1]) are an important yet underrated sector in almost every economy worldwide; their combined outputs contributing to economic, environmental, and socio-cultural progress. The CCI encompasses a diverse range of sub-sectors and value chains, including but not limited to design, fashion, audio-visual, cultural heritage, video games, architecture, and the performing arts. These sub-sectors demonstrate a robust innovation capacity and maintain close connections to other sectors of the economy. This connection is facilitated through creativity, design, and the adoption of new organisational processes and business models. Yet, the CCI is inadequately considered in the initiatives of international development cooperation (DC) organisations. Despite the existence of several international projects seeking to strengthen the CCI in countries of the Global South, UNESCO data shows that funding allocated to the CCI by international DC organisations is diminishing. Numerous gaps continue to persist within the sector, necessitating interventions that require prompt attention and resolution.

Engaging in the CCI as international DC organisation involves navigating a dynamic and multifaceted landscape. This guide provides a comprehensive framework to assist organisations in understanding and analysing the CCI and in planning, implementing, and evaluating initiatives that contribute to the sustainable development of the CCI. It aims to assist international DC organisations to collaborate effectively with creative communities worldwide

^[1] Note on the text: for ease of reading, whilst ‘Cultural and Creative Industries’ recognises the plurality of sub-sectors it contains, ‘the CCI’ is treated herein as a singular grammatical and socio-economic entity.

and implement projects successfully. This guide recognises the intrinsic value of culture and creativity in fostering economic growth, cultural expression, and social inclusion. Furthermore, it acknowledges these factors in the context of their contribution to the goals of many international DC organisations, such as: job and income generation, innovation promotion, climate change, gender equality, just transition, and disrupting postcolonial continuities. The guide has been formulated within the framework of the Global Project CCI, executed by the Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH in collaboration with the Goethe-Institut, commissioned by the Federal Ministry for Economic Cooperation and Development (BMZ).

The second chapter of this guide outlines the CCI and its importance in countries' economies; for countries' development; and in the context of international development cooperation. Key facts about the CCI are summarised, emphasising its contributions to concepts such as Job and Income Generation, Just Transition, Climate Change, Gender Equality, and the Discontinuation of Postcolonial Continuities, among others, within the framework of international development cooperation. In consideration of this, an overview is provided of the current involvement of international DC organisations in the sector, along with an examination of persisting challenges that still warrant attention. Following this, a comprehensive analysis is presented detailing the economic, environmental, and socio-cultural impact of the CCI, aiming to offer an in-depth understanding of the sector's potentials for further engagement of international DC organisations.

Engaging in the CCI involves navigating a dynamic and multifaceted landscape that provides opportunities for engagement along various verticals. Against this background, in chapter three, particular attention is directed towards understanding the implications of the different definitions and classifications for international DC organisations and their engagement into the sector. Subsequently, various tools that help to map, understand and develop interventions for the CCI, as well as the results of their practical application in the context of the Global Project CCI are presented.

The stakeholder and partner landscape within the CCI is diverse, thanks to its extensive reach across various sectors and value chains. The CCI not only contributes to learning, innovation, and organisational change within its domain, but also influences other economic sectors. Effectively navigating this diverse partner landscape demands sensitivity and awareness of distinct interests and potential conflicts. Chapter four delves into the unique characteristics and considerations of the CCI compared to other sectors, providing a practical guide on identifying partners in this dynamic field. Furthermore, the multifaceted nature of the sector is illustrated through examples of successful partnerships within the CCI promoted by the Global Project CCI.

To offer international DC organisations insights into solutions for enhancing the CCI, chapter five outlines various successful approaches. This section serves as a reference for development practitioners seeking guidance implementing respective initiatives. While these approaches have been categorised from a global, macro, meso, and micro perspective, they can also be selected based on a sub-sector-oriented approach or the intended impact, such as job and income generation, digitalisation, private sector development, education, among others.

The CCI exerts a profound influence on the economic, environmental, and socio-cultural development of countries. Despite its significant impact, measuring these effects in existing initiatives remains a substantial challenge, primarily due to the multifaceted nature of the sector. This challenge becomes particularly pronounced for international DC organisations engaged in regional or global projects with a focus on job and income generation. The monitoring of data encounters difficulties stemming from inconsistent and varied definitions and classifications within the CCI, as well as the diverse job profiles falling under its umbrella. Chapter six addresses these challenges, offering development practitioners insights on how to effectively monitor and evaluate projects with a specific focus on job and income generation within the CCI.

The concluding chapter of this guide presents propositions for deeper involvement in the sector. These ideas are open for further development by international DC organisations, having yet to undergo practical testing. They are categorised by their scope of engagement: distinguishing between initiatives with an international focus, such as enhancing statistical data for the CCI, and endeavours at the national level, such as the establishment of additional funding opportunities.





2. THE IMPORTANCE OF CULTURAL & CREATIVE INDUSTRIES FOR COUNTRIES' DEVELOPMENT

2.1 THE CCI – ITS CONTRIBUTION TO SUSTAINABLE DEVELOPMENT GOALS

A global engine for job creation and income generation

The CCI is one of the fastest growing sectors. On a global level, it currently accounts for 3.1 % or \$2250 billion USD of gross domestic product (GDP) and 6.2% of total employment.^[2] In most member countries of the Organisation for Economic Cooperation and Development (OECD), the growth in employment in the CCI exceeded the growth in overall employment (13.4% compared to 9.1%).^[3] By 2030, the sector is expected to account for 10% of global GDP, according to pre-pandemic forecasts.^[4]

According to UNESCO almost 50 million people work in the CCI^[5] and its various sub-sectors worldwide; more than three times as many as in the global automotive industry, which employs roughly 14 million workers.^[6] Nearly half of those working in the CCI are women.^[7] In the decade prior to the pandemic, the number of businesses operating in the CCI grew more than the number of enterprises in the rest of the business economy (18% vs 12%) in the OECD countries. In 2018, approximately 7% of all businesses in the OECD countries were from the sector.^[8]



Figure 1
Economic Effects of the CCI
(Source: UNESCO 2022)

The CCI is also growing in emerging economies, including in countries in which the GIZ/Goethe-Institut Global Project CCI is active: these include South Africa, Senegal, Kenya, Lebanon, Iraq, and Jordan. In 2015, Africa and the Middle East generated \$58 billion USD in sales (3% of the total) and 2.4 million jobs (8% of total CCI jobs). The CCI covered 1.1% of regional GDP in the Middle East and Africa.^[9] In South Africa, the contribution of the CCI to the GDP stood at 2.97% in 2020.^[10] A recent study conducted in 2021 by UNESCO, focusing on the film and audiovisual industry in Africa, has projected the potential to generate annual revenues of \$20 billion USD and create over 20 million jobs through additional investment.^[11]

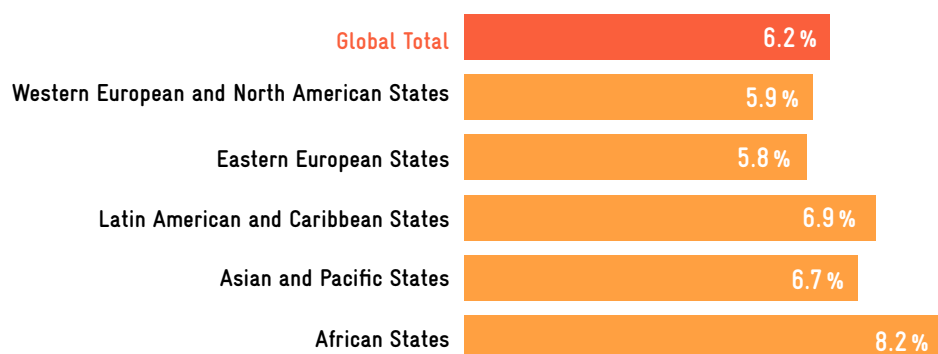


Figure 2
Mean percentage of people in cultural employment, as a percentage of total employment (Source: UNESCO 2022)

Looking closer at Africa, the CCI is a vibrant and diverse landscape that reflects the continent's rich cultural heritage, innovative spirit, and dynamic artistic expressions. Comprising a kaleidoscope of disciplines such as visual arts, music, literature, fashion, film, and design, the African creative industries are gaining global recognition for their unique contributions. Various genres of African music have played a pivotal role in shaping popular music in North and South America, as well as Europe; meanwhile, African societies' cultural wealth is increasingly emerging to seize the opportunities presented by advancements in new technologies and commercial markets. In particular, employment growth in the CCI across Africa is propelled by the film sub-sector. Notable successes include the ascent of Nollywood, the Nigerian film industry, which is estimated to provide direct employment for 300,000 individuals.^[12] The CCI thus has a significant economic impact, aligning with the mandates of many international DC organisations for job creation and income generation.

The potential of the CCI in addressing some of the world's pressing challenges

Beyond this economic impact, the CCI has far-reaching effects on various aspects of society and environment, correlating with goals and concepts of international DC organisations. Some being summarised here and further elaborated in [chapter 2.2. Importance for Economic, Environmental and Socio-cultural Development](#):

1. CCI and Digital Transformation

The CCI is significantly impacted by the ongoing digital transformation. Digitalisation has brought about a paradigm shift in the way cultural and creative products are produced, distributed, and consumed. With a strong affinity for the use of new and existing technologies, the CCI is not only impacted by the digital change – it also contributes to the wider technological revolution and provides new impetus for other sectors of the economy. The use of digital technologies is giving rise to both new CCI sub-sectors (e.g., animation, VR/AR, gaming), and non-digital CCI sub-sectors (e.g., fashion, music) capitalise on digital sales channels. Due to new digital and technological developments, the composition of exported creative goods and services has changed considerably over the last two decades. In particular, exports of audio media and video games have increased.^[13] At the same time, digital creative services were more resilient than other service sectors during the COVID-19 pandemic.^[14]

2. CCI and Gender Equality & Social Inclusion

In addition to the economic potential, the sector has great potential for gender equality and improved participation of marginalised population groups. The CCI is characterised by high dynamism, low barriers to market entry and progressive-liberal milieus. This offers social groups that are structurally disadvantaged in other economic sectors opportunities for economic participation. Furthermore, creative productions often serve as a powerful medium for social commentary and advocacy. Artists use their work to address social issues, advocate for change, and bring attention to pressing societal challenges that relate to inequality and social inclusion. In addition, the CCI has emancipatory potential by creating identity and bringing marginalised perspectives into the mainstream.

3. CCI and Colonial Continuities

The CCI can contribute to overcoming colonial continuities through creative and cultural exchange, and cooperation on an equal footing between the Global North and South. Colonial histories have shaped dominant narratives and representations within the CCI. The legacies of colonialism often influence how cultures, identities, and histories are portrayed in creative works. Addressing colonial continuities involves challenging stereotypes and fostering diverse, authentic narratives. Historical colonial relationships continue to influence international collaborations within the CCI. Efforts to foster equitable partnerships involve moving away from colonial dynamics and ensuring that collaborative initiatives respect the autonomy and agency of all parties involved.

4. CCI and Just Transition to a Green Economy

Just Transition recognises the social and cultural dimensions of economic change. Thus, the concept of 'Just Transition' intersects with the CCI in various ways. Not only do creative and cultural products and services affect economic transformation; they also play a role in wider socio-cultural and environmental change.

5. CCI and Climate Change

Cultural and creative professionals, practitioners and entrepreneurs often respond to climate change through their work: raising awareness, inspiring action, and exploring the relationship between culture and the environment. Cultural productions, including literature, visual arts, and performances, can contribute to climate change discourse and advocacy. In addition, the emergence of green creative industries, such as eco-friendly fashion and sustainable and circular design, present economic opportunities within the CCI that align with climate-conscious concepts and influence consumer preferences. The sector thus has a potential to positively raise awareness on the impacts of climate change.

6. CCI and Education

The CCI also plays an important role in education. It can inspire and engage students by providing them with opportunities to explore their creativity, critical thinking, and problem-solving skills. Incorporating creative elements into educational curricula can enhance learning outcomes and foster innovation. Additionally, exposure to the CCI can broaden students' perspectives, encourage cultural appreciation, and promote social inclusion.

Importance of CCI in international development cooperation

Strengthening the CCI is therefore important in the context of international development cooperation and a number of bilateral and multilateral organisations are engaged in the sector. Organisations such as UNESCO, UNCTAD, OECD and the World Bank (WB)/International Finance Corporation (IFC) recognise the potential of the CCI and have launched position papers and joint projects in recent years. For instance, the WB, jointly with GIZ, is establishing a 'Creative Economy Alliance' (CEA) to promote diversity and youth employment within the CCI and to provide information and foster exchange among CCI practitioners and professionals. IFC has also recently started to invest in the creative market. To date, IFC has made a handful of investments, mobilising approximately \$114 million USD of its own funds as well as private funds for a total commitment to the industry of \$500 million USD.^[15] Most importantly, disruptive technologies have turned the CCI in many emerging markets into an investable sector for the first time. The European Union (EU) also funds several programmes to promote the CCI in the Global South, which are being implemented by UNESCO.^[16]

Although new initiatives are emerging, according to UNESCO data, international development cooperation funding for the CCI has declined, with the share for CCI support in 2018 being one third of that available before the 2008 global financial crisis and expected to decrease further due to recessions related to multiple crisis. Overall, only 0.23% of development aid was allocated to the CCI in 2018.^[17] Additionally, the CCI is often not acknowledged in private sector development programmes and receives little attention in the appraisal of new international development cooperation initiatives. There is a lack of coherent data and un-

derstanding of the actual economic, environmental and socio-cultural impact of the sector: a lack of systematic evaluation and inadequate management of existing evaluation reports prevent international DC organisations from using existing knowledge for the development of new evidence-based programmes.

Persistent challenges in the CCI

While development programmes and some of the international DC organisations address some of the sector's shortcomings, there is room for further engagement given the potential and the challenges of the sector. The CCI is predominantly made up of micro-enterprises and freelancers. Because of their size and lack of tangible collateral, it is often difficult for creative businesses to access finance. This lack of funding avenues also contributes to creatives' limited access to regional and international markets, as it requires arduous and costly business activities. In recent years, global trade has shown no signs of opening up to cultural services and goods from developing countries. The lack of aid for trade (such as support and funding programmes for internationalisation) contributes to these imbalances.^[18]

Cultural and creative professionals are often self-employed and frequently combine permanent employment with project work. Unstable contracts, low wages and global crises such as the COVID-19 pandemic contribute to income volatility and limited access to social protection, often making employment in the CCI more precarious than in other sectors.^[19] The global digital transformation threatens to further accelerate this development; new business models such as the online platform economy have raised questions about the fair remuneration of cultural and creative professionals and has led to lower wages and further copyrights infringements.^[20] However, as described above, the digitalisation of the CCI is also unlocking new opportunities for cultural and creative professionals, practitioners and businesses and increasing the pressure to follow suit. In order to be competitive, cultural and creative entrepreneurs must switch to hybrid business models. The more diverse the economic models within a cultural and creative sector, the more diverse the sources of revenue. Once hybridisation is coupled with digitalised sectors, distribution costs can be reduced, and more customers can be reached. However, disparities in access to digital tools, infrastructure and skills need to be addressed to fully capitalise on the potential of digitalisation across the CCI.^[21]

At the meso level, business support organisations such as incubators, accelerators, associations, and festivals, can better align their services and programmes to the CCI to overcome challenges in terms of adapting business models and skills by offering tailored support that takes into account the different business model and growth trajectories.^[22] They especially need to leverage and open their networks to creative businesses as these are essential to improve their opportunities to access shared knowledge and funding.

At a political level, state actors still lack awareness of the economic, environmental and socio-cultural impact of the sector. According to UNESCO, only 13 % of voluntary national reviews of progress in implementing the 2030 Agenda recognise the contribution of the CCI to sustainable development.^[23] Another challenge remains access to data for policy-making. This is mainly due to the informality of the sector. The CCI encapsulates a diverse range of sub-sectors. As there are currently no standardised definitions or frameworks, particularly as a basis for data collection, different data is collected in different country contexts, which in some cases does not allow for comparability. Additionally, as for many other dimensions of the economy, national statistical offices in many countries lack capacity and possibly sensitivity to collect disaggregated data. Underscoring these analytical barriers, there is still a gap in the laws, support measures and funding programmes for cultural and creative professionals, practitioners and entrepreneurs. For instance, the lack of the existence or enforcement of copyright laws restricts the revenues of cultural and creative professionals, practitioners and companies and slows their growth and ability to create jobs.

Overall, the CCI in the Global South remains poorly structured and cultural goods are largely supplied through the informal economy. Moreover, the concept of ‘culture’ is frequently detached from its economic aspects: in Francophone Africa people commonly participate in festivals, performances, and engage in theatre without a direct economic exchange. Artists often depend on alternative financial sources, such as sponsorships, to sustain their livelihoods. This cultural approach encourages the unauthorised reproduction of music, video recordings, and other forms of art, leading to widespread disregard for notions of intellectual property (IP) rights.^[24]

As a result, the potential of the CCI to contribute to sustainable development within countries of the Global South remains largely untapped. Disadvantages such as poor infrastructure, small local markets and the lack of training and technical facilities must be overcome to further foster the sector and can be addressed by international DC organisations.

Given the potential of the CCI for development in partner countries, the following chapter will explore in detail the CCI’s impact on economic, environmental and social development, which will provide evidence for international DC organisations to engage with the sector.

2.2 IMPORTANCE FOR ECONOMIC, ENVIRONMENTAL AND SOCIO-CULTURAL DEVELOPMENT

Strengthening the CCI is linked to a number of areas that have economic, environmental, socio-cultural impacts. The CCI is a job engine, and cultural and creative professionals are drivers of innovation, within and beyond the CCI, through spillover and cross-innovation. The CCI also has an impact on environmental aspects by offering new solutions to environmental problems, prototyping solutions together with civil society and economic actors and raising awareness of environmental risks, thus contributing to behavioural changes. However, practitioners and organisations within the CCI face the same demands as other industries to transform themselves in an ecological and sustainable way. Therefore, creative institutions, companies and professionals need to acquire a wide range of skills.

Alongside its economic impacts, the CCI functions as a forum for cultural participation; a significant factor for social cohesion and resilience of societies in times of crisis. Cultural participation is a driver of social change: in recent history, societal challenges such as climate change, gender-based violence and various other causes have been reframed within popular discourse. Embracing new perspectives and committing to authentic representation in creative and cultural areas thus contributes to resilience, skills development and pro-social behaviour. Cultural and creative products and services convey values, drive value change and can transform societies. For example, they promote critical thinking in social discourses, strengthen democratic values and thus contribute to crisis prevention.

The CCI also has an impact on new models for urban development. Strengthening the CCI and expanding offerings of the CCI makes cities and regions more attractive places to work, live and visit, which in turn promotes investment and attracts talent. The promotion of the CCI is therefore also an instrument for regional development. In some countries regional decision-makers are pioneering an alternative approach to cultural and creative practitioners, professionals and businesses; shifting their policies from direct, limited support to policies aimed at developing ‘creative milieus’ or ‘cultural districts’.^[25, 26] As governments rethink their growth models, culturally informed regeneration and development strategies can support the transition to more equitable and inclusive growth.^[27]

In the following chapters, the importance of the CCI for economic, environmental and socio-cultural development is elaborated in detail.

2.2.1 ECONOMIC DEVELOPMENT FOR MORE INNOVATION, INCOME AND JOBS

The CCI – a job and growth engine

First and foremost, supporting the CCI has positive economic effects. As highlighted, the CCI contributes to 3.1 % of the global GDP and creates 6.2 % of the global employment.^[28] It is anticipated that by 2030, the CCI will contribute to 10 % of the global GDP.^[29]

Creative skills are also needed in other sectors of the economy to increase competitiveness and innovation. Globally, 40 % of cultural and creative job profiles are found outside the CCI, e.g., industrial designer.^[30] A study with focus on the UK found that companies with twice the average proportion of hires that come from the CCI (e.g., 6 % rather than 3 %), are 9 % more likely to produce product innovations and 18 % more likely to produce novel product innovations.^[31] A study by the OECD found that in OECD countries cultural and creative practitioners and professionals are more highly educated and skilled than the average employee.^[32]

The economic effects of the CCI are summarised below:

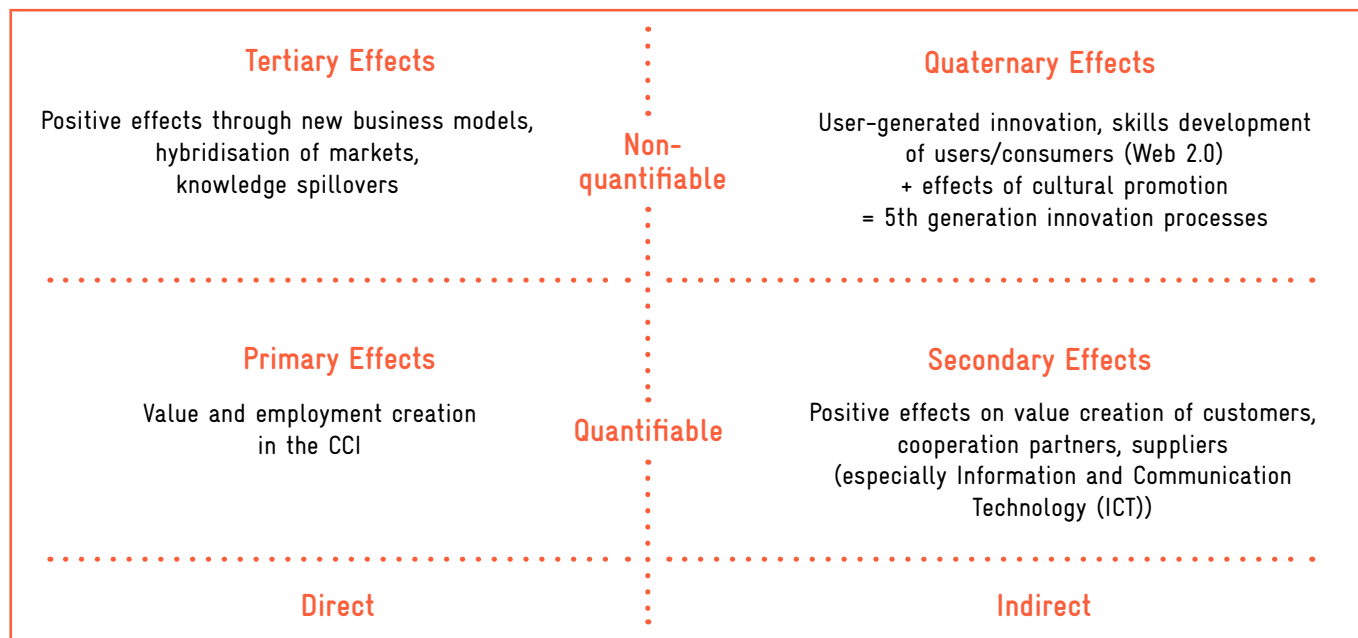


Table 1
Economic Effect of the CCI
(Source: Fraunhofer ISI 2012)

A driver for cross-sectoral innovation

The CCI is a driver of innovation and has spillover effects on other sectors in terms of knowledge, products and networks:

- **Knowledge spillovers** are innovations developed by creative actors that are transferred to firms or the society without the originators being directly rewarded. These knowledge spillovers can, for instance, have an effect on organisational and management structures, increase visibility, tolerance and exchange between interest groups (including changing attitudes through cultural participation and openness), and foster employability and skills development.
- **Product spillovers** relate to the vertical value chain and horizontal cross-sectoral benefits for the economy and society, in terms of productivity and innovation.
- **Network spillovers** see the effects on the economy and society caused by the presence of the CCI. These can relate to urban development or the development of social cohesion, the formation of interest groups and integration, but also to benefits that can only be generated in company networks.^[33]

Research conducted by Frontier Economics, focusing on the United Kingdom, also revealed that companies across the wider economy that procure twice the average volume from the CCI demonstrate a 10% higher likelihood of producing product innovations, and a 15% higher likelihood of generating novel product innovations.^[34] While the presence of the CCI is considered a soft location factor at the local level and creates an environment for innovation, at the macro level the connection between the CCI and other industries could be further strengthened for overall economic benefit. The spillover effects are not yet sufficiently recognised and supported by policy-makers, in particular in the countries of the Global South. There is scope for international DC organisations to work with policy-makers to encourage linkages between the CCI and wider firms to precipitate innovation spillovers. Innovation vouchers, a proven mechanism for promoting collaboration and spillover effects in the past, represent one such example.^[35]

New hybrid and digital business models are emerging

Finally, the global digital transformation drive has positively affected the economic standing of the CCI. It has contributed to new forms of collaboration and business models that benefit the sector's various branches and have spillover effects on other sectors. The pandemic has further fuelled this development and has accelerated the use of digital tools, digital dissemination of

products, and the revision of revenue models and existing business models. As highlighted above, the key to fully taking advantage of the online movement in the future will be to eliminate inequalities in access to digital tools, infrastructure and skills.^[36]

2.2.2 ENVIRONMENTAL DEVELOPMENT FOR BEHAVIOUR CHANGE & CLIMATE CHANGE MITIGATION

The role of the CCI in terms of climate protection and environmental sustainability is underestimated and remains a blind spot in many cultural policy measures. At the same time, however, environmental issues are insufficiently taken into account by international DC organisations in the design of their projects.

The power of the CCI to change behavioural patterns

The impact of the CCI on the environment is threefold. First, the CCI can bring about much-needed changes in mindset and behaviour in terms of climate change and environmental concerns.^[37] The CCI has the power to tell compelling stories and convey messages that can shape public perceptions and attitudes toward environmental issues. Through films, games, literature, art, and other forms of expression, the CCI can promote awareness, empathy, and a sense of urgency about environmental challenges. Filmmakers are producing documentaries that shed light on environmental challenges, inspiring viewers to take action. Examples include documentaries like 'An Inconvenient Truth', which focuses on climate change, and 'Before the Flood' exploring various environmental issues. Some cities and regional authorities harness popular and/or local CCI networks and nodes to address social and environmental issues, for example by using museums, libraries and other cultural spaces to engage with marginalised communities that are particularly affected by the impact of climate change. In some African countries, efforts are also underway to mobilise the arts in dialogue with cultural heritage to broaden perspectives on environmental sustainability. For example, a pilot project has been launched in seven countries to research and document case studies of intangible cultural heritage practices that address the challenges of biodiversity conservation, climate change and disaster risk reduction.^[38]

The CCI – an inspiration for environmental innovations

Furthermore, the CCI has been a source of inspiration for environmental innovation and improvements, contributing to sustainable practices and solutions. Many fashion designers and brands are incorporating eco-friendly materials, such as organic cotton and sustainable alternatives like Tencel. Designers are creating environmentally friendly packaging solutions, reducing the use of plastic and incorporating recyclable or biodegradable materials.

An often-neglected contributor to CO₂ emissions

However, the CCI is also an often-neglected contributor to CO₂ emissions. Every recording studio and theatre, music festival and film location is powered by more than just imagination and creativity and consumes energy. Additionally, the CCI is characterised by greater global movements since artists as well as cultural products travel around the world contributing to carbon dioxide emissions. New technologies, such as non-fungible tokens (NFTs), consume energy throughout their lifecycle.^[39] Therefore, the way in which culture as well as cultural and creative products and services are presented and produced needs to be adapted.^[40] There are already positive examples that reduce the CCI's carbon footprint: some music festivals are introducing sustainable practices, including waste reduction, use of renewable energy and environmentally friendly transport options.

Environmental outcomes remain the least targeted by CCI-related policies

While the CCI can play an important role in advocating for behavioural change and inspire green innovations, an analysis of 127 national sustainable development plans and policies shows that environmental outcomes are the least targeted by CCI-related policies. Reports and strategies on climate change rarely mention the role of the CCI. One of the challenges in effectively integrating the role of the CCI into national plans remains the lack of cross-sectoral coordination mechanisms. The establishment of a Commission for Sustainable Development in Estonia, composed exclusively of non-state actors from all sectors to advise the government and oversee the implementation of the Sustainable Estonia 2021 programme, is a positive example in this regard and will ensure that the role of the CCI in tackling the climate crisis is sufficiently taken into account.^[41]

2.2.3 SOCIO-CULTURAL DEVELOPMENT FOR CRISIS PREVENTION, GENDER EQUALITY AND BREAKING COLONIAL CONTINUITIES

Fostering resilience in times of crisis

Supporting a nation's CCI has a positive impact on its social and societal development. Work done under the CCI umbrella represents an important pillar of many social groups' identity formation and development. Cultural and creative products and services convey values, drive value change and can transform societies. For example, they can promote critical thinking in social discourse, envision the future, strengthen democratic values and thus contribute to crisis prevention. At

the same time, CCI programmes and cultural participation are necessary for the cohesion and resilience of societies in times of crisis, as the COVID-19 pandemic has shown. Theatre performances moved online, online city tours emerged, and creative memes and reels flooded social media channels to distract and entertain people who were locked down at home. The COVID-19 pandemic has not only shown the adaptability of the CCI, but also the importance of culture to people's mental wellbeing. This increased awareness provides a new opportunity to utilise the role of culture in the prevention and treatment of illness and to contribute to health and social systems.

Breaking through colonial continuities

In addition, the CCI can break through colonial continuities and create opportunities for encounters on an equal footing between the Global North and South. Colonial continuities and racist thought patterns are still to be found today: not only in development policy, but also at a deeper level of social thinking within societies of the Global North. One example of this is that economic, political, social and cultural norms and values of the Global North continue to be used as guides, against which countries of the Global South are measured. The relationship between the Global South and Global North is still highly unequal and is characterised by economic inequalities and the resulting dependency relationships between 'donors' and 'recipients' and 'knowledge givers' and 'knowledge takers'. This asymmetrical relationship is based on institutionalised discriminatory and racist structures that consolidate the power imbalance instead of reducing it. A power-critical reflection and recognition of one's own role and colonial history serves as the basis for an open, honest dialogue about the past and the future of relations. It is expressed, among other things, by recognising and apologising for the atrocities of colonialism, strengthening partner orientation and consideration of the country context, closer cooperation with local civil society, strengthening the voices of the Global South in international and multilateral formats.^[42]

The CCI has the power to challenge dominant historical narratives that have perpetuated colonial perspectives. Through their work, creators can offer alternative narratives that highlight diverse perspectives, histories, and experiences. Thus, it is important to make cultural and creative products of the Global South available for the Global North. For instance, in Europe, promoting art from cultures of the Global South and increasing its representation at major European events enables cultural education for a European audience. This can help to create a global understanding of art and culture, make visible postcolonial conditions, and overcome Eurocentric ideas. It can also help in shifting racial thought patterns, contribute to an overall better cultural understanding and envision a new South-North cooperation.^[43]

Closing economic, social and societal gender gaps

Strengthening the CCI helps to decrease economic, social and societal gender gaps by offering women new employment opportunities, whilst raising awareness on gender-related issues such as gender-based violence. The CCI is a sector in which women make up half of the workforce. Although the sector is considered particularly inclusive, there is no gender equality: women are underrepresented in management positions, have less access to funding and receive less recognition and visibility for their work.^[44] At the same time, the CCI can provide important public-facing platforms for women to address economic issues and draw attention to grievances, abuse and discrimination. The 2017 #MeToo movement is perhaps the most prominent example of this; after it was revealed that media mogul Harvey Weinstein had sexually abused actresses, US actress Alyssa Milano created a post on Twitter (now X) calling for any woman who had ever experienced sexual harassment or sexualised violence to respond to the tweet with the hashtag #MeToo^[45] – with a global response. The viral expansion of the movement was fuelled by leading film actresses who publicly reported on their struggles in an industry traditionally dominated by men. The result was a global debate – extending to all areas of life and professions – about sexual harassment and violence against women and the subsequent prosecution of Harvey Weinstein. Another example is the performance *Un violador en tu camino* (A rapist on your way) by the Chilean feminist art and performance collective LASTESIS. In protest against femicide and gender-specific sexual violence, the collective organised a flash mob for the first time in 2019 in front of the Supreme Court in Santiago, on the International Day for the Elimination of Violence against Women (25th November). The song and choreography became an international movement that has been carried on by women of all ages in 54 countries on six continents.^[46] Utilising visible and influential platforms within the CCI, individuals and messages can achieve great visibility and reach. Women or people from marginalised groups who are in the public eye with their art, offer tangible role models and can motivate others to become active as well.

^[45] More than a decade earlier, activist Tarana Burke coined the phrase through her nonprofit, Just Be Inc. Burke, who was sexually assaulted as a child, worked with young survivors and found that the phrase 'me too' could help assure others that they were not alone in having experienced abuse. She is widely credited as the founder of the MeToo movement (Source: <https://www.britannica.com/topic/Me-Too-movement>).



3. ANALYSING THE CCI AND DEVELOPING INTERVENTIONS

As highlighted, the CCI is an important driver for sustainable development, for economic progress as well as for social cohesion and inclusion. It does not only promote economic transformation but also offers potential for environmental and societal and socio-cultural transformation (e. g., cultural identity, diversity of opinion, overcoming colonial continuities, working conditions, inclusive growth, sustainable lifestyle, climate change) and is a cornerstone of functioning democratic societies, especially in times of crisis (see [chapter 2.2. Importance for Economic, Environmental and Socio-Cultural Development](#)). Engaging in the sector thus allows international DC organisations to achieve multiple development goals.

However, engaging in the CCI involves navigating a dynamic and multifaceted landscape that provides opportunities for engagement along various verticals (i. e. cultural vs. creative industry; sub-sector, domain, concentric cycles; or value chains), depending on how it is approached. For instance, projects focused on preserving and promoting cultural and natural heritage may involve initiatives to safeguard historical sites, traditional knowledge, and indigenous practices. Private sector programmes may design projects to support start-ups, creative businesses and innovation hubs to boost economic growth and job creation as the CCI is often associated with entrepreneurship and innovation. Development projects with a focus on education can also focus on enhancing the skills and capacities of individuals in the creative sector. This includes training programmes, workshops, and educational initiatives to empower creatives and enhance their contribution to economic development. As the CCI becomes increasingly digital, development organisations may invest in projects that promote digital literacy, technology adoption, and the use of digital platforms for creative expression and distribution.

It is therefore important to first understand from which angle development projects wanting to approach the CCI. The CCI encompasses a multitude of definitions, understandings, classifications, sub-sectors and value chains that determine on the one side how to approach the CCI and on the other side the horizon of support and engagement of international development cooperation. These must be taken into account when designing and implementing projects in the CCI. It is therefore important that international DC organisations are aware of the various concepts to define their level of engagement and focus accordingly.

The following chapter therefore begins with an overview of the various definitions and models that exist and what they mean for the engagement of international DC organisations in the CCI. It then presents various tools that help to map, understand and develop interventions for the CCI, as well as the results of their practical application in the context of the Global Project CCI. A particular focus is on tools that define interventions for private sector development. However, they can also be used cross-sectoral depending on the defined focus of the project. This will provide a comprehensive guide for international DC organisations wishing to engage in the CCI.

3.1 LEVELS FOR APPROACHING THE CCI

3.1.1 'CULTURAL INDUSTRY' VS. 'CREATIVE INDUSTRY'

The term 'Cultural and Creative Industries' has undergone evolution since the early 1940s, signifying diverse implications for economic, environmental, and socio-cultural development (see [chapter 2.2. Importance for Economic, Environmental and Socio-cultural Development](#)). It originates from the two distinctive terms 'culture' and 'creativity'. From the commencement of the 21st century onward, numerous institutions have endeavoured to enhance the comprehension of CCI in both quantitative and qualitative dimensions.

There is still no standardised understanding and delimitation of the terms – 'creative industry' and 'cultural industry'. The terms are often used interchangeably, but there can be fine differences in their interpretations; whereas in some cases the terms 'cultural industry' and 'creative industry' are used synonymously, sometimes replacing and sometimes overlapping each other. In the context of projects undertaken by international DC organisations, understanding these distinctions is important.

Although the terms 'cultural industry' and 'creative industry' are often used synonymously and a differentiation is rarely clear-cut, there are unifying criteria that make it possible to differentiate between primarily a cultural vs. creative industry:

The **cultural industry** is generally defined as all sectors (or cultural industry activities) that correspond to the classic aesthetic-media understanding of culture, produce goods and services from cultural knowledge in creative-artistic processes and thus create monetary value. The cultural industry often represents cultural practices or goods that are not primarily created for commercial purposes (e. g. cultural (heritage) tourism, museum shops, arts and crafts markets, private broadcasters). The products of the cultural industry generally have a high aesthetic, informative, symbolic and/or entertainment value.

The **creative industry** as a newer concept is usually defined more broadly and includes sectors that use creativity in the broader sense as a starting point for products and services. The creative industry is characterised by a (primarily) stronger market orientation and proximity (in contrast to the cultural sectors, they do not exist without a market) and primarily produce functional, innovative and technology-intensive (often digital) products. They usually use various types of copyrights (copyrights, trademarks, patents). The creative industry may or may not be based on based on cultural inputs.

The categorisation of sectors and corresponding characteristics on this spectrum must always be seen in relative terms – the boundaries between sectors and the cultural and creative industries are fluid, and many cultural and creative products are innovative hybrids (e. g. digital technologies for cultural heritage sites, or traditional patterns in modern design products).

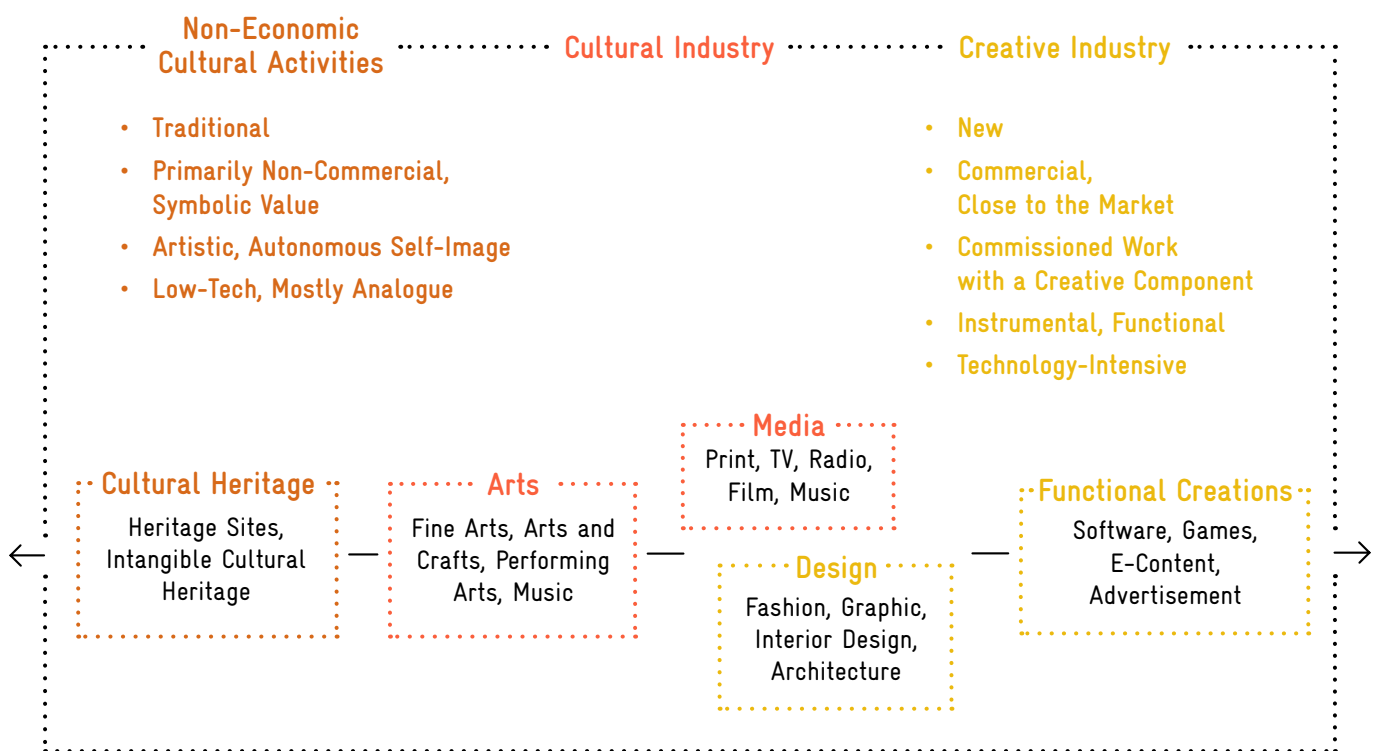


Figure 3
Cultural Industry Vs. Creative Industry
(Source: Own Figure)

In the context of international DC projects, organisations can work at the intersection of both industries or opt for one or the other:

1. Cultural Industries Projects:

Projects focused on cultural industries may aim to preserve and promote traditional cultural heritage, support local artisans, and enhance cultural exchange. These projects often have a strong cultural preservation component.

2. Creative Industries Projects:

Projects centred around creative industries may have a broader market-oriented and commercial scope, aiming to foster economic development, job creation, and innovation through the promotion of creative sectors. These projects may focus on leveraging IP, fostering entrepreneurship, and integrating creative approaches into various industries.

Ultimately, the choice of terminology may depend on the specific goals and objectives of a development project. However, both cultural and creative industries play crucial roles in contributing to economic growth, job creation, and the preservation or enhancement of cultural identity. The distinction lies in the scope and emphasis on tradition and goods that are not primarily created for commercial purposes in cultural industry, while creative industries have a broader focus on innovation and creativity across various sectors and focus more on commercial aspects.



3.1.2 DEFINING THE CCI

A consolidated definition of the CCI remains elusive. Various institutions engaged in this domain have formulated distinct definitions, emphasising different aspects.

While the United Nations Educational, Scientific and Cultural Organisation (UNESCO) emphasises the different levels and value-adding steps of cultural productions and focuses on their artistic/cultural heritage origins, originating from the organisations focus on culture,^[47] the United Nations Conference on Trade and Development (UNCTAD) underscores the importance of broadening the concept of creativity deriving from the organisations mandate on trade. UNCTAD extends creativity beyond exclusively artistic activities to encompass any economic activity that generates symbolic products for the marketplace and is strongly based on IP rights.^[48] The European Union (EU) employs the term 'cultural and creative sectors' also placing a stronger emphasis on the value-adding dimension of the sector.^[49] In alignment with the other players, the German Ministry of Economic Affairs and Climate Action grounds its understanding of the Cultural and Creative Industries on the various value-adding dimensions and the entrepreneurial nature of the actors involved.^[50]

Definitions of the CCI in detail:

UNESCO emphasises the different levels and value-adding steps of cultural productions and focuses on their artistic/cultural heritage origins:

- “Those sectors of organised activity that have as their main objective the production or reproduction, the promotion, distribution or commercialisation of goods, services and activities of content derived from cultural, artistic or heritage origins.”

The **UNCTAD** stresses the relevance of extending the concept of creativity from exclusively artistic activities to “any economic activity that generates symbolic products for the marketplace and is strongly based on intellectual property rights”. It lists the following characteristics of the creative industries:

- “are the cycles of creation, production and distribution of goods and services that use creativity and intellectual capital as primary inputs;
- constitute a set of knowledge-based activities, focused on but not limited to arts, potentially generating revenues from trade and intellectual property rights;
- comprise tangible products and intangible intellectual or artistic services with creative content, economic value and market objectives;
- are at the cross-road among the artisan, services and industrial sectors”.

The **EU** uses the term ‘cultural and creative sectors’ and thereby describes

- “all sectors whose activities are based on cultural values or artistic and other individual or collective creative expressions. The activities may include the development, the creation, the production, the dissemination and the preservation of goods and services which embody cultural, artistic or other creative expressions, as well as related functions such as education or management.”

Similar to UNESCO, the **German Ministry of Economic Affairs** centres its understanding of the CCI on the various value-adding dimensions and the entrepreneurial nature of the actors.

- “Cultural and creative industries include those cultural and creative enterprises that are predominantly profit-oriented and are engaged in the creation, production, distribution and/or medial dissemination of cultural/creative goods and services”.

A universally agreed-upon definition of the CCI has yet to be established, primarily due to a variety of factors:

1. Diversity of Activities:

The CCI encompasses a wide range of sub-sectors and activities. Each of these sectors has its unique characteristics and contributions to culture and creativity, leading to diverse definitions based on the specific focus of interventions.

2. Evolving Nature:

The CCI is dynamic and constantly evolving, driven by technological advancements, changes in consumer preferences, and shifts in socio-cultural contexts. As new forms of cultural expression emerge and existing industries adapt, definitions need to be flexible and adaptable to capture these changes accurately.

3. Geographic Variations:

Definitions of the CCI may vary depending on geographic context. What constitutes CCI in one region or country may differ from another due to differences in cultural heritage, economic structures, and policy priorities.

4. Methodological Differences:

Different organisations and researchers may employ varying methodologies and criteria when defining the CCI. This can lead to differences in the scope and boundaries of the industries considered, resulting in diverse definitions.

5. Policy Objectives:

Governments and international DC organisations may define the CCI differently based on their policy objectives. Some may focus on economic aspects such as job creation and revenue generation, while others may prioritise cultural preservation or education.

Even though definitions differ depending on context, country as well as the heterogeneous landscape of the CCI, the following common characteristics can be identified:

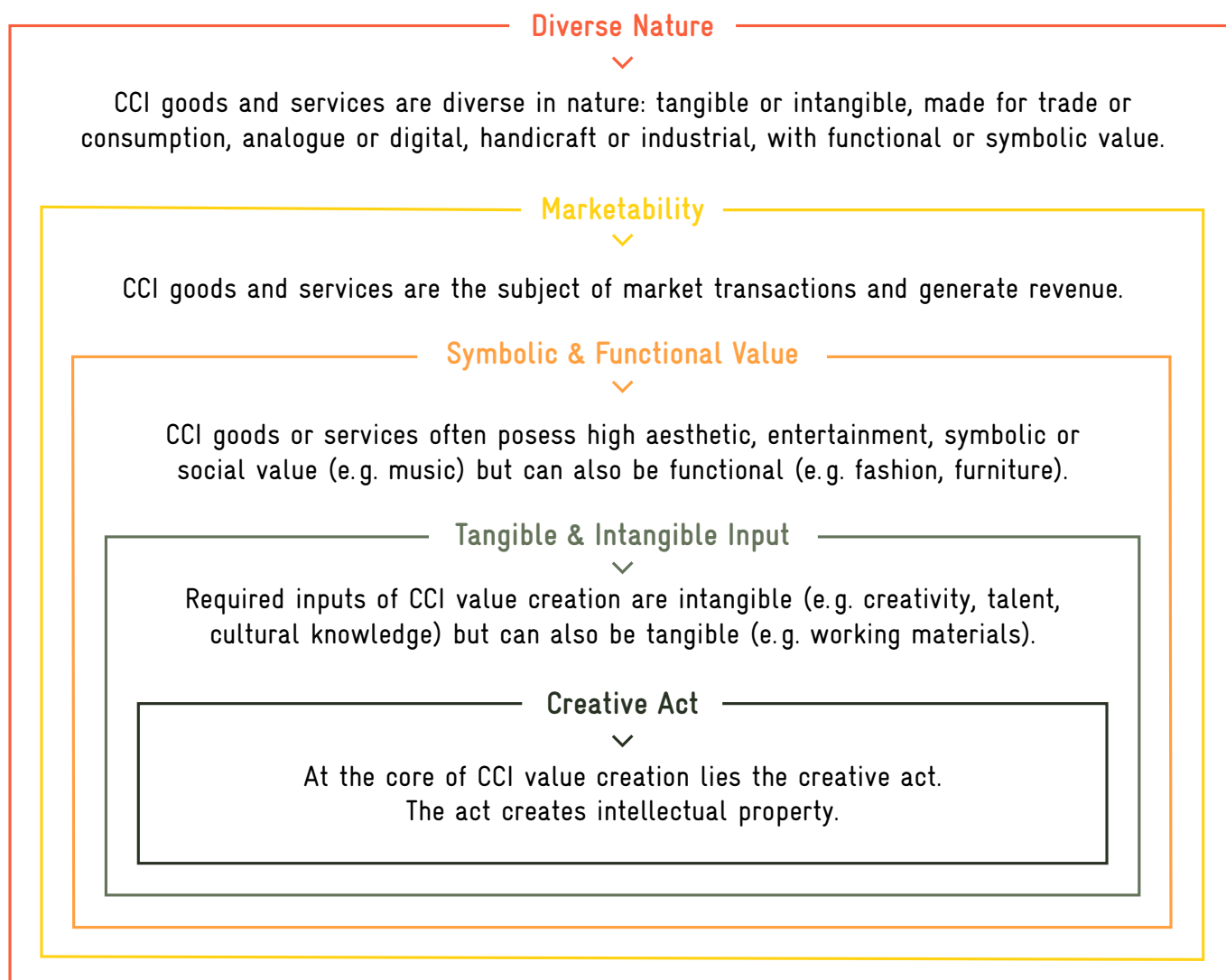


Figure 4
Common Characteristics of CCI
(Source: Own Figure)

Various definitions have emerged that include or exclude sectors of the CCI in different ways, cluster them, and relate them to each other. Understanding the definitions of the CCI according to sub-sectors, domains, and models like concentric circles allows international DC organisations to design nuanced, context-specific interventions. Knowledge of these approaches helps organisations navigate the unique challenges and opportunities presented by the diverse landscape of the CCI.



Definition by Sub-Sectors

This definition categorises the CCI into specific sub-sectors or industries. The basis of each definition is a set of economic sectors that are attributed to the CCI. However, there are some international differences as to which sub-sectors are included and which are not. Some sub-sectors appear to have been included in the CCI by virtue of consensus: including visual arts, performing arts, audiovisual media such as film, television and radio, music and print media. There is more disagreement in areas that relate to cultural heritage and without a (primarily) commercial remit (e. g., museums, cultural heritage sites, libraries, arts and crafts) as well as design and digital-based activities (such as design, architecture, fashion, advertising, software or multimedia).^[51] There are also debates about whether intellectual and digital services such as research and development or related industries such as leisure/entertainment activities, upstream and downstream goods and services (e. g. textiles, telecommunications, technical equipment manufacturing) should be included in the definitions. Sub-sector models are useful for targeted analysis and intervention in specific areas of the CCI.

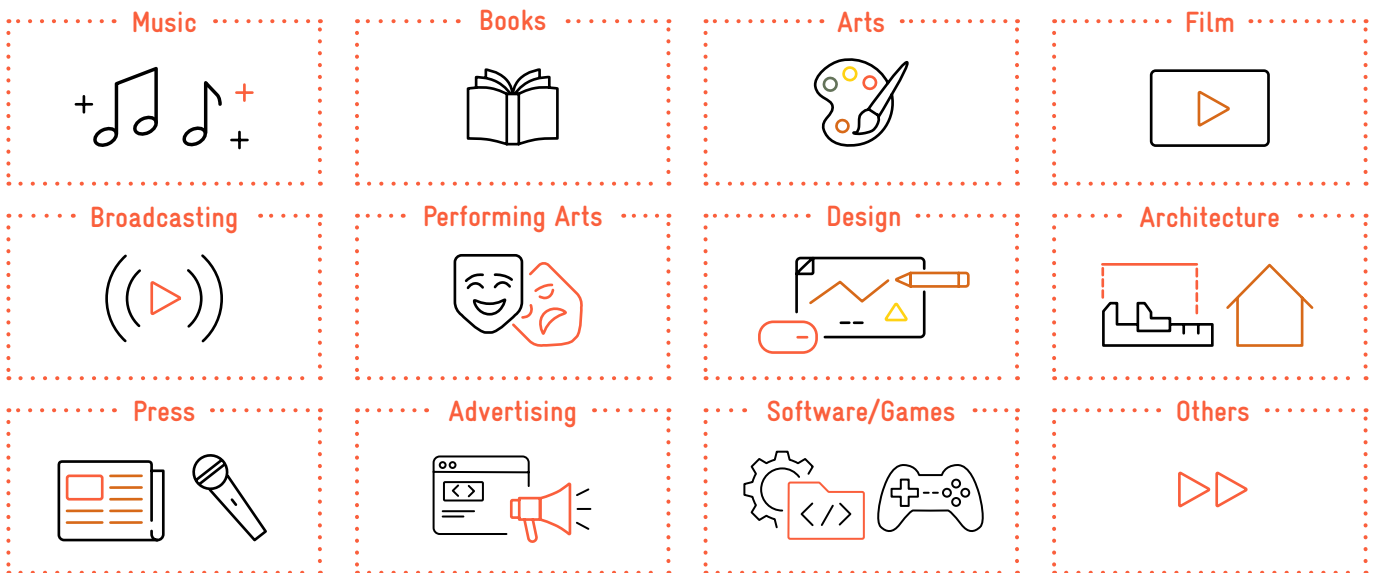


Figure 5
Sub-sectors of the CCI
(Source: BMWK 2020)

Definition by Domains

Some international institutions group certain cultural and creative sub-markets or activities into domains with similar economic and social characteristics. The UNESCO classifies the CCI into six main cultural domains. These domains include cultural activities, goods, and services that play a role in all phases of the cultural cycle model. The related domains (Tourism and Sports & Recreation) are linked to the broader definition of culture and include social and leisure activities. In addition, three transversal domains are included for their role in the culture cycle for the production and transmission of culture. The UNESCO also emphasises the influence and interaction of intangible cultural heritage, such as values, rituals, oral expressions, and social practices, on the remaining domains.^[52]

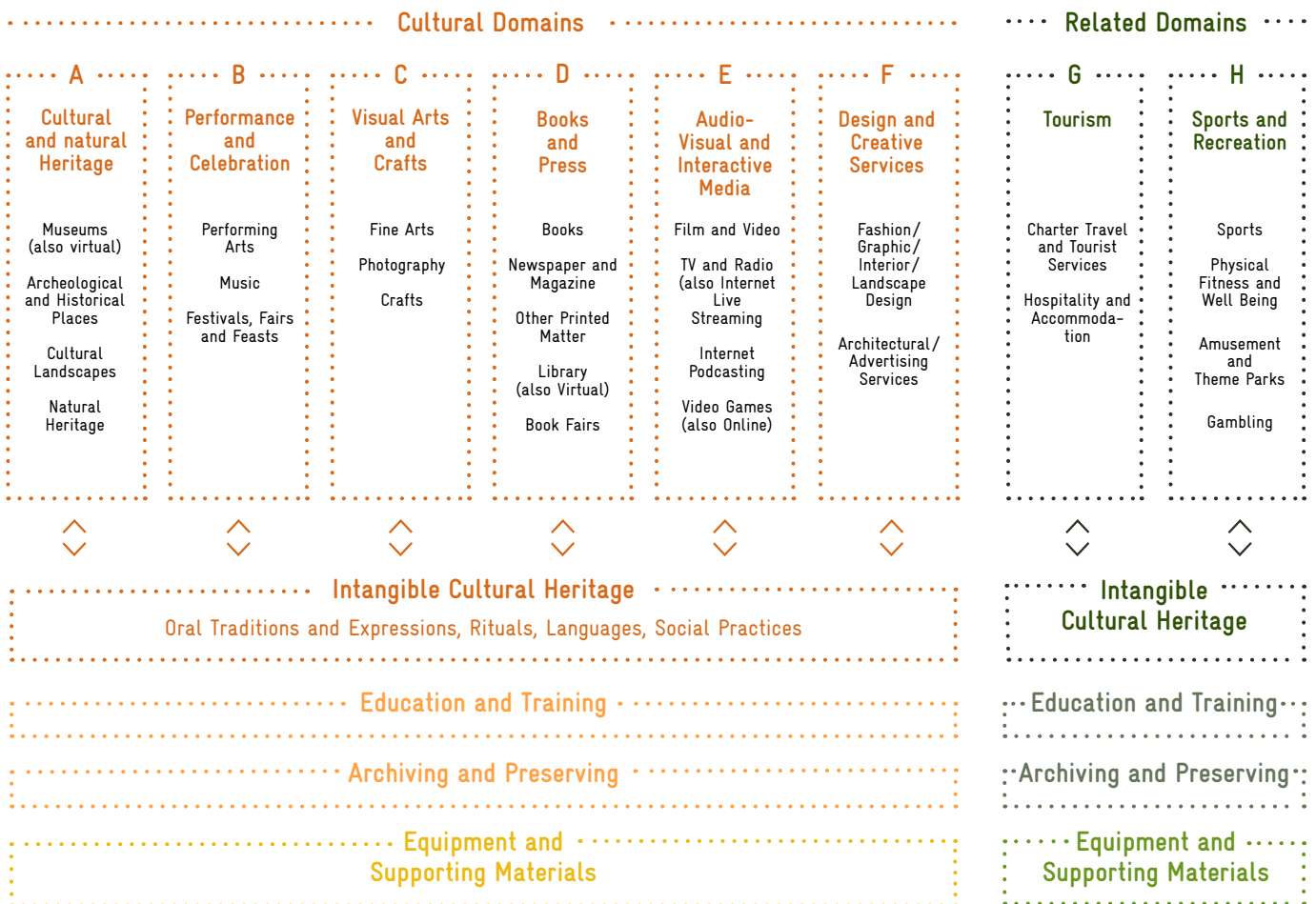


Figure 6
Domains of the CCI
(Source: UNESCO 2009)

The UNCTAD (2004) definition is similar to the UNESCO classification but differs in the grouping into domains. UNCTAD clusters cultural and creative sub-sectors into smaller groups, which in turn are categorised into four main domains: 1. Heritage, 2. Arts, 3. Media, 4. Functional Creations

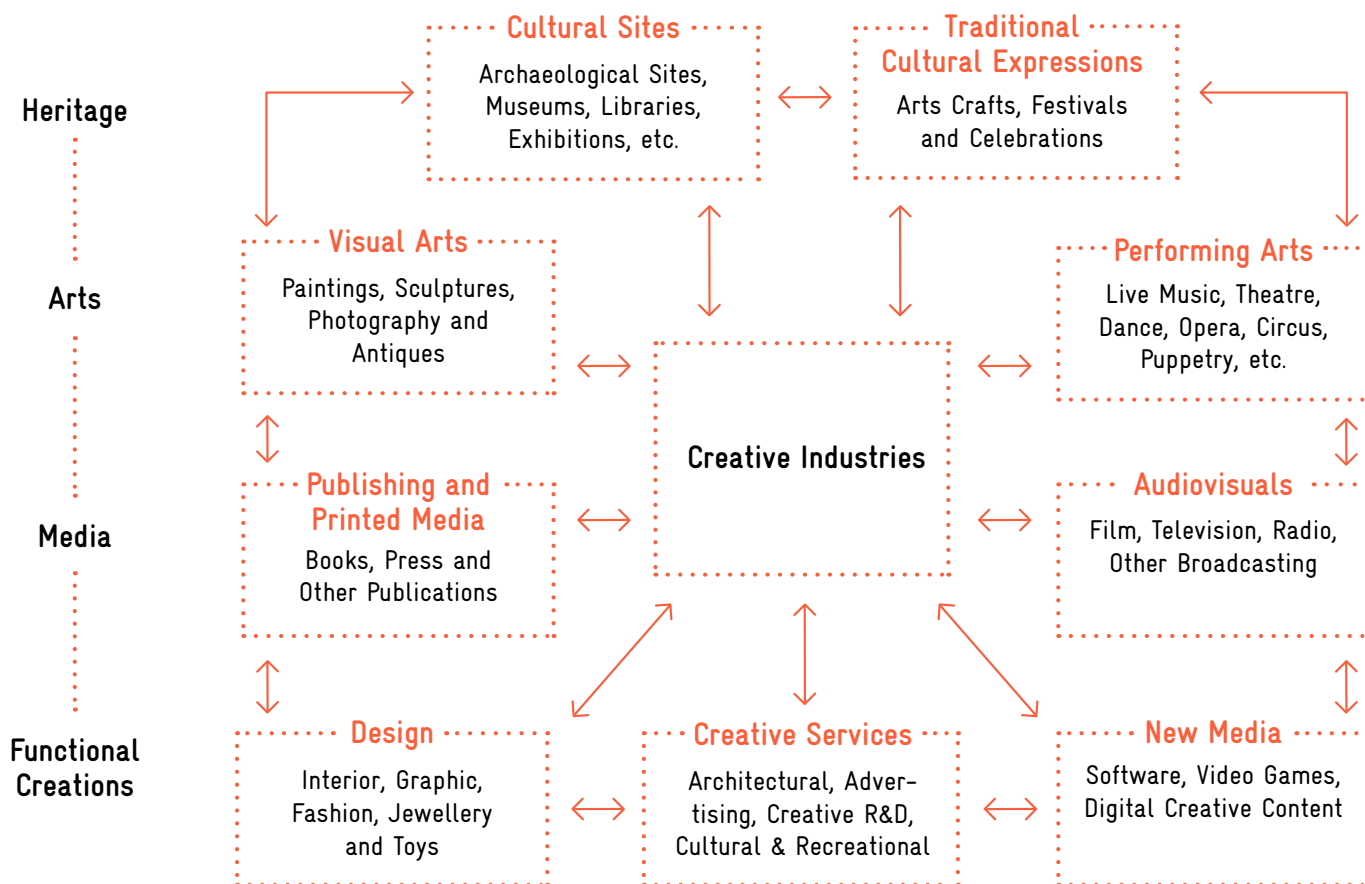


Figure 7
UNCTAD Creative Industries Model
(Source: UNCTAD 2004)

These domains are arranged on a spectrum from ‘upstream activities’ comprising more traditional, and not primarily commercial sectors (e. g. cultural heritage, performing and visual arts; more likely to be assigned to the cultural industries) to ‘downstream activities’ comprising more modern, technology-intensive and market-oriented sectors (e. g., digital services, design; more likely to be assigned to the creative industries). These models encourage a holistic approach that highlights the interconnectedness of different domains within the CCI.

Definition by 'Concentric Circles Models'

Another way of structuring the CCI and its sub-sectors are the 'Concentric Circles Models'. They are based on the idea that there are core sectors (usually 'classic' artistic, non-industrial activities), and other related economic sectors that surround the core sector like onion layers (usually creative industries and supporting economic activities). The further away from the core, the less artistic/cultural inputs these layers generally use, and the more closely they are linked to the non-creative rest of the economy. The model suggests that the growth of the core creative industries can lead to broader economic impacts in the surrounding creative economy. However, how the layers are structured (number and function) and which sub-sectors they contain varies greatly from model to model.

One of the earliest and best-known models is that of the Australian cultural economist David Throsby. According to him, all CCI sectors have cultural and economic value, but their relation differs from the inside ('core cultural expressions') to the outside ('related industries').

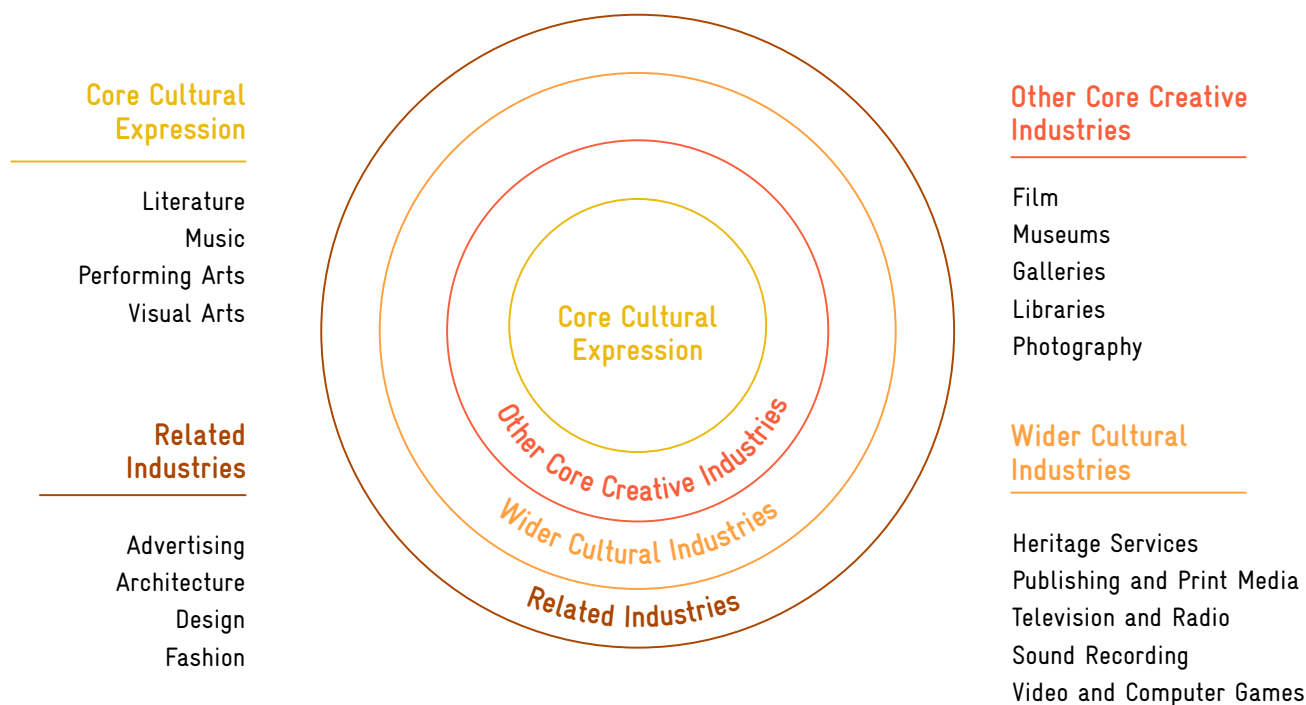


Figure 8
David Throsby Model
(Source: David Throsby 2008)

Definition by Copyrights

IP and copyrights almost always play a central role in cultural and creative productions: regardless of the nature of the cultural-creative products, they embody ideas, values, creativity and intellectual property. This becomes concrete, tradable and monetisable as soon as it is protected by copyright. In 2003, the World Intellectual Property Organisation (WIPO) developed a model that classifies various CCI sectors in terms of their use of copyrights. The model is useful for targeted interventions with a focus on sectors that provide monetisation potential for cultural and creative professionals:

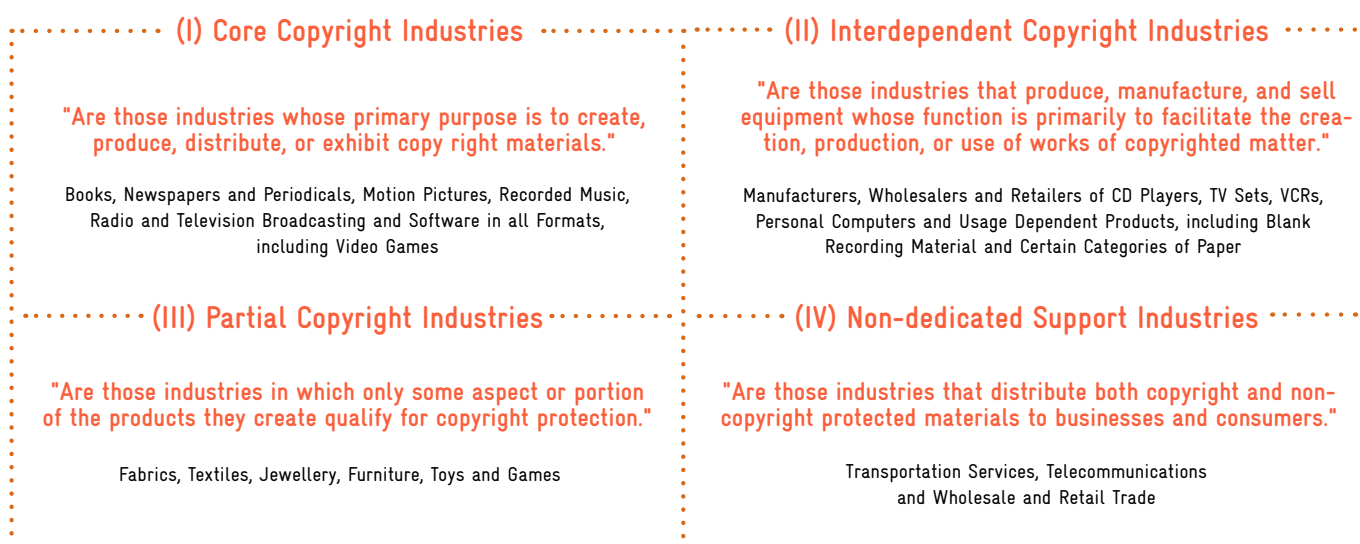


Table 2
WIPO Copyright Model
(Source: WIPO, 2003)

Developing targeted and nuanced interventions

Understanding these definitions helps international DC organisations design and implement more targeted and effective initiatives. For instance, they can tailor their support to specific **sub-sectors** within the CCI. For example, they may focus on the film industry, performing arts, or design, depending on the cultural and economic context of the region. International DC organisations can also adopt holistic approaches by recognising the interconnectedness of various **domains** within the CCI. Initiatives may aim to foster collaboration between different domains for more integrated and impactful outcomes and cross-disciplinary collaborations. By recognising the **concentric circles** of influence, international DC organisations can contribute to economic diversification. Initiatives can be designed to stimulate growth in the core creative industries, leading to spillover effects in the broader CCI. As the model also suggests a gradual expansion from core creative industries to the broader economy, international DC organisations can also use this model to plan initiatives that start with key industries and later expand to related sectors.

3.1.3 CCI VALUE CHAINS

Although several actors and institutions have endeavoured to define the CCI comprehensively, given the complex role that culture and creativity play in societies, the CCI actually encompasses a wider variety of activities and actors. This has led to a greater focus on CCI value chains, as the CCI is an important source of innovation and contribute to value creation within and across sectors.

It is beneficial for international DC organisations to focus on value chains instead of only looking at individual sub-sectors due to several reasons:

- 1. Holistic Perspective:**

By examining value chains, one gains a comprehensive understanding of the entire process involved in the creation, production, distribution, and consumption of cultural and creative goods and services. This comprehensive perspective facilitates a deeper analysis of an industry's dynamics and interconnections.

- 2. Identifying Interdependencies:**

Value chain analysis aids in identifying the compatibilities and connections between different sectors and stakeholders within the CCI. Recognising these relationships is crucial for understanding how changes or disruptions in one part of the value chain can affect other sectors and the industry as a whole.

- 3. Economic Impact Assessment:**

Focusing on value chains enables a more accurate analysis of the economic impact of the CCI. Doing so enables policy-makers, researchers, and industry stakeholders to quantify the value added at each stage of the production process and measure the industry's contribution to GDP, employment, and trade, with greater accuracy.

Value chains have been studied in a variety of academic fields, but it is widely agreed that value chains can be defined as “the full range of activities which are required to bring a product or service from conception, production, delivery to final consumers, and final disposal.”^[53] The activities that constitute a value chain can be contained in a single company or distributed across different companies. They can be located in one place (cluster) or distributed geographically. The term ‘value chain’ refers to the fact that value is added to preliminary products by combining them with other resources (e. g., tools, manpower, knowledge, skills). As the product passes through various stages, value is added.

Creative value chains according to the EU consist of an “initial creative idea, which is usually combined with other inputs to produce a cultural work, which then moves through a series of interlinked stages before it reaches the final consumer.”^[54] However, creative value chains can differ from the concept of (economic) value chains:

1. Behaviour:

Creative value chains can have a different form and behaviour than production-based value chains, and the activities within creative value chains are often interconnected, as the model developed by UNESCO (see below) shows.

2. Products vs. Services:

Creative products and services often involve intangible assets such as ideas, IP, and artistic expressions. This contrasts with traditional industries where tangible goods are a more significant part of the value chain.

3. Innovation and Creativity as Core Components:

The CCI is driven by innovation and creativity. The value creation process is centred around the generation of unique and original ideas, which may not be as prominent in traditional value chains that focus more on efficiency and specialisation.

4. Rapid Evolution and Short Product Lifecycles:

Creative products, services, and trends within the CCI often undergo rapid evolution, resulting in shorter product lifecycles. This stands in contrast to traditional industries, where products typically have longer lifespans and changes occur more gradually.

5. Networked and Collaborative Nature:

The CCI is often characterised by collaboration and networking. Cross-disciplinary collaborations and partnerships are common in the creation and distribution of creative works. Traditional value chains may have a more linear and vertically integrated structure.

UNESCO Model

In order to capture value creation in culture, UNESCO has developed the concept of a ‘culture cycle’ which includes five stages: 1) Creation, 2) Production, 3) Dissemination, 4) Exhibition/ Reception/Transmission and 5) Consumption/Participation.^[55]

The ESSnet-Culture framework

As the division of the CCI into sub-sectors, domains, and value chains is primarily used to define system boundaries for statistical data collection, the European Statistical System (ESSnet-Culture) was established at the European level at Eurostat to coordinate the harmonisation of statistics in the CCI. In line with UNESCO, ESSnet-Culture also defines a set of functions corresponding to the different stages of the creative value chains. ESSnet-Culture distinguishes between three sequential core functions (1. Creation, 2. Production/publishing and 3. Dissemination/Trade) and three support functions (1. Preservation, 2. Education and 3. Management/Regulation). Unlike the UNESCO model, the Essnet-Culture framework does not cover the entire economic cycle. It excludes, for example, production activities related to reproduction and the goods and services associated with them.^[56]

The Stylised Creative Value Chain model

The Stylised Creative Value Chain model combines both the UNESCO as well as the ESSnet-Culture model in one. The combination of both derives from the need to represent the whole economic cycle which is not represented in the ESSnet-Culture framework.

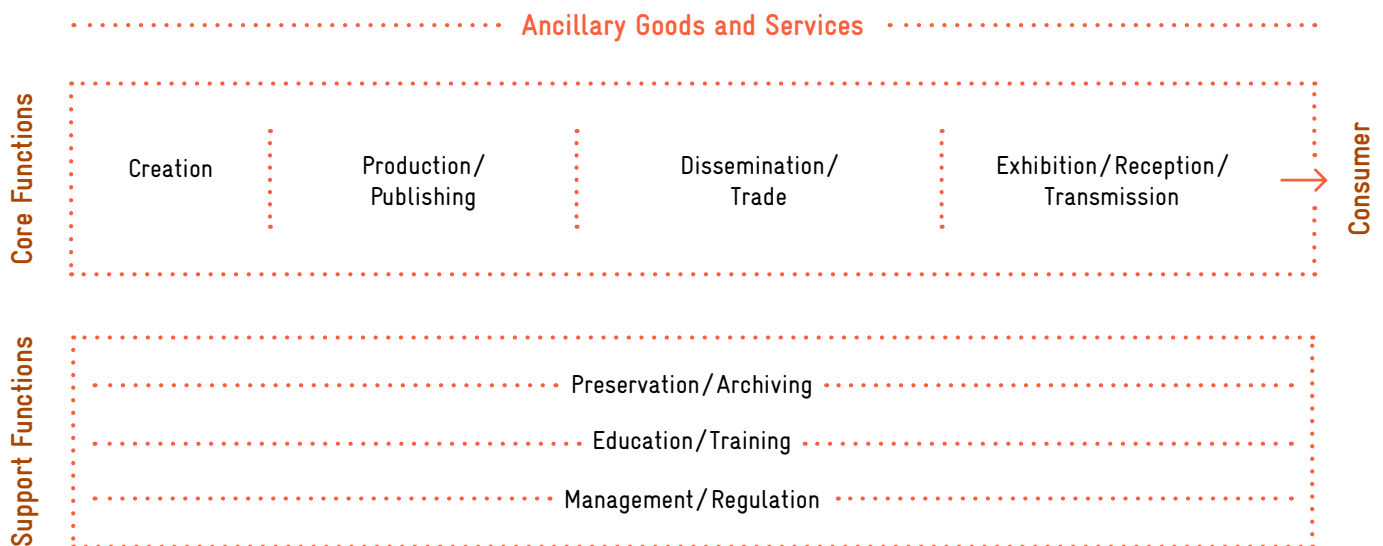


Figure 9
Stylised Creative value chain model
(Source: European commission 2017)

The model is distinguished in four core functions that interrelate with each other and three support functions.

In summary, these models serve as a valuable tool for international DC organisations to define the system boundaries of their projects by identifying key stakeholders, mapping value creation processes, understanding interdependencies, focusing on value addition, setting project objectives, and targeting interventions effectively within the value chain. Understanding

various models of value chains within the CCI also facilitates the modelling and replication of well-functioning value chains in the specific country contexts where international DC organisations are operating. The individual value chains can serve as reference for international DC organisations, but also policy-makers and external stakeholders. Potential functions include informing on causes of market failures, or understanding blockages and gaps in the value chain(s) that could be addressed through support interventions.

Some common gaps identified when analysing value chains within the CCI of countries in the Global South relate to lack of institutional support; producers not having sufficient skills and technology to meet demand; and ethnic minorities not being connected enough to markets, among others.^[57] International DC organisations can strategically intervene at various stages of the value chain within the CCI to achieve impact. However, a careful value chain analysis should form the basis for interventions (see [3.2.2. Value Chain Analysis](#)).



3.2 TOOLS AND APPROACHES TO ANALYSING THE CCI

As emphasised in the previous chapters, it is crucial to first determine the classification model and identify the sub-sectors or value chains that are best suited to intervene in the CCI. They may differ from country to country and depend on the overall impact the project is intended to achieve (e. g. job or income creation). For example, an OECD study found that the strongest CCI sub-sectors in the overall business economy vary greatly across OECD countries. The sectors that are targeted by international DC organisations can therefore vary from country to country. However, four sectors make the largest contribution to Gross Value Added (GVA) in EU-27 countries: (i) printing and reproduction of recorded media, (ii) programming and broadcasting activities, (ii) motion picture, video and television programme production, sound recording and music publishing activities, and (iv) architectural activities. The first three of these sectors together account for just under a third of total CCI GVA in the EU-27, demonstrating the importance of the film and television value chain to national economies.^[58] Therefore, international DC organisations that have a broader scope can also look at a cumulative level to identify target sub-sectors and value chains. However, as already emphasised, there is a lack of statistical data in many countries, particularly at sub-sector level, which makes direct comparison between countries difficult and should be considered before committing to specific sub-sectors.

Against this background, international DC organisations involved in the CCI should conduct thorough analyses before starting projects. To this end, a number of tools and approaches to analyse the CCI have been developed for use by development practitioners. The tools are briefly presented in the following chapters. In addition, brief findings from the Global Project CCI and other analyses are presented to demonstrate the practical application of the tools and approaches.

3.2.1 ECOSYSTEM MAPPING

'Guide for Mapping the Entrepreneurial Ecosystem'

Businesses, especially micro, small and medium enterprises (MSMEs), play an essential role in the CCI. Conducting an entrepreneurial ecosystem analysis for the CCI is therefore crucial for several reasons. Analysing the entrepreneurial ecosystem provides insights into the complex dynamics, challenges, and opportunities within the creative entrepreneurial landscape:

- 1. The CCI is multifaceted, involving a wide range of creative disciplines, businesses, and support structures. An ecosystem analysis offers a holistic understanding of the entire creative entrepreneurial landscape.**
- 2. There are still limited support structures for cultural and creative professionals, practitioners and entrepreneurs. Thus, networks play an important role in the CCI. Mapping the ecosystem reveals the interconnections and relationships among various entities in the CCI and provides insights in structures and networks that need further strengthening.**
- 3. Policies continue to insufficiently target the CCI. Thus, understanding the policy and regulatory environment is critical for navigating challenges and capitalising on opportunities within the CCI.**

With this in mind, GIZ has developed a 'Guide for Mapping the Entrepreneurial Ecosystem'. It can be used for analysing key commercial networks, nodes and gaps experienced by creative and cultural businesses; the reader is led through the process of observing, analysing and visualising the institutions, actors and prevailing culture that makes up the entrepreneur's environment. The mapping helps to identify gaps and constraints and facilitates the development of appropriate measures; the process can be carried out within a timeframe of three to four weeks.

The guide analyses the entrepreneurial ecosystem based on three elements:

1. The business environment and investment climate (outer circle)
2. Actors that are interacting with one another, and (middle circle)
3. An entrepreneurial culture and attitude towards entrepreneurial activity (inner circle)^[59]



Figure 10
The three elements of the entrepreneurial ecosystem (Source: GIZ 2018)

GIZ 2018 'Guide for Mapping the Entrepreneurial Ecosystem'

International DC organisations wishing to map the entrepreneurship ecosystem in the CCI can find all the information and tools in the guide [here](#).

Major Findings of the Entrepreneurial Ecosystem Mapping of the CCI

In order to understand the entrepreneurial ecosystem of the CCI in the partner countries, and to develop country-specific, actionable recommendations, an analysis was conducted using the GIZ 'Guide for Mapping the Entrepreneurial Ecosystem'. The analysis had a general focus on job creation, with sub-sectoral focuses for each partner country:

IRAQ Design & Fashion	JORDAN Design & Fashion	LeBANON Design, Music, New Media & Fashion
Kenya Music, New Media & Fashion	SENEGAL Music & Fashion	SOUTH AFRICA New Media & Fashion

The study found that in some countries, the entrepreneurial ecosystem is conducive and supportive; in others, it is overshadowed by a lack of policies, challenging infrastructure, and political or religious and systemic disadvantages.

With regard to the **entrepreneurial culture** and **attitude towards entrepreneurial activity**, the study found that despite the need to simultaneously function in the creative space and business reality, societal views of freelancers and MSMEs in the CCI are often stigmatised as not being able (or interested) to find work in the formal sector. This situation is even more challenging for women and minorities in many regions. However, public perceptions toward creative jobs are slowly changing in some countries, with the proliferation of new tech-based solutions, enterprises, and business models. The perception of an artist improves significantly when one becomes a local, regional, or global star or influencer, with the necessary number of clicks, followers and views to prove it.

Analysing the dimension of **actors**, the study found that in many countries, interactions between ecosystem actors are fragmented, limited to main cities and competition overrides many attempts to collaborate. The support from public actors like ministries, regulators and export promotion agencies often focuses on high-profile agricultural or tech sectors. Entrepreneurs in the CCI can often feel ignored.

The **business and investment climate** remains uncondusive to fostering a strong CCI. Governments need to be held accountable for inclusive promotion of the sector. At a national level, they could increase their support with policy and regulations, facilitate export opportunities and provide up-to-date research. They could also ensure that CCI is taught in school curricula to prepare for future labour markets.

Policy-makers, educational institutions and the finance community are criticised for not supporting enthusiastic, creative talent to launch and grow sustainable enterprises. At the same time, many young people focus solely on their creative inspirations and ideas, without acquiring the business acumen necessary to build a successful enterprise.

Some challenges, solutions and recommendations are cross-country and cross-sectoral. They should be addressed at a global level, such as preparing for digital innovation and providing venues for creative exchange, and business collaboration. Other developments are sector-specific, like the push for circularity and sustainability in fashion, or the need to monetise music and protect IP on streaming platforms.

Other global trends include the desire for more creative hubs and spaces where entrepreneurs can find support and synergise with other creatives, within and beyond their sub-sectors. Some innovative solutions in the area of access to finance, such as alternative credit scoring through the analysis of mobile money usage patterns, require a critical mass of users and applications – as demonstrated in Kenya.^[60]

3.2.2 VALUE CHAIN ANALYSIS

'ValueLinks 2.0 – Manual on Sustainable Value Chain Development'

As highlighted above, improving value chains is a useful avenue of engagement in the CCI. Conducting a value chain analysis is therefore crucial for several reasons.

1. Value chain analysis helps international DC organisations to understand the reasons for market failure and to identify gaps in the various steps of the value chain.
2. Analysing value chains also helps to ensure sustainability and scale, improve the understanding of key actors and their role in the value chain, and identify market opportunities.

3. According to UNESCO, studies analysing value chains can also identify models that can be scaled, replicated or disseminated in other CCI sub-sectors.^[61]
4. As greening value chains becomes increasingly important, value chain analysis also allows organisations to assess the environmental and social impact of their activities.

In order to provide international DC organisations with a practical guide for the development of value chains, GIZ and ValueLinks have compiled the ‘ValueLinks 2.0 – Manual on Sustainable Value Chain Development’. It is applicable across regions. The manual does not offer a fixed methodology but comprises a collection of well-known tools from which users can select the one that best fits in the given context. Unlike the previous edition, ValueLinks 2.0 places the idea of a green and inclusive economy in the centre and shows the potentials and limitations of the value chain approach.^[62]

GIZ and ValueLinks 2018 ‘ValueLinks 2.0 – Manual on Sustainable Value Chain Development’

International DC organisations wishing to conduct a value chain analysis for value chain development in the CCI can find all the information and tools in the manual [here](#).

Major Findings of the Value Chain Analysis of the CCI

While value chains in the CCI share common elements such as creation, production, dissemination, and exhibition, they differ significantly in terms of their specific creative processes, channels, and consumer behaviours. These value chains can vary widely, ranging from relatively simple ones like the visual arts value chain; where artists directly produce artwork, exhibit it in galleries or online platforms, and sell it to buyers either directly or through intermediaries; to highly complex structures such as the film or music industry value chain. Film and music value chains involve extensive collaboration among diverse stakeholders, intricate production processes, and multifaceted distribution channels.

To offer a more detailed illustration about the complexities of the different value chains in the CCI, the **creation/production** and **dissemination process** of the music, fashion and film industry are examined below.

In the music industry, the **creation and production** process typically involves artists, musicians, songwriters, recording technicians, and record companies. The ownership rights for the composition differ from those for the sound recording. These two components may be managed by different entities within the value chain. For instance, the musical work is typically overseen by the music publisher and relevant collective rights management organisations, which act on

behalf of songwriters and composers. In contrast, the sound recording is typically managed by the record label and associated collective rights management bodies, representing artists, musicians, and/or producers. The digital revolution has significantly impacted the production stage, particularly with the rise of self-production facilitated by technology. For instance, electronic music creators can compose using specialised music sequencers and digital audio workstation (DAW) software, such as Ableton.^[63]

In the fashion industry, the creation process involves designing, prototyping, pattern-making, and manufacturing garments and accessories. Designers may work with textile manufacturers, seamstresses, and artisans to produce their collections.

The film industry is a highly capital-intensive industry. In the United States, the film industry is dominated by a small collection of bigger studios, operating under 'all-in-house' models exemplified by entities like Walt Disney Studios and Sony Pictures Motion Picture Group. These companies undertake the development, production, and marketing of their products internally. In contrast, the European Union film market comprises a multitude of smaller entities functioning at various stages of the value chain. Independent film production feeds into this market, and is similarly characterised by fragmentation of development, financial, production, post-production and distribution expertise and investment. Fragmentation was identified as one of the weaknesses potentially preventing the EU film industry from flourishing in the digital age. The creation and production process in the film value chain is usually initially validated by the producers and the screenplay is created by a creative team that includes script writers and directors, supported by development executives from production companies and/or institutional bodies. Securing production finance and 'pre-sales' investment are crucial steps in realising film projects, often involving agreements with broadcasters or specialised distribution companies. While the financing is often done by traditional investors, digitalisation is offering new avenues for securing funding online through innovative grassroots processes, such as crowdfunding campaigns or devolved Video on Demand (VOD) platforms. Production and post-production involve various skilled collaborators, such as directors, actors, technical crew, VFX artists, and editors. Generally, the creation of cultural and creative products involves a highly iterative, collaborative and subjective development and production process. Artists, designers, writers, and other creators often draw on inspiration, experimentation, and innovation to develop original content. This creative process adds complexity to value chains as it is inherently unpredictable and non-linear.^[64]

In terms of **dissemination**, the digital transformation of the CCI has significantly altered traditional value chains, introducing both new complexities and opportunities to the dissemination process. For example, music distribution now encompasses a diverse range of channels: physical formats such as CDs and records retain a niche following, whilst digital platforms

like streaming services and online stores dominate the market. Typically, record companies oversee the distribution of their productions across these various channels. Major labels often exhibit vertical integration, handling both production and distribution in-house, whereas independent labels typically delegate distribution to major labels or established independent labels with robust distribution networks. Formal distribution agreements are essential for selling products in third-party markets.^[65]

Similarly, distribution channels within the fashion industry encompass brick-and-mortar retail, online retailers, fashion shows, and pop-up events. Designers have the option to sell their collections directly to consumers or through various retail channels such as e-commerce shopping platforms, boutiques and pop-up micro-sites, to mass-market collaboration with leading high-street chains.

In the film industry, distribution channels in both the EU and Hollywood involve sales agents who negotiate with national distributors across different regions. In the independent film sector, projects are typically disseminated by a range of national distributors who are also responsible for marketing and promoting the film. Distribution platforms span physical venues and products (e.g., cinemas, DVD/Blu-Ray) as well as digital channels (broadcasters, streaming platforms).^[66]



Photo: GIZ/Ellis & King

It is crucial for international DC organisations active in value chain development to grasp these differences, particularly considering the geographic nuances, as exemplified in the film value chain. This understanding enables effective management and optimisation of every node in the value chain. The following graphic illustrates the stylised value chain of the music sub-sector, showcasing the potential complexities within CCI value chains.

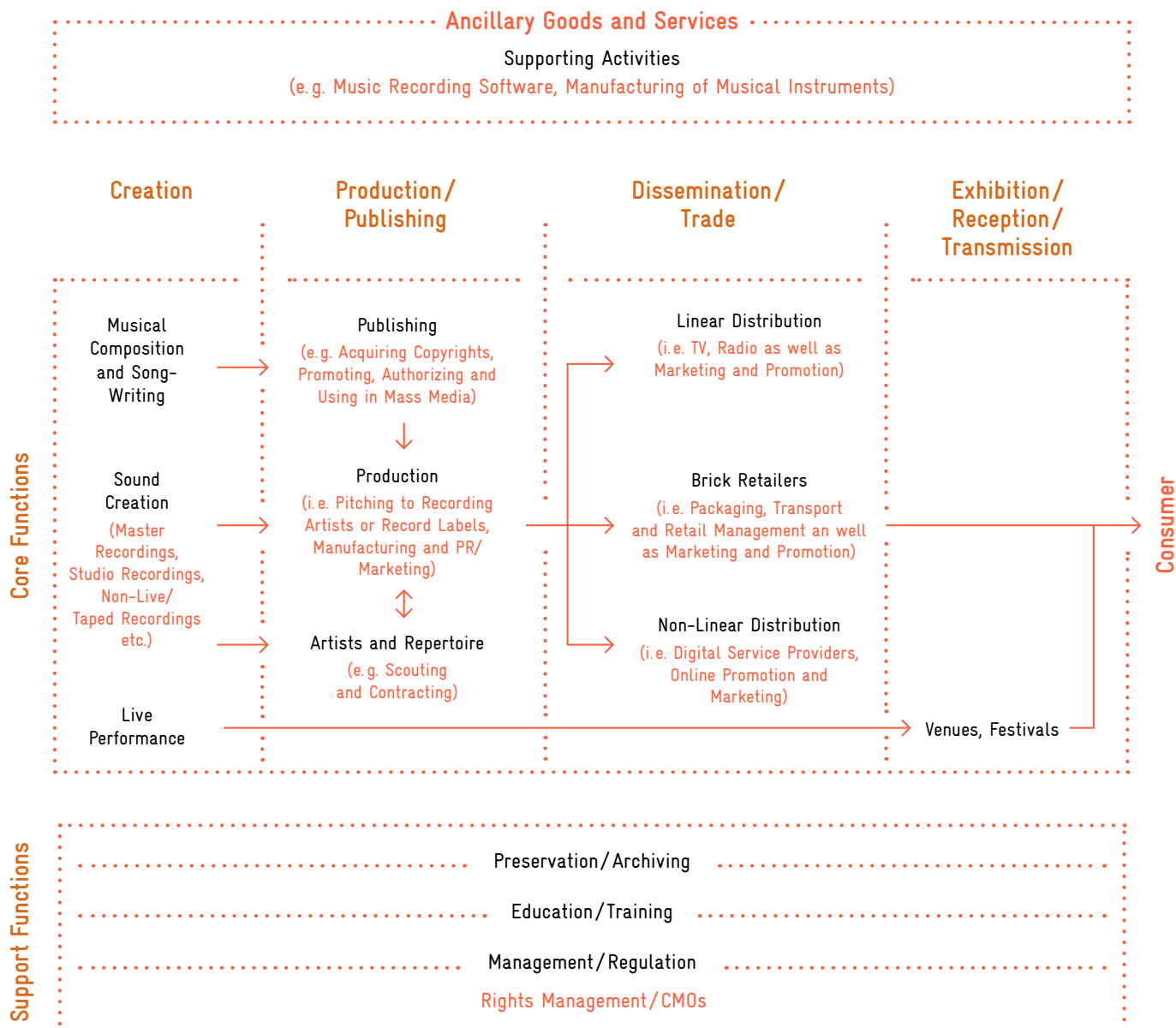


Figure 11
Stylised Value Chain - Music
(Source: EU 2017)

3.2.3 GENDER ANALYSIS

Conducting a Gender Analysis

In the ever-evolving landscape of the CCI, the issue of gender equality is of paramount importance. These industries serve as crucial platforms for artistic expression, social change, innovation and economic growth. It is imperative to understand and address the gender-based challenges that persist within them. Recent statistics highlight the pressing need for an in-depth examination of gender dynamics within the CCI worldwide.

Conducting a gender analysis for the CCI is therefore crucial for several reasons:

1. Gender analysis sheds light on existing inequalities and disparities between genders within the CCI.
2. Gender analysis helps assess whether men and women have equal opportunities for participation, leadership, and advancement within the CCI.
3. A diverse and gender-inclusive workforce is linked to increased innovation and creativity.
4. Gender analysis helps to uncover underlying stereotypes that hinder women in realising their full potential.

Various tools and methods can be used to thoroughly analyse the gender-specific situation in the CCI. For example, the methodology for analysing the entrepreneurship ecosystem (see chapter [3.2.1. Ecosystem Mapping](#)) can be adapted to also gain information on:

1. **Business and Investment Climate (in particular the environment):**
Crucial aspects such as access to resources, policies, working conditions, personal and work-life balance, employment and gender pay gaps, fiscal policies, and labour market reforms. By uncovering these complexities, the analysis provides insights into areas that demand reform and policy realignment, thereby fostering an environment conducive to gender parity.
2. **Actors that are interacting with one another (in particular multi-stakeholder partnerships and practices):**
Inclusive contracts and conventions with other players, inclusive communication and marketing mechanisms and action plans, as well as networking with stakeholders. By assessing these collaborative efforts, it is possible to identify strategies to replicate their successes and build on their shortcomings.
3. **Entrepreneurial Culture and Attitudes (in particular stereotypes):**
Cultural barriers and deep-rooted gender-based stereotypes that impact women's career choices. By unraveling these societal norms, the factors that hinder or empower women can be illuminated, thus paving the way for informed interventions that can redefine traditional notions of gender roles.

Gender analyses can also take a broader view and examine issues such as access to justice, gender-based violence and domestic violence, access to education, access to healthcare, as well as lesbian, gay, bisexual, transgender, queer and intersex (LGBTQI+) rights, to address the many challenges faced by women. There are a number of different frameworks and tools for conducting a gender analysis (e.g. Harvard Analytical Framework, Moser Framework, Gender Analysis Matrix) that international DC organisations can choose from depending on the scope and focus of the project. They often offer a step-by-step approach to conducting the analysis and address gender issues from different angles.

Major Findings of the Gender Analysis of the CCI

The Global Project CCI recently conducted a gender analysis in its partner countries. Its aim was to understand the ecosystem and develop actionable recommendations for equal empowerment and job creation for women (alongside LGBTQI+ individuals and people with disabilities) working in the CCI. The analysis covered the four CCI sub-sectors: 1) Fashion, 2) Music, 3) New Media/Animation and 4) Design.

With regard to the **business and investment climate**, women in the CCI face the detrimental effects of gender-based labour division. They are significantly underrepresented in roles and positions traditionally associated with male occupations. This gender segregation becomes further prevalent through vertical segregation, wherein women within the same sub-sectors hold lower-paid jobs and face limited representation in managerial positions. This disparity is evident across various domains, including music production, animation film direction, and more. For instance, within the music sector, women are further marginalised by the ‘boys club’ effect. This effect refers to a phenomenon where men establish exclusive relationships and integrate one another, often side-lining women from the sector and impeding their ability to thrive and advance. This is particularly evident in management and programming roles.

Across all sub-sectors, women face resource-related difficulties that hinder their advancement and limit their creative pursuits. One of the major obstacles is the struggle to secure adequate funding, which restricts their ability to develop, produce, and showcase their artistic endeavours. Limited access to loans, grants, and venture capital disproportionately affects women’s entrepreneurial ambitions in many different sectors and prevents them from realising their creative visions on an equal footing. This gender-based constraint is particularly exacerbated in the CCI, as the sector is often perceived as high-risk and many financial institutions continue to avoid investing in creative or cultural ventures as a result. Support funds for women-owned businesses play a crucial role in empowering women entrepreneurs by providing comprehensive training and support programmes. These initiatives encompass a range of services, including mentoring, business capacity-building, and confidence-building activities. Innovative capacity-building strategies are useful to women and offer flexible financing mechanisms tailored to the specific needs of crea-

tives in the industry. For instance, in Kenya, the HEVA Fund launched a finance and business support facility aimed exclusively at women-owned or women-led, early-stage enterprises. The facility provided working capital and financial support for the acquisition of production assets.

Women's exclusion from the CCI is exacerbated by the digital gender gap. This gap does not simply restrict women's access to emerging opportunities in the digital economy, it also hampers their ability to fully harness the creative potential that digital platforms offer, particularly within the new media sector. On the **governmental** level, cultural policies across various sectors and countries lack gender sensitivity. However, it is worth noting that development strategies of the government for the CCI in Kenya have a specific focus on women whilst South Africa is actively promoting LGBTQI+ rights (beyond the CCI).

On the level of **interacting actors**, the gender analysis found that a range of civil society and private sector initiatives have emerged that provide targeted support to women in the CCI. These initiatives serve as entry points to address the specific needs and challenges faced by women in the industry. There has been a rise in local non-profit organisations who support young women professionals across various creative sectors. These organisations offer a range of comprehensive support, including capacity-building programmes that promote technical and entrepreneurial skills. Additionally, vocational training centres have been established to provide high-quality training in CCI. These collective efforts aim to empower and equip women with the necessary tools to succeed in their chosen CCI disciplines. For instance, in South Africa, the non-profit organisation Africa Beyond 4IR (AB4IR) aims to bridge the digital and gender gaps in access to technology in townships (see chapter [5.5.2. Integrating Job Placement Opportunities in Training Interventions](#)). In collaboration with the private sector and development partners, the Drone Divas programme was initiated to train women in drone operations and entrepreneurship. After the training, the top ten participants were given the opportunity to complete a three-month internship with a private sector company.

Aligned with prevalent norms and beliefs globally, the CCI in the six analysed countries, where **entrepreneurial culture and attitudes** were assessed, are influenced by patriarchal cultures. These patriarchal cultures shape beliefs and stereotypes regarding the role of women in society. In the sectors analysed, gender barriers and stereotypes are most evident in the new media and animation sectors, limiting women's access to careers. For instance, although the majority of graduates in the field of new media and animation in Lebanon are women, gender barriers still hinder their access to the labour market. In South Africa's game industry, predominantly white men are employed, while women of colour remain underrepresented. In the fashion industry, on the other hand, men often encounter social barriers when trying to enter the sector. Fashion professions carry social stigmas, such as being associated with school dropouts which limits family support for those choosing to pursue fashion studies. While

women make up the majority of the workforce, they still face challenges due to gender roles and stereotypes. For example, women designers are frequently labelled as tailors rather than recognised as genuine entrepreneurs.

In the pursuit of fostering a more inclusive and equitable CCI, the study presented a set of targeted key recommendations spanning awareness and sensitisation, data and evidence, ecosystems, and policy and global partnerships:

- **Awareness and sensitisation:**

A pivotal recommendation is to foster awareness regarding women's participation in the CCI. This entails highlighting the substantial income, job opportunities, and business potential within the sector. To ensure a comprehensive approach, the study advocates for involving men and industry leaders in activities that promote gender inclusivity. Additionally, a key recommendation is to promote success stories and celebrate women role models within the industry.

- **Data and evidence:**

Recognising the significance of informed decision-making, the study recommends robust support for the collection of sex-disaggregated data. Collaboration with key stakeholders, such as trade unions, professional associations, universities, and established international networks like Women in Music or Women in Animation, is crucial to enhancing the depth and quality of gender-related data.

- **Ecosystems:**

Institutions dedicated to women's empowerment play a pivotal role. The study recommends providing support to advocacy institutions, including professional associations, non-governmental organisations (NGOs), and unions that advocate for gender-responsible decent work conditions in the CCI. Additionally, organising women-oriented hackathons and competitions is proposed to encourage women's participation and foster innovation.

- **Policy and global partnerships:**

The study also recommends building new partnerships and strengthening existing ones committed to gender equality. For instance, it is suggested to capitalise on the growing commitment to gender equality in the new media and animation sector by collaborating with major companies. Furthermore, fostering partnerships with key international stakeholders is deemed crucial to amplify the impact of global initiatives dedicated to advancing gender equality within the CCI.^[67]

International DC organisations seeking to learn more about the gender situation in the partner countries of the Global Project CCI can find a summary of the study [here](#).

3.2.4 ELMA-STUDY

Guide 'Employment and Labour Market Analysis (ELMA)'

Job creation is a key priority for many international DC organisations. As the CCI in particular contribute significantly to the creation and retention of jobs, it is crucial to understand the labour and employment situation, related skills gaps, and other challenges in partner countries. This forms the basis to develop appropriate strategies and measures for the promotion of additional and the retention of existing employment opportunities. Conducting an employment and labour market analysis for the CCI is therefore crucial for several reasons:

- 1. Analysing employment trends provides insights into the size, composition, and structure of the workforce within the CCI.**
- 2. An analysis of the labour market helps identify the specific skills and competencies demanded by the CCI.**
- 3. Labour market analysis helps identify new and emerging occupations within the CCI.**
- 4. Insights into the labour market guide the design and adaptation of education and training programmes to meet industry needs.**

For this purpose, GIZ has developed a methodological guide 'Employment and Labour Market Analysis (ELMA)'. It identifies the most promising opportunities to increase productive and decent employment in a country. An ELMA typically requires the involvement of stakeholders in a participatory process. Conceptually, it follows the Integrated Approach to Employment Promotion (IAEP) developed by the German Development Cooperation (GDC) encompassing three pillars: (1) labour supply, (2) matching and labour demand and (3) the overarching framework conditions for employment.

An ELMA can be done with a national, regional, local or sectoral view. In its most comprehensive form, an ELMA would analyse:

- **National framework conditions for employment across all regions in a country;**
- **The supply and demand side (e. g. across all economic sectors) of the labour market;**
- **The matching mechanisms of the labour market in a country.**

An ELMA with a regional focus looks at a sub-system within a country (administrative economic region). A local focus ELMA looks at an even smaller area, mostly referring to a town, greater town or a municipality. An ELMA with a sectoral focus first selects economic sectors which are most promising to generate decent employment for a large number of people.^[68]

GIZ 2021 'Full and Productive Employment and Decent Work for All: Handbook on Employment Promotion in Development Cooperation'

International DC organisations can find further information [here](#).

Major Findings of an ELMA of the CCI in Nigeria

In order to understand the employment and labour market situation with regard to the CCI in Nigeria (**sector level focus**), the project 'Skills Initiative for Africa' conducted an ELMA using the GIZ ELMA Guide. Skills gaps to be bridged need always to be seen in the context of the labour markets to which they relate and cannot be isolated from them. Sometimes only a combination of measures can lead to employment. The study was conducted in Nigeria under the conditions of the COVID-19 pandemic and provided insights and best practice conclusions to identify some of the key interventions to promote employment-orientated skills development in the CCI in two sub-sectors that attract young people: **fashion** and **game development/e-sports**.

The study found that the Nigerian CCI has attracted a lot of global attention in recent years, particularly in the areas of film, creative writing and music, which increases the potential for investment and promotion. The Nigerian fashion and game development/e-sports sectors are in no way inferior to this potential. However, in both sectors, there is a mismatch between the supply of labour and talent, and the demand for labour and talent.

On the **labour supply** side, Nigeria's CCI suffer from numerous skills gaps. It is an overly informal sector that relies on social networks and word of mouth for recruitment. In addition,

there are few tertiary and higher education institutions that could close the skills gap in these sectors. Other structural problems in the sectors include regular breaches of copyright, weak industry associations and lack of clustering, distribution and infrastructure (e. g., cinemas). To address this issue, industry leaders have called for an effective policy framework for the creative industry that recognises the interdependence of skills, investment, and infrastructure. The study also found that the existing creative workforce in the sectors analysed needs to be upskilled in collaboration with industry, especially in digital skills. The study emphasises that updating and adapting curricula (from school to university) would at least ensure access to artistic and digital skills, as well as applied creative skills. There are major skills gaps in each sector, such as scriptwriting for film or business management for fashion designers and makers. In this context, the study proposes developing targeted skills programmes, emphasising quick wins and structure to define and deliver quality skills-based learning. International partnerships can also reinforce best practices and encourage long-lasting partnerships across traditional geographic boundaries.

On the **labour market matching** side, the lack of information on available courses (and their quality), alongside the lack of a sector-led approach to career development and recruitment, means that neither industry nor skills providers are sure of the quality of skills on offer from potential employees (or creative talent). A dedicated programme for promoting creative skills and publicising employment opportunities would help to build a network and possibly also a database approach to match skills needs with talent and identify skills gaps as they arise.

On the **labour demand** side, key creative businesses can play a leading role in developing and establishing a skills matching platform in Nigeria. Building professional networks and creative hubs (where creative businesses collaborate and are supported in terms of skills and entrepreneurship) can facilitate greater knowledge sharing and build a community of practice, through which both formal and informal continuous professional development can take place. Another recommendation that emerged from the study relates to internships, which are currently mostly informal and unpaid in Nigeria. They tend to reinforce the lack of structure and professionalism. It is therefore suggested to carry out pilot internship programmes with stakeholders from universities and industry.

At the **framework conditions** level, access to relevant and high-quality data remains one of the biggest challenges for informed policy-making. The study recommends to develop data collection strategies to create mechanisms that can work with private, public and third sector stakeholders.^[69]

GFA & FAKT 2022 'Employment and Labour in the Creative Industries Nigeria'

International DC organisations seeking to learn more about the employment and labour situation in the CCI in Nigeria can find the entire study [here](#).



4. PARTNER MANAGEMENT

4.1 IDENTIFICATION OF RELEVANT PARTNERS

Creative Economy – A multi-actor landscape

The stakeholders and partners in the CCI are diverse, spanning multiple sub-sectors and value chains. As a result, CCI actors can contribute to learning, innovation and organisational change in other industries as well. Depending on the goal of the projects, the integrated stakeholders may vary greatly, ranging from international DC organisations, policy-makers, financial institutes, companies, technology centres, research facilities, universities, chambers, business development organisations, export agencies, accelerators, incubators, hubs and festivals, with varying interests.

Stakeholders can also be entire clusters bringing together various actors. The growth of creative clusters in urban areas has been particularly important; in stimulating interest, in utilising cities' creative resources for urban development, and in attracting and retaining talent. This points to the crucial role that stakeholders play at city level. In addition to viewing the CCI as an economic subset of businesses, intermediaries, policy-makers and other actors, creativity can also be seen as an element of the overall economic innovation system. The CCI is at the centre of a network of connections to other actors and sectors. It is therefore important that international DC organisations involved in the promotion of creative industries understand the CCI's role in the larger economy, and that knowledge and experience must be combined between actors and across sectors to achieve greater impact.

Stakeholder engagement in the CCI often involves a set of unique characteristics and considerations compared to other sectors:

- **Creative projects are often subjective, driven by artistic vision, and may not have easily quantifiable metrics for success. Engaging stakeholders in the CCI involves navigating diverse perspectives and balancing artistic freedom with stakeholder expectations.**
- **Stakeholders in the CCI can be diverse, including artists, designers, clients, audiences, critics, companies, policy makers and the general public. Each group may have unique expectations and interests, and effective engagement requires understanding and addressing these varied perspectives.**
- **Creative projects are dynamic, and the industry is known for its constant evolution. Stakeholder engagement strategies need to be adaptable and responsive to changes in trends, technologies, and audience expectations depending on the sector that is addressed.**

How to identify partners in the CCI?

International DC organisations looking to engage in the CCI can identify local, national, regional, or international partners for collaboration. Additionally, the establishment of strategic partnerships, such as the collaboration between GIZ and Goethe-Institut for the implementation of the Global Project CCI (see chapter [4.2. Successful Examples of Partnerships in the CCI](#)) can be initiated. To pinpoint the appropriate stakeholders promoting the CCI, it is imperative to first delineate the system boundaries (see chapter [3.1. Defining the System Boundaries](#)). This involves identifying the project's focus (e.g., job and income promotion, private sector development, digitalisation, education), the sub-sectors, regions, and countries to be involved, as well as the target groups. Identifying partners in the CCI necessitates a strategic and deliberate approach. International DC organisations can employ various tools and outreach methods to identify suitable stakeholders. When commencing a new project, participation in industry events, conferences, workshops, and networking functions is advisable. These events provide opportunities to meet potential partners, gain insights into their work, and establish connections within the CCI. Several online platforms dedicated to the CCI, such as professional networking sites, forums, and social media groups like LinkedIn, Behance, or industry-specific forums, can also be valuable for connecting with potential partners. Collaborating with creative hubs, incubators, and co-working spaces, which often attract a diverse range of creative professionals, provides an additional avenue to tap into relevant networks. Development practitioners may also leverage their existing networks and seek recommendations from colleagues, friends, or industry contacts, as personal recommendations

often lead to valuable partnerships. Once potential partners are identified, international DC organisations can use stakeholder maps as a tool to delineate relevant stakeholders and understand the interactions, relationships, and potential conflicts among them. In addition, tools such as the ‘Guide for Mapping the Entrepreneurial Ecosystem’ (see chapter [3.2.1. Ecosystem Mapping](#)) which place a particular emphasis on identifying the interdependencies between actors, can be used to analyse the relations and conflicts between stakeholders. Stakeholder theory posits multiple links in relationships and underscores the need to enhance the value of each stakeholder group without diminishing the value of one group relative to another to avoid trade-off situations. In this context, regular stakeholder and partner engagement becomes a crucial management tool to pursue a shared vision and ensure that value is created for each actor.^[70] Various tools for stakeholder engagement, including workshops, surveys, emails, newsletters, and customised software for stakeholder relationship management, can be employed depending on the scope of engagement.

Important actors in the CCI

As previously underscored, the CCI encompass a diverse array of participants across multiple sectors. Prominent multinational organisations such as UNESCO, UNCTAD, the OECD, and the World Bank/IFC play significant roles in shaping the global landscape of the CCI. At the international cooperation level, bilateral organisations like GIZ, the Agence Française de Développement (AFD), the Swedish International Development Cooperation Agency (SIDA), and the United States Agency for International Development (USAID) actively contribute to CCI development in the countries of the Global South.

State-funded cultural entities, including the British Council and the Goethe-Institut, with mandates to foster cultural relations and educational opportunities for their respective nations, have longstanding involvement in supporting the CCI in partner countries. For international DC organisations initiating new projects, it is crucial to identify synergies with these organisations from the outset. This facilitates coordinated actions, mobilisation of funding, and the attainment of more substantial impact.

Additionally, there are significant actors operating at the macro, meso, and micro levels. However, due to the variability contingent upon the specific country context, they are not individually specified in the subsequent discussion.

At the macro level of the CCI, various actors play pivotal roles in shaping and influencing the overarching policies, frameworks, and conditions that impact the creative sector on a broad scale. These include government agencies and ministries and regulatory authorities responsible for instance for media broadcasting but also IP. These also include agencies focused on economic development that often provide support and funds for cultural and

creative professionals, practitioners and entrepreneurs. Another actor important to mention are statistical institutions. A positive example to highlight in this regard is the South African Cultural Observatory (SACO). Initiated by the Department of Sports, Arts & Culture, the South African Cultural Observatory is ‘a statistical and socio-economic research project, launched in 2014, which charts the socio-economic impact of the arts, culture and heritage sectors and the CCI in South Africa.’ The key functions of the SACO include, among others, advanced theoretical and policy-relevant research on cultural trends and the cultural economy, the conceptualisation and collection of statistics (data-bases), and monitoring and evaluating the impact of cultural events.

At the meso level of the CCI various organisations play crucial roles in supporting and shaping the industry (see chapter [5.4. Approaches on the Meso-Level for examples of meso-level organisations](#)). These meso-level organisations often act as intermediaries, facilitators, and advocates for the CCI. For instance, hubs and incubators provide physical spaces, resources, and support services for emerging creative talents and start-ups. They offer a collaborative environment, mentorship, and access to networks, fostering innovation and entrepreneurship in the CCI. Associations and chambers specific to the CCI represent the interests of professionals within the industry. They often organise events, advocate for policies supporting the sector, and provide networking opportunities for businesses and individuals. Networking platforms such as festivals bring together professionals, organisations, and stakeholders in the CCI. These platforms create opportunities for collaboration, partnerships, and knowledge exchange, contributing to the growth of the industry.

At the micro level of the CCI, individual actors play pivotal roles in shaping and contributing to the vibrancy of the sector. These micro-level actors are the creative individuals, artists, and entrepreneurs who are directly involved in producing, showcasing, and disseminating creative products and services.

However, as CCI spans different sectors, organisations and actors from other sectors also play a crucial role in strengthening the CCI as a whole. When engaged effectively, successful partnerships can materialise and have a significant impact, as demonstrated by the intra-ministerial collaboration between the Kenyan Kenya Bureau of Statistics and the Kenya Film Commission, which also involved stakeholders from the ICT sector. This collaboration aimed to enhance the statistical data of the film industry to facilitate informed policy-making (see chapter [5.3.1. Using Statistical Data of the CCI for Informed Policy-Making](#)). Nevertheless, a considerable number of stakeholders from other sectors remain unaware of their roles within the CCI. As highlighted in the Kenyan example, the CCI pertains not solely to the Ministry of Culture but should also be a significant consideration for ministries associated with economic development, digitalisation, employment, education, and other pertinent areas. Hence, it is imperative that international DC organisations not only promote cross-sector partnerships,

but also raise awareness at a broader stakeholder level and encourage participation in the CCI and its impacts on economic, environmental and socio-cultural development.

4.2 SUCCESSFUL EXAMPLES OF PARTNERSHIPS IN THE CCI

Illustrations of numerous potential partnerships within the CCI

Given the cross-sectoral scope of the CCI, the establishment of partnerships is crucial to attain the desired impact. These partnerships can manifest at various levels, encompassing actors at the global, macro, meso, and micro levels. For instance, collaborations may occur between creatives and businesses within a specific sector or extend across sectors to foster innovation. They may also emerge between state agencies of different ministries. Furthermore, partnerships can extend to the international level, involving multilateral or bilateral organisations, such as demonstrated by the Creative Economy Alliance (described in the following section), among others. These collaborations can occur at local, national, regional, or international scales. It is essential to acknowledge that partnerships in the CCI are multifaceted, spanning across sectors, levels, and geographical regions.

There are many more partnership models that are worth mentioning. Below, a few have been highlighted to demonstrate the scope and reach of partnership models in the CCI:

An exemplary instance of successful collaboration on both multi-national and bilateral fronts is the UNCTAD 'Creative Economy Network' (CEN). Positioned as one of the foremost platforms for disseminating resources and information related to the global creative economy, the CEN aims to foster networking among collaborators and facilitate the seamless exchange of open-source information and opportunities. Another noteworthy initiative along similar lines is the 'Creative Economy Alliance' (CEA), recently launched by the World Bank ('Solutions for Youth Employment') and GIZ, with a specific emphasis on diversity and youth. The primary objectives of the CEA is to champion global cooperation, serve as a platform for the exchange of knowledge, experiences, and ideas, and formulate solutions to support the Creative and Cultural Industries (see chapter [5.2.1. Building Global Advocacy Networks for the CCI for detailed information](#)). Likewise, the collaboration between the International Trade Centre (ITC) and GIZ in conceiving the SheTrades Accelerator Programme serves as another successful example of a global multi-/bilateral partnership. Employing a comprehensive, dual-pronged strategy, SheTrades enhances the competitiveness of women-led businesses in

the apparel, accessories, home décor and jewellery industries, by creating market and business opportunities. The programme also provides training to local business support organisations to establish sustainable support structures for women entrepreneurs.

In other cases, cross-sectoral exchange and partnerships have proven to be crucial for harmonising approaches at a global level. For instance, achieving a standardised monitoring system for the impact of EU-funded projects in the CCI continues to be challenging due to differing definitions of the CCI and organisational objectives. Thus, within the EU Practitioners' Network taskforce on CCI international cooperation, stakeholders and cultural institutions exchanged on methods and unifying indicators for EU-funded projects in the CCI. The outcome of these discussions underscored the necessity for minimal standardisation of indicators, to ensure cohesive and impactful advocacy for the sector.

One particular success at the policy level is the collaboration between the Kenya National Bureau of Statistics, operating under the Ministry of Information, Communications and the Digital Economy, and the Kenya Film Commission, operating under the Ministry of Youth Affairs, Creative Economy and Sports. This partnership aimed to enhance the capacity of both organisations in collecting, analysing, validating, and utilising statistical data for the film industry, thereby facilitating informed policy-making (see chapter [5.3.1. Using Statistical Data of the CCI for Informed Policy-Making](#)).

Another noteworthy success is the 'Drone Divas' programme, a partnership conducted within the Global Project CCI between an intermediary organisation and the private sector. This initiative seeks to fortify technical and entrepreneurial skills among disadvantaged women in the drone industry, creating enhanced opportunities for income and employment through collaboration with the private sector for internship placements (see chapter [5.5.2. Integrating Job Placement Opportunities in Training Interventions](#)). It not only underscores how intermediaries with diverse sector focuses can unite to bolster essential skills for the CCI, but also emphasises the critical role of partnerships in addressing structural challenges faced by marginalised groups.

GIZ and the Goethe-Institut – A strategic global partnership

At a bilateral and strategic level, an exemplar of successful partnership is the collaboration between GIZ and the Goethe-Institut for the Global Project CCI. The lessons derived from this collaboration can offer valuable insights for other international DC organisations or entities engaged in the joint implementation of large-scale projects.

The primary objective of the Global Project CCI is to enhance the income and employment prospects for cultural and creative professionals, with a specific emphasis on women's support.

Notwithstanding the distinct approaches pursued by the two organisations involved – GIZ is mandated to promote international cooperation for sustainable development and international education work, whilst the Goethe-Institut promotes cultural exchange, education, and social discourse on a global scale – both entities contributed their unique strengths to the partnership.

The Goethe-Institut, maintaining a continuous presence in its partner countries, evinces extensive networks with cultural organisations, collectives and professionals in the CCI. Linking up with these networks, it initiates training programmes for skills development, facilitates intercultural discourse, and orchestrates events and festivals to showcase cultural diversity. These initiatives are designed to directly benefit cultural and creative professionals, practitioners and entrepreneurs. Conversely, GIZ brings extensive experience in capacity development at the meso and macro levels within partner countries' systems, focusing on the development of sustainable initiatives and structures. It is also permanently represented in partner countries, collaborating with various organisations to enhance their service and program portfolios for beneficiaries and partnering with policy-makers to create conducive frameworks.

The fact that each organisation works at different levels facilitated a clear delineation of tasks in the implementation of the project. Both organisations collaborated strategically to ensure a comprehensive project execution: workshops were conducted at the initiation of the project in each partner country to cultivate a mutual understanding of each other's mandates and to jointly develop the results impact model and project indicators. This facilitated ongoing monitoring and assessment of achieved milestones and identified areas requiring further attention. The discussions also led to the development of a shared online monitoring tool to measure the projects' impact (see chapter [6. Monitoring & Evaluation](#)). Annual joint operational planning workshops were hosted to outline actions for the upcoming year.

Implementing the project posed challenges arising from the distinct organisational mandates, structures, strategies, and intervention logics of the two partners. Consequently, regular communication channels were set up at both strategic and operational levels to ensure a shared understanding of each entity's mandate and to address challenges arising during the partnership. Regular exchanges took place between the respective project management staff at headquarters to ensure holistic implementation of the programme. In-country staff overseeing the implementation itself were involved in these dialogues as required. Local dialogue formats were also implemented between GIZ and Goethe-Institut staff in partner countries. Although it was not formally part of this project, experience demonstrated it would be advisable to organise a joint kick-off workshop involving both local and head office staff.

While the Goethe-Institut concentrated mainly on interventions targeting creative professionals, it necessitated substantial interaction with organisations operating at the meso level responsible for executing activities for the ultimate beneficiaries. These meso-level organisations were the

primary focus of GIZ interventions. One valuable lesson learned from this experience underscores the significance of early clarification of the choice of partner organisations involved and targeted through the project, and the roles in approaching these organisations. To facilitate this, a workshop is recommended at the project's inception to create a comprehensive overview of stakeholders and identify potential strategies for capacity building.

Due to the collaboration between two distinct organisations in the implementation of the project, it is recommended to establish a shared identity for the project, possibly through the creation of a project brand or logo, to ensure recognition by the target audience. This necessitates the development of robust communication processes, taking into account the divergent procedures and approval requirements of both entities – GIZ and the Goethe-Institut. Examples include the placement of logos, the press release process, among others. Such measures ensure that communication with the target group and other stakeholders is standardised, maintaining consistency and adherence to a unified procedure.

Overall, in any partnership involving two organisations, it is critical to clearly define and adhere to specific processes and roles. This clarity is essential to prevent confusion among partners and the target group and to facilitate the seamless implementation of the project.

In summary, both partners contributed essential expertise and networks, rendering the partnership distinctive and successful:

- **The Goethe-Institut served as a partner with in-depth knowledge of the CCI in the partner countries.**
- **GIZ demonstrated profound expertise in technical cooperation and systemic capacity development.**
- **Maintaining a stable local presence, both GIZ and the Goethe-Institut possessed long-standing partner contacts and networks that spanned all levels, encompassing macro, meso, and micro levels.**

5. APPROACHES TO STRENGTHEN THE CCI

5.1 SCOPE AND INTRODUCTION

As emphasised above, international DC organisations aiming to enhance the CCI in their partner countries can adopt various approaches. The choice of approach depends on the project's sector focus and the envisaged impact, such as job and income promotion, private sector development, digitalisation, education, or financial system development.

The approaches outlined in the subsequent chapters are flexible and can be selected and replicated by international development organisations based on their priorities. They span over:

1. Different sectors

- Film (see approach [5.3.1. Using Statistical Data of the CCI for Informed Policy-Making](#))
- Music (see approach [5.4.4. Building Multidisciplinary Incubators for CCI Professionals, Practitioners and Businesses](#))
- Graphic design (see approach [5.5.1. Integrating Soft Skills in CCI Technical Professions](#)), among others.

2. Different focus areas

- Job and income promotion (see approach [5.5.2. Integrating Job Placement Opportunities in Training Interventions](#))
- Private sector development (see approach [5.4.4. Building Multidisciplinary Incubators for CCI Professionals, Practitioners and Businesses](#))
- Digitalisation (see approach [5.5.4. Strengthening Digital Skills for the Design Sector](#))
- Education (see approach [5.5.1. Integrating Soft Skills in CCI Technical Professions](#))
- Financial system development (see approach [5.4.3. Improving Access to Finance through Intermediaries](#)), among others.

3. Intervention level

- Global (see approach [5.2.1. Building Global Advocacy Networks for the CCI](#))
- Macro (see approach [5.3.1. Using Statistical Data of the CCI for Informed Policy-Making](#))
- Meso (see approach [5.4.1. Strengthening Intermediaries of the CCI](#))
- Micro (see approach [5.5.3. Developing Awareness Campaigns on Issues Relevant to the CCI](#))

Given that these approaches were largely piloted within the framework of the Global Project CCI, with a specific focus on job and income promotion, most approaches directly and indirectly contribute to this overarching goal.

To facilitate the use of these approaches, they have been classified according to their intervention level (global, macro, meso, or micro) in the following sections, providing development practitioners with an easily navigable guide.

5.2 GLOBAL APPROACHES AND NETWORKS

5.2.1 BUILDING GLOBAL ADVOCACY NETWORKS FOR THE CCI

Approach in Brief

The economic impact of the CCI continues to play a subordinate role in national policy dialogues and discussions, due to lack of comprehensive knowledge and data that would enable intermediary organisations to make the case for the CCI. To address this gap and enhance sector visibility, the 'Creative Economy Alliance' (CEA) was established by the World Bank's 'Solutions for Youth Employment' programme in collaboration with the GIZ Global Project CCI. The CEA focuses on promoting diversity and youth, aiming to foster global cooperation, facilitate knowledge exchange, and find solutions to support the CCI.

Objective of the Approach

The approach aims to develop a network and platform of CCI organisations, and a knowledge repository, by:

Identifying global organisations active in the CCI;

Stimulating the knowledge and experience exchange;

Collecting knowledge and best practices and sharing them on a platform;

Raising awareness through events that can bring to the fore more community-oriented issues and ideas.

Target Group & Partner Set-up

The identified target group for this approach encompasses:

- a. National and international intermediary as well as DC organisations (e.g., OECD, UNESCO, UNCTAD, etc.) active in the CCI;
- b. Indirectly policy-makers that are engaged in a dialogue with these organisations based on the experience and knowledge gained and shared as part of the network.

Detailed Description of the Approach

The economic significance of the CCI has been inadequately represented in national policy dialogues, primarily due to a dearth of data and advocacy efforts at both local and interna-

tional levels to influence these discussions. To address this deficiency, the Global Project CCI, mandated to promote international networking and the exchange of experience and knowledge among organisations in the CCI sector, engaged in dialogues with various international DC organisations, including the OECD, UNESCO, UNCTAD, the British Council, and the World Bank to explore the potential establishment of an international network. During these consultations, it was agreed not only to create an online knowledge repository, a need identified by the World Bank, but also to initiate a comprehensive network. Subsequently, a concept was devised for the establishment of the 'Creative Economy Alliance for Diversity and Youth Employment', aligning with GIZ's emphasis on gender equality and the World Bank's focus on youth employment, reflecting the respective mandates of both organisations.

The CEA's objectives include:

- a. Developing solutions to promote youth employment and diversity in the CCI;**
- b. Sharing knowledge and best practices to facilitate evidence-based decision-making among CCI funders;**
- c. Actively listening to the voices of young creatives from diverse backgrounds and genders to provide demand-driven support aligned with emerging trends in the CCI.**

The concept was officially presented at a kick-off event, where interested national and international intermediary and DC organisations expressed their interest in joining the network. Post-launch, the CEA collaborated with various partners to publish reports, host regular events on pertinent topics such as web3, NFTs, and gender equality, fostering knowledge creation and exchange. Furthermore, partners contributed knowledge repositories for specific CCI topics based on their experiences. These were integrated into the knowledge repository platform facilitated by the World Bank.

To ensure strategic management, a secretariat was established, conducting informal working meetings weekly and strategic meetings between the World Bank and GIZ every six weeks. A monthly newsletter is distributed to keep members and other interested cultural and creative professionals and practitioners informed.

Results & Impact

The CEA is the first of its kind to bring together various national and international intermediary and DC organisations, to collect and disseminate knowledge and increase the visibility of the sector. With a particular emphasis on youth and gender, the CEA informs about critical

aspects of the CCI and creates general awareness. The events attract a substantial audience, with around 300 participants in the launch event of the CEA.

Critical Reflection

The establishment of the Creative Economy Alliance is a joint effort by different organisations that have provided experts and human resources for its establishment without having a clear mandate to build such an alliance as part of their projects. International DC organisations wishing to replicate the network approach should ensure that the establishment of a network is a central objective of the project and is reflected in the indicators to ensure commitment and sufficient resources for the operation of the network. In addition, the long-term sustainability of such a network should be considered from the outset. In this context, a clear membership structure (e.g., based on a fee structure) should be thought through. The voluntary commitment of members sustains the network for now, but a strategic approach is vital for prolonged success. Even though the World Bank will continue to run the CEA for the time being, long-term sustainability is not yet assured. International DC organisations wishing to establish a network should bear in mind that operating a secretariat demands significant time and personnel resources, necessitating careful planning for future initiatives of a similar nature.

5.3 APPROACHES ON THE MACRO-LEVEL

5.3.1 USING STATISTICAL DATA OF THE CCI FOR INFORMED POLICY-MAKING

Approach in Brief

One of the primary challenges at the policy level persists in obtaining comprehensive data for informed policy-making. While some of the countries have already initiated projects to support better data collection for the CCI such as the South African Cultural Observatory in South Africa (see chapter [4. Partner Management](#)), others continue to lack such structures. This challenge is primarily attributed to the informal nature of the sector, the intricate categorisation of the CCI, inadequate capacity and sensitivity to collect disaggregated data and a general lack of awareness regarding the economic significance of the sector.

To address this gap, a collaborative approach was devised by the GIZ Project ‘Strengthening the Film Industry in Selected Countries in Africa’ in partnership with the Kenya Film Commission and the Kenya Bureau of Statistics. This approach focuses on enhancing the state agencies’ respective capacities to collect, analyse, validate, and utilise statistical data specific to the film industry. The ultimate objectives are to provide political decision-makers with

insights into the economic impact of the film industry, its corresponding requirements, and formulate effective measures for promoting the sector.

Objective of the Approach

The approach endeavours to enhance evidence-based decision-making in advancing the film industry, by:

Cultivating a comprehensive awareness regarding the imperative of data collection for the film industry;

Developing mechanisms to foster inter-ministerial coordination and cooperation in the data collection process;

Providing assistance to pertinent public institutions, such as the Bureau of Statistics, in developing methodologies and systems for the routine collection, analysis, validation, and utilisation of data;

Instituting a Film Industry Satellite Account (FISA) complemented by a comprehensive report.

Target Group & Partner Set-up

The identified target group for this approach encompasses:

- a. Two state agencies, specifically the Kenya Bureau of Statistics and the Kenya Film Commission;**
- b. Policy-makers responsible for shaping economic development strategies, legislation and support programmes;**
- c. The beneficiaries of an increased awareness of the importance and needs of the industry, in this case cultural and creative practitioners, professionals and businesses active in the film industry.**

The Kenya Film Commission, a state agency under the Ministry of Youth Affairs, Creative Economy and Sports, operates with the vision of positioning Kenya as a global centre for film production. Its mission is to foster the development of a dynamic and sustainable local film industry while promoting Kenya as a premier filming destination, thereby contributing to economic growth and job creation.

Detailed Description of the Approach

The Kenya Film Commission was established in 2005 to promote Kenya as a film industry hub. In addition to various strategic objectives, it advocates for a favourable political and legislative environment for the film industry. However, due to a lack of data, it is difficult for the agency to highlight the importance of the Kenyan film industry. This is a common challenge for many countries, as inconsistent data sets and methodologies impede informed policy-making. While international DC organisations have attempted to address these issues through sporadic studies that present only a momentary picture and are not regularly repeated, there is a lack of systematic support, leading to an inability for policy-makers to routinely collect, analyse, validate, and utilise data.

To bridge this gap, GIZ collaborated with the Kenya Film Commission and the Kenya Bureau of Statistics to form a working group. The objective was to establish a Film Industry Satellite Account and develop a management information system, enabling regular provision of data for informed policy decisions. The initial challenge for the working group was twofold. The film industry value chain consists of four main processes:

a. Development:

an upstream process that includes script development, financing, location scouting, talent scouting, recruitment and management. In a broader context, Development might be taken to include grassroots talent development and upskilling, such as film schools and talent labs.

b. Production:

in general, the shooting of the film and any ancillary content, led by the producer and director, and worked on by the cast (actors) and crew.

c. Post-production:

which includes editing, visual effects (VFX), sound design, mixing and mastering, and musical scoring. Post-production is often classified under the IT sector, given the intensive application of digital technologies throughout the process.

d. Distribution of the film material:

which includes film festivals, cinema releases, online streaming platforms, and DVD/Blu-Ray sales.

However, in most contexts the film industry is included under the broader classifications of entertainment or broadcasting, which represents only a fraction of the overall film industry. It is therefore difficult to collect data on the film industry.

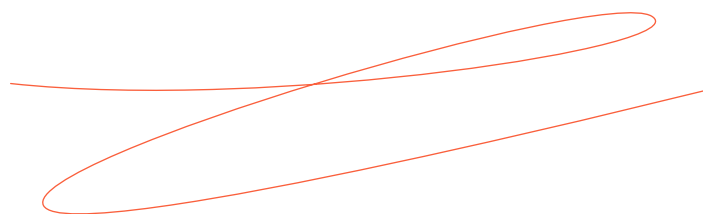
The second challenge involved garnering support from relevant stakeholders, especially ministries, for investing in data collection; this necessitated consistent lobbying and advocacy efforts. GIZ worked with the Kenya Film Commission in consolidating compelling arguments to bolster ownership among key actors. To surmount data collection challenges, methodologies from other countries were studied, leading to the development of a calculation in collaboration with the Kenya Bureau of Statistics. A Film Industry Satellite Account was subsequently established, accompanied by a survey of selected companies across the film value chain. To this end, several workshops were conducted across the country to collect and validate data and refine the methodology through iterative processes. The initial results underwent peer review by various stakeholders, including the World Bank, ensuring data relevance and credibility before being published as a study. The long-term objective is to establish a publicly accessible database, providing pertinent data to stakeholders and policy-makers with interest in the Kenyan film industry.

Results & Impact

The sustained advocacy efforts have yielded a heightened awareness of the film sector's significance, coupled with a collaborative initiative to systematically gather data and establish an information management system. The data emanating from this system will serve multiple purposes: it will underscore the sector's economic importance, facilitate the analysis of interventions like the Film Fund, offer substantiation for necessary policy measures, and shed light on working conditions, particularly the sector's informality. Furthermore, the data will spotlight the global standing of the Kenyan film sector and quantify the balance between local narratives and international content. Ultimately, this comprehensive dataset will act as a continual reference for the government, aiding in the formulation of effective and informed policy decisions.

Critical Reflection

The development of data-driven management systems is a complex and time-consuming endeavour, involving multiple iterations in refining methodologies and handling data intricacies. A lack of awareness of this process may contribute to waning enthusiasm over time. International DC organisations aspiring to replicate this approach are therefore recommended to formulate a communication strategy from the outset. This strategy should aim to foster awareness about the inherent challenges and time-intensive nature of data collection and analysis, thereby managing expectations and sustaining commitment throughout the process.



5.4 APPROACHES ON THE MESO-LEVEL

5.4.1 STRENGTHENING INTERMEDIARIES OF THE CCI

Approach in Brief

Intermediaries within the CCI play a crucial role in providing services and networks to cultural and creative practitioners, professionals, and businesses. They are the crucial link between the product or service and its successful market launch. However, the intermediary sector in sub-Saharan Africa's combined CCI appears sparse and lacks coordination. There is a lack of research-based knowledge concerning the identity and services of existing intermediaries, including insights into their requirements for support for their effective visibility in both local and international markets. Frequently, intermediaries are missing from the value chain entirely, struggle to establish themselves in the industry and reach their intended audience with the necessary services. Moreover, in the relatively nascent digital CCI, intermediaries differ from organisations or institutions commonly observed in more established sectors. Instead, they are frequently individuals seeking to fulfil a specific role and bridge a gap, deviating from the conventional value chain approach.

To address the knowledge gap regarding intermediaries in the digital CCI, a collaborative approach for strengthening the intermediary sector with a specific focus on digital arts such as animation, gaming, and VR/XR, was developed with the University of the Witwatersrand (Wits) and the [Fak'ugesi Festival](#) in South Africa. The approach's main objective was to fortify intermediaries operating within the digital CCI. This goal was realised through active support for the Fak'ugesi Festival, leveraging its extensive reach and network across the continent to identify individuals, organisations, companies acting as intermediaries to develop a platform for them to convene and promote their services.

Concurrently, the approach sought to generate research-based insights into the needs of intermediaries and the beneficiaries of their cultural services. This comprehensive understanding sought to identify gaps in the value chain. By adopting this dual-pronged strategy, the approach aimed to elevate the visibility and quality of intermediary services within the sector, facilitating more targeted and informed support for the sector in the future.



Objective of the Approach

The approach seeks to fortify intermediaries operating within the digital CCI, with a particular focus on animation, gaming and VR/XR, by:

Enabling key actors to understand their pivotal role in enhancing access to services and markets for cultural and creative practitioners, professionals, and businesses through a thorough analysis of critical gaps in the value chains;

Establishing a multi-stakeholder platform and an aggregator for both intermediaries and the users of their services;

Cultivating a shared language within the sector regarding the essential role of intermediaries and their services;

Promoting visibility for intermediary services and the sector, targeting both users and policy-makers with a more comprehensive understanding of the services landscape;

Assisting intermediaries in devising strategies for more effective market positioning;

Formulating training approaches tailored for intermediaries, with the aim of enhancing services and facilitating improved access to services for practitioners within the CCI.

Target Group & Partner Set-up

The identified target group for this approach encompasses:

- a. An intermediary aggregator, the Fak'ugesi Festival, which serves as a convergence point for stake-holders in the African cultural, creative, and technology industries, specifically within the digital creative arts sector;
- b. African intermediaries and service providers offering their services to cultural and creative practitioners, professionals and businesses;
- c. The beneficiaries of these services, comprising cultural and creative practitioners, professionals and businesses.

Established in 2014, the Fak'ugesi Festival is a component of the work of the Tshimologong Precinct, a collaborative endeavour between Wits' Joburg Centre for Software Engineering, with a mission to propel digital innovation, and the Wits School of Arts' Digital Arts Department. The festival draws robust support from the industry connections of the Tshimologong Precinct and benefits from the academic perspective of the Wits School of Arts. The tripartite alignment involving industry, academia, and the public sector has been instrumental in realising the objectives of the approach.

Detailed Description of the Approach

The Fak'ugesi Festival has built a reputation for fostering networking and promoting innovation within Africa's digital art scene. This annual event not only facilitates the establishment of new connections but also provides a platform for creative and cultural professionals, practitioners, and businesses to showcase their products and services to both African and international delegates.

GIZ's collaboration with the festival commenced during the pilot phase of the Global Project CCI, initially focusing on audience development and communication support for the festival. GIZ then engaged with the festival organisers to evaluate their mandate and role in the CCI ecosystem from a development perspective, emphasising jobs and income creation.

While the festival serves as a gathering for cultural and creative professionals, practitioners and businesses, a notable aspect is the absence of those who identify solely as intermediaries. Thus, in 2021, with additional COVID-19 funding, a bootcamp was designed to develop tailored trainings for CCI professionals performing intermediary functions in the digital art space. The online bootcamp was promoted widely to attract as many CCI intermediaries from across the continent as possible. During the bootcamp, participants were prompted to contemplate the role of intermediaries in the digital arts scene. Learnings from this process informed the subsequent research.

Leveraging the existing networks of the bootcamp participants, and using snowball sampling, academics from Wits' School of Arts conducted research to understand in more detail the digital arts intermediary sector and the role of intermediaries in catering to creative and cultural practitioners across Africa. They soon recognised that creative and cultural practitioners, professionals, and businesses, often perform intermediary functions because there is a significant lack of intermediaries in the value chain. Subsequently, 166 intermediaries were interviewed and surveyed, mapping their services along the digital arts value chain to better understand their offerings and their needs. The resulting study highlighted a significant gap in the CCI value chain within the digital arts sector, leading the festival organisers and the Wits School of Arts to recognise the need to offer support to intermediaries so that they, in turn, can grow their businesses and create further employment.

To enhance Fak'ugesi's role, GIZ worked with the festival to develop services and networks for digital creative industries intermediaries, leading to the creation of the 'intermediaries connect' platform. This platform serves as a knowledge repository and a showcase for intermediary services. The festival has actively disseminated Wits' research findings across the continent to encourage more intermediaries to self-identify. Recognising the ongoing challenges faced by intermediaries in defining their role and services, GIZ facilitated the creation and onboarding of the initial 50 intermediary profiles onto the platform, intending these profiles to serve as references for others.

Identifying the needs of intermediaries also prompted the Wits School of Arts to collaborate with the Goethe-Institut in developing an intermediaries training programme for digital arts practitioners, piloted for three months and intended to be subsequently integrated into the school's offerings as a short course.

Results & Impact

The digital arts sector has lacked comprehensive information regarding its sub-sectors and value chain. Consequently, the research conducted by the Wits School of Arts has significantly enhanced understanding of the various sub-sectors and value chains, pinpointing crucial gaps that have hindered the sector's development across the continent. The research was also able to identify a relatively large number of producers in the digital arts sector, but only a small number of intermediaries providing services, including access to markets and finance. Thus, together with the Fak'ugesi Festival, several niche interventions to build capacity in this sector could be identified for further support.

This approach has markedly improved comprehension of the stakeholders and their roles. Among the primary actors, namely the Fak'ugesi Festival and its organisers, the Tshimologong Precinct, and the Wits School of Arts, this approach has not only contributed to a clearer understanding of their respective roles, but has also enhanced collaboration on key topics within the stakeholder group. The short-term training course and the intermediaries platform as well as established networks in the partner countries are aiding all stakeholders in fortifying their connections within the industry. The research conducted by the Wits School of Arts has provided valuable insights into the sector and its needs, enhancing overall visibility, particularly for government stakeholders and policy-makers. Fak'ugesi has used the research findings to strengthen its role and refine the festival offerings for intermediaries in the sector in its future festival planning. The impact of the intermediaries platform, still in development during the compilation of this guide, is yet to be assessed.

Critical Reflection

GIZ has collaborated with the Fak'ugesi Festival since 2019. However, due to the COVID-19 pandemic, the implementation of the approach faced significant delays. Organisations and

practitioners in the development sector looking to replicate this approach are advised to expedite contracting for grant awards in this swiftly evolving sector. However, the extensive duration of the collaboration allowed the partners to adapt and refine the approach based on insights and lessons learned during the process. Thus, it was imperative to engage in a joint strategy for a period exceeding two years. Moreover, as the approach aims to establish a network of intermediaries and promote networking among actors, it is advisable to integrate capacity-building measures to improve their networking skills from the outset and as the initiative progresses.



Photo: Fak'ugesi Festival/Zivanai Matangi

5.4.2 STRENGTHENING BUSINESS MODELS AND SERVICES OF INTEREST GROUPS AND ASSOCIATIONS IN THE CCI

Approach in Brief

Associations and interest groups play a crucial role in providing services to their members and advocating for their interests to policy-makers and other decision makers, giving their sector a collective voice. However, because CCI companies are predominantly micro or small enterprises and because membership is often optional in many countries in sub-Saharan Africa, these organisations face challenges in acquiring sufficient financial and human resources and to effectively serve their members. They also lack public funding support in general. Due to these limitations, they often lack the data necessary to quantify the needs of their members, hindering their ability to motivate for funding and adequately support their constituents. To address these shortcomings, an approach was developed to enhance the organisational capacities of voluntary membership associations, empowering them to gain a deeper understanding of their members and offer improved services. This approach was trialed in collaboration with

Animation SA, a voluntary membership association representing the animation, gaming, post-production, and visual effects (VFX) sector in South Africa. The objective was to reinforce Animation SA's internal capacity as an industry association so that they could enhance services to members and expand their visibility, and their role in advocacy and lobbying on behalf of the industry ultimately achieving sustainability through improved fundraising and membership drafting.

Objective of the Approach

The approach sought to enhance the capabilities of associations in the CCI sector, by:

- Empowering** them to better understand the needs of their members thereby enhancing access to services for cultural and creative practitioners, professionals, and businesses;
- Developing services** that assist their members in growing their businesses;
- Developing their strategy** and organisational model to ensure long-term sustainability;
- Augmenting their visibility** to policy-makers and other sector stakeholders to raise awareness of the sector's needs and offerings.

Target Group & Partner Set-up

The identified target group for this approach encompasses:

- a.** A voluntary, membership-based association, namely Animation South Africa, tasked with representing the sector and devising suitable services through a business model tailored to benefit its members;
- b.** Beneficiaries of improved services for the sector, specifically cultural and creative practitioners, professionals and businesses engaged in animation, gaming, post-production and visual effects.

Animation SA, registered as a non-profit organisation, serves as an industry association advocating for the interests of professionals in the animation, gaming, post-production and VFX sector. It provides inter alia lobbying services to improve the terms of trade for the creation, growth and sustainability of work and therefore the retention and creation of job opportunities, conducts skills development analyses to inform and in certain cases implement the development of scarce and critical skills, participates in research to inform future action, and supports its members in accessing market opportunities.

Detailed Description of the Approach

Animation SA was established as an organisation in 2006. Functioning as a volunteer-led, membership-based entity within a niche and emerging sector, it encountered financial and staffing challenges. Compounded by the lack of active promotion for certain crucial services, the organisation witnessed low membership numbers. Recognising the significance of such associations, particularly given the scarcity of organisations representing the CCI, GIZ identified that it is crucial to provide support to increase the visibility of such private sector stakeholders.

In 2019, GIZ initiated its collaboration with Animation SA during the project's pilot phase, prompted by the Gauteng Department for Economic Development's recommendation to support the organisation's growth within the South African Animation Industry. The initial support primarily focused on assessing the organisational capacity of Animation SA to cater to the sector's needs, along with conducting initial research to comprehend the state of the industry, with a specific emphasis on identifying existing and lacking skills in the sector.

In 2021, the partnership evolved on two fronts: continuing to support the development of Animation SA's services, and enhancing the organisation's internal structure to effectively provide these services. Moreover, by leveraging dedicated COVID-19 funds aimed at aiding those impacted by the pandemic, the collaboration with Animation SA resulted in the establishment of a programme to provide staffing support to animation studios facing work loss or reduced productivity due to the pandemic. This involved placing supported jobseekers and graduates in need of work experience with animation studios affected by the pandemic. The subsidised junior staff were assigned to teams to address backlogs, develop new IP, pitch bibles, whilst undertaking additional tasks to help the studios recover. In doing so the juniors gained valuable work experience, preparing them for careers in animation. Collaboratively developed application criteria for the programme, with input from studios and government training authorities, ensured early endorsement of the support mechanism. Animation SA was also assisted in augmenting its capacities to match job seekers with animation studios, providing additional human resources and legal support to programme participants, and creating communication materials to promote the programme, particularly to young women.

Participating animation studios experienced increased productivity, fast tracked IP development, business stabilisation, and job creation. The success of the initiative was documented in a video and presented to the Media and ICT Sector Education and Training Authority (MICT SETA) in South Africa for potential inclusion in their support programmes to bridge the gap between job market supply and demand in the sector. At the time of compiling the guide, the discussions were ongoing.

Concurrently, alongside the programme implementation, GIZ intensified its collaboration with Animation SA to assist in building a more sustainable and effective organisation while

enhancing its service offerings. Initial support involved data collection through member surveys, contributing to a heightened awareness of ecosystem needs. Based on the research findings and capacity challenges encountered during the programme implementation, Animation SA's organisational model underwent refinement, including board structure, sustainability strategy, communications, data and finance policies, and service offerings. Services were bundled into several categories, e. g., 'Market Access', where Animation SA assists members in securing incentives from the Department of Trade and Industry for international trade missions. Simultaneously, Animation SA was supported in establishing an industry database with core information on studios and their competencies, improving reporting on industry needs and capacity for fundraising. A holistic communication strategy was developed to boost the association's visibility, resulting in a significant increase in social media followers – the first step towards increases in paid membership.

Organisational development support capacitated Animation SA to devise a long-term sustainability strategy, identifying alternate revenue sources to help them to continue to provide and enhance relevant services to their members.

Results & Impact

The initiation of the financial support programme for animation studios not only directly influenced employment by successfully pairing 59 job seekers with 23 studios but also played a pivotal role in enhancing Animation SA's capacity to function as an intermediary between its studio members and the labour market. This, in turn, bolstered the overall service offerings of Animation SA. Active involvement of government stakeholders from the programme's inception in formulating selection criteria, documenting its success, and sharing results with the government initiated a dialogue on the potential inclusion of the programme in the MICT SETA support portfolio. Additionally, it heightened the government's awareness of the skill requirements within the animation sector and facilitated more regular communication between Animation SA and government stakeholders.

By directly strengthening the organisation's capacity and to collect data, conduct analysis, and expand service offerings, Animation SA successfully developed and communicated improved services to its members. Consequently, Animation SA's social media presence experienced a substantial surge, increasing from 2,000 to 150,000 followers within a single year.

Critical Reflection

The initial engagement with Animation SA between 2020 and 2024 was centred around the Covid Relief Fund. Due to the need to allocate funds swiftly a holistic strategy, especially concerning the organisation's capacity-building needs, could not be formulated at that time. This aspect was only addressed later when a more holistic approach to the organisational development of Animation SA was devised. Furthermore, the subsequent capacity development

strategy took into account the organisation as a whole but overlooked individual representatives within the organisation who lacked essential tools, such as monitoring and evaluation frameworks. Consequently, it is recommended that international DC organisations seeking to replicate this approach should establish a holistic capacity development strategy from the outset, encompassing measures not only at the organisational level but also at the individual level.



Photo: GIZ/Ellis & King

5.4.3 IMPROVING ACCESS TO FINANCE THROUGH INTERMEDIARIES

Approach in Brief

Securing funding for content production studios to finance their projects remains a significant challenge across the sector. Intermediary organisations within the cultural sector, such as associations, chambers, and networks, provide valuable services to cultural practitioners and professionals. However, despite their efforts, effectively leveraging their networks to assist members in accessing funding for their projects remains a persistent challenge. This is especially notable in the animation sector. To address this challenge, a collaborative approach was devised in conjunction with the Durban FilmMart Institute (DFMI): a non-profit company dedicated to promoting local and international trade and investment in African film. The project goal was to improve access to funding for animation producers. This approach was formulated with the aim of not only bolstering DFMI's role in facilitating access to finance for animation projects but also enhancing its capacity to expand the organisation's mandate within the animation sector. Additionally, it seeks to position DFMI as a platform for fostering meaningful dialogues and discussions within the animation industry in the future. The overarching aim was to raise awareness of the sector's needs, educate stakeholders, and foster

a community of filmmakers, policy makers, financiers, and broadcasters who are exploring animation as a medium.

Objective of the Approach

The approach aimed to empower DFMI in enhancing access to finance for producers in animation by:

Facilitating the development of pertinent networks comprising investors, studios, producers, buyers, and mentors;

Establishing a platform and annual competition to identify promising African animation projects;

Developing training and mentoring programmes aimed at assisting producers and directors from marginalised communities to pitch their projects to potential financiers and distributors from all over African as well as globally.

Additionally, the approach sought to fortify the overall mandate of DFMI, by:

Enabling them to facilitate regular public-private dialogues to heighten awareness of the sector's needs, thereby enhancing the effectiveness of policy-makers; and

Establishing the DFMI as a convener of such discussions that would potentially establish the DFM as relevant platform for meaningful development conversations and ultimately attract more influential delegates;

Enabling them to incorporate measures to integrate gender-related topics into their annual offerings and services.

Target Group & Partner Set-up

The identified target group for this approach encompasses:

- a. An intermediary organisation, DFMI, dedicated to foster investments in film projects, with an interest in developing the animation sector and focusing on integrating gender-related topics into its annual offerings as well as organising industry dialogues to raise awareness of the sector's needs;**
- b. Investors, distributors, financiers, producers and studios either providing or seeking funding;**

- c. **Women and their film projects seeking gender parity support;**
- d. **The beneficiaries of greater sector visibility, in this case studios, freelancers, intermediaries, government stakeholders and ultimately consumers.**

DFMI, as a non-profit organisation, specialises in facilitating local and international trade and investment in African film content. The organisation's mission is to deliver appropriate and effective programmes and services, promoting, supporting and facilitating investment in the African film industries. They aim to make African film industry professionals and products competitive and celebrated on a global scale.

Detailed Description of the Approach

DFMI, established in 2020, aims to enhance the visibility of projects originating from the African continent. The organisation seeks to create networking opportunities with potential co-producers and industry partners, stimulate the production of African content, promote international co-production ventures, facilitate access to funding for promising projects, and expedite project financing through transnational cooperation. Initially focusing on classic live-action feature film productions, DFMI recently incorporated animation into its scope at the initiation of the collaboration between GIZ and DFMI.

To reinforce DFMI's role in facilitating access to funding for animation projects, GIZ supported the launch of the 'Animation Pitch and Finance Forum,' specifically for animation productions. The training and mentorship programme includes continuous mentoring for selected projects leading up to DFMI's annual event with an opportunity to pitch their work in a forum attended by intermediaries who fund development and production as well as distributors and experienced producers. DFMI also established a comprehensive mentor network with support from the GIZ.

Simultaneously, GIZ assisted DFMI in enhancing its overall programme with a special emphasis on gender equality and the animation sector. Looking specifically at gender equality, DFMI conducted gender research to gain a deeper understanding of the needs of target groups. Gender-based challenges related to access to finance for women-led projects were documented and shared during industry dialogues, raising awareness of gender-related challenges and needs in the sector. GIZ engaged in extensive discussions with the partner to integrate gender topics effectively into their annual offerings. At the time of writing, DFMI has publicly expressed its intent to continue its animation programmes and has put out a call for animation producers to participate in the 2024 animation pitch and finance forum.

Results & Impact

The assistance provided to DFMI in creating a platform and organising an annual competition to acknowledge film projects in the animation sector has played a crucial role in facilitating access to funding for filmmakers from marginalised communities across the continent. This initiative has expanded the scope of DFMI's work as well as its sphere of influence, as animation productions and industry dialogues were not previously a focal point for the organisation. In its inaugural year, twenty producers and directors benefited from the 'Animation Pitch and Finance Forum' programme. Among the ten permitted to pitch, six successfully secured funding from investors within the first year following the programme.

Moreover, DFMI's research on gender-specific issues has contributed to a deeper understanding of the needs of women in the animation sector. The research findings have been utilised by DFMI to reinforce its role and optimise services for women in the industry.

Critical Reflection

International DC organisations should consider implementing the approach alongside a comprehensive capacity-building programme. This programme should empower the staff of beneficiary organisations to focus on the necessary elements for long-term service delivery and enhance their capacity accordingly. It is important to note that this comprehensive approach may necessitate a longer implementation timeline than initially allocated to the project.



5.4.4 BUILDING MULTIDISCIPLINARY INCUBATORS FOR CCI PROFESSIONALS, PRACTITIONERS AND BUSINESSES

Approach in Brief

While Kenya is recognised as a burgeoning entrepreneurship hub in East Africa, with numerous business incubators spanning diverse sectors such as agriculture and healthcare, there is a notable absence of organisations dedicated to supporting entrepreneurs within the CCI. This includes the music industry. Consequently, professionals within this industry face limited opportunities for skill development and networking, leading to a prevalence of do-it-yourself artists and entrepreneurs. As a consequence, the business skills within the music industry remain under-professionalised. In response to this gap, an initiative has been formulated to establish a multidisciplinary incubator named perFORM Music Incubator specifically tailored to address the needs of the music scene. This endeavour is led by Muthoni Drummer Queen, a popular Kenyan artist and founder of GoodTimes Africa, a pan-African concerts and festivals production company. The primary objective of the incubator is to facilitate collaboration among various professionals in the music industry, including artists, producers, and event managers, forming teams to develop joint projects and live shows.

Objective of the Approach

The approach is designed to establish a multidisciplinary incubator, by:

- Collaborating with local, strategically positioned music industry practitioners possessing expertise and an in-depth understanding of the local context;
- Creating a multi-stakeholder community that fosters an environment where artists can conceive, rehearse, and present finely crafted live shows;
- Developing curricula that promote interdisciplinary collaboration among a diverse array of music industry professionals; and
- Developing tools to define, measure and track professional success across various artistic disciplines and professions.

Target Group & Partner Set-up

The identified target group for this approach encompasses:

- a. An incubator, namely perFORM Music Incubator, seeking to support practitioners and professionals within the music industry in acquiring new skills and establishing live shows and projects;

- b. The beneficiaries of the music incubator, specifically practitioners and professionals, with a particular emphasis on women, within both the music industry and the CCI.**

The establishment of the perFORM incubator, supported by the Global Project CCI, represents a music business and artistic development entrepreneurship hub. Its primary focus is to empower music industry practitioners to discern, organise, refine, and master the artistic and business skills essential for constructing a sustainable music enterprise.

Detailed Description of the Approach

The concept for the perFORM Music Incubator originated in 2018 during the pilot phase of the Global Project CCI. In the initial stages, experts from the Goethe-Institut collaborated with the local industry to identify existing gaps in the CCI. At that time, GoodTimes Africa and Muthoni Drummer Queen were established partners of the Goethe-Institut in Kenya. They highlighted the necessity for an interdisciplinary incubator that would integrate various professions within the music industry, with a special emphasis on supporting women, developing skills, and refining their projects.

In Kenya, due to the absence of adequate support systems for the music industry, many musicians face challenges in building their brand. Additionally, there is a scarcity of affordable studios for musicians, leading to a prevalence of do-it-yourself artists who take on multiple roles, such as musicians, producers, and event managers simultaneously. This multitasking approach compromises the overall quality of the music and shows produced.

To address these gaps, a concept was formulated for an interdisciplinary incubator. This incubator was not only designed for musicians but aimed to benefit the entire music industry, fostering collaboration among various industry players. Seven professions relevant to the music industry were identified as the potential target group for the programme. These include: the artists themselves, artist managers, music PR practitioners, music producers, sound engineers, light engineers, and event producers. Under the guidance of Muthoni Drummer Queen and industry expert David Muriithi, curricula were developed for all seven professions. The unique feature of the programme lies in its interdisciplinary approach. While participants receive individual support, the overall programme encourages collaboration by bringing professionals together to work and think in teams. Thus, the artist always works with a colleague from another profession related to the respective field. For example, an artist might collaborate with a music PR practitioner on brand strategy. To participate in the programme, selected artists must have a project (EP/LP/Visual Album, merchandise, or costume design) planned for release within six months of completing the incubator. Working with industry professionals, including performance coaches, engineers, and music business experts, artists gain the skills necessary to excel on a global stage.

Since its inception in 2019, the incubator has undergone various phases, with the current incubation programme lasting three months. Each cohort concludes with a live show, and during the Covid-19 pandemic, the programme adapted by focusing on filmed performances presented on YouTube. While the industry as such was largely affected, this had the positive effect of giving participants a record of their work to show to booking agents and other potential employers. The original programme was later expanded to offer hands-on support to exceptional artists, producers, and managers, allowing them to train with established industry professionals and receive funding for music production, brand building, and marketing. This apprenticeship lasts one year.

To disseminate the knowledge gained from the curricula to the wider music industry, a podcast was conceived to raise awareness about the importance of artists not taking on multiple roles simultaneously. The establishment of the incubator and collaborations with renowned artists increased visibility for the music sector and ensured the incubator's sustainability. Since 2022, the incubator has received support from the Heva Fund, Africa's first dedicated funding, business support and knowledge facility for the CCI, and the British Council, financed under the ACP-EU Programme.



Results & Impact

The perFORM Music Incubator stands as a pioneering project in Kenya, bringing heightened awareness to the needs of the music industry and contributing to an elevated standard of live shows and music projects. Simultaneously, several artists have successfully developed their brand and released their music. Kabéaushe, an alternative pop and R&B musician, secured a contract with the Ugandan music label Nyege Nyege, and his new album found distribution in Germany through Monkeytown Records. Another artist, Polaris from the third cohort, collaborated with Muthoni Drummer Queen to release a song.

Over the course of the three sponsored cohorts, a total of 90 creatives from the music industry participated in the incubator, benefiting from its support to enhance their skills. The incubator has effectively established itself as a key player in the industry and operates in a sustainable manner.

Critical Reflection

The project encountered challenges in establishing a physical space during the initial phase of the incubator's development, necessitating reliance on partner spaces. International DC organisations seeking to replicate this approach are advised to concurrently establish a dedicated space, such as for rehearsals, alongside the incubator.

For the future of the incubator, it is recommended to implement a train-the-trainer approach and facilitate opportunities for knowledge exchange between seasoned and newer participants. Emphasising a six-month incubation programme, as opposed to three months, followed by a one-year apprenticeship, is considered the optimal programme duration. Consequently, international DC organisations should allocate increased budgets to support the implementation of more extended programmes.

Accreditation emerges as a crucial factor for recognising the efficacy of the training measures within the incubation programme. Certification is paramount for acknowledging these emerging professional opportunities as legitimate vocations. Therefore, involvement of accreditation bodies in the curriculum development process is essential to ensure proper recognition and validation of the programme's professional impact.



5.4.5 SETTING-UP OF ADVOCACY GROUPS THROUGH THE INITIATION OF NETWORKING EVENTS AND PUBLIC-PRIVATE DIALOGUES

Approach in Brief

In many countries of the Global South, there is a limited presence of advocacy groups representing the CCI. The existing advocacy groups are often characterised by insufficient organisation and limited capacity to effectively represent the interests of cultural and creative practitioners, professionals, and businesses. Consequently, opportunities for professionals in the CCI to engage in dialogue and articulate the sector's needs are scarce, contributing to the overall low visibility of the industry.

To address this gap, an approach was developed to establish advocacy groups by initiating regular networking events and Public-Private Dialogues (PPDs). These events aim to facilitate exchange and gather information on the sector's needs, with the long-term goal of formalising and mainstreaming these initiatives. While a partner organisation in Jordan, expressing a strong interest in representing the sector, was identified from the outset, a suitable partner could not be found in Lebanon. In response, GIZ initially planned and conducted the networking events and PPDs in Lebanon with the intention of identifying an interested organisation during the implementation phase, that would sustain the dialogues and represent the sector's interests in the long term. Furthermore, the networking events in Jordan were conducted with the understanding that the dialogues would inform the design of a Creative Council to represent the sector. This council is envisioned as part of the new Economic Modernisation Vision (EMV) introduced by the Jordanian government in 2022.

Objective of the Approach

The approach is designed to establish advocacy groups for the CCI sector, by:

Initiating and organising regular networking events and PPDs;

Identifying organisations that express interest in continuing the organisation of networking events and PPDs;

Facilitating the transformation of these organisations into advocacy groups capable of representing the sector's needs to policy-makers and other relevant stakeholders;

Providing support to these organisations in developing sustainable business models and organisational structures to ensure their continued operation as advocacy groups beyond the support provided by GIZ.

Target Group & Partner Set-up

The identified target group for this approach encompasses:

- a. An organisation, namely IDare in Jordan, with an interest in representing the sector and sustaining networking and PPDs;
- b. The beneficiaries of increased visibility of the sector: in this case cultural and creative practitioners, professionals and businesses.

IDare is an NGP established in 2013 with a focus on supporting youth development for sustainable change. Serving as a tool for empowering Jordanian youth, IDare is actively engaged in the cultural and creative fields. Notably, it hosts C-Hub, a makerspace facilitating the prototyping of ideas by designers. Collaborating with IDare to design networking events and PPDs, it was anticipated that IDare would collaborate with the yet-to-be-established Design Council to perpetuate the dialogues.

Detailed Description of the Approach

To establish advocacy groups in both countries that represent the needs of the CCI and inform policy-makers, GIZ initially sought partners in Jordan and Lebanon to conduct a series of networking events and PPDs. In Jordan, where there is a robust political vision to strengthen the CCI through a planned Creative Council under the Economic Modernisation Vision (EMV), IDare was identified as a partner organisation capable of representing the CCI not only in Amman but also in other regions of Jordan, given its nationwide operations. Six networking events and PPDs were collaboratively conducted with IDare, addressing topics such as: Women in the CCI, Dimensions and Challenges of the CCI, Gig Economy, NFTs and Entrepreneurship, and CCI Skills for the Future. In tandem with the networking events and PPDs, which included a PPD on EMV in relation to the CCI, a consultancy was commissioned to assist the government in establishing the Creative Council. This involved gathering best practices from other countries and collecting statistical data on the CCI in Jordan to make informed decisions on the Council's mandate. The results of the PPD in Jordan were consolidated in a white paper presented during a CCI Forum organised by IDare, serving as an aggregation of all PPDs to communicate sector needs to policy-makers. Collaborating with IDare and enhancing its capacity to represent the CCI in Jordan has provided a voice to the sector, strengthened the organisation's mandate, and positioned it as a suitable partner for the future Creative Council.

In Lebanon, in light of a dysfunctional political situation and organisations often aligned with political and religious interests, no partner was identified during the initial search. Consequently, GIZ opted to commence the implementation of networking events and PPDs in Lebanon, anticipating that a partner would be found during the execution of these dialogue

formats. The networking events were practice-oriented and involved policy-makers from the municipal level. During the PPDs, participants highlighted the need for a formalised CCI Council with an advocating role. To support formalisation, GIZ commissioned a consultancy firm to examine the potential mandate for the CCI Council, following the example of Jordan. While the results of the consultancy assignment were not available at the time of compiling this guide, several other international DC organisations, including UNESCO, the British Council, and GIZ projects have expressed their commitment to further supporting the establishment of the Council with funds, contingent on the results of the consultancy assignment.

Results & Impact

In Jordan, the empowerment of IDare as an advocacy group for the CCI sector marked the first instance of successfully bringing together cultural and creative practitioners, professionals and businesses from various domains, giving the sector a unified voice. Simultaneously, leveraging the mandate outlined in the EMV, the Ministry of Culture actively participated in the process, providing essential support and laying the groundwork for establishing the Design Council, as stipulated by the EMV. Consequently, GIZ facilitated the initial steps in setting up the council. Moreover, the initiative fostered a broader awareness of the CCI sector in Jordan, notably as the profession of design lacked official recognition and was only classified as a consultant or architect.

In Lebanon, the PPDs not only sparked a dialogue on the CCI sector but also contributed to a South-North and intra-religious discourse. Additionally, heightened awareness of the sector's needs emerged, prompting other international DC organisations such as UNESCO or the British Council to engage as partners committed to continuing their support for the Council's formal development in the future.

Critical Reflection

The original plan, mirroring Jordan's example to collaborate with an NGO or a similar organisation for establishing a Lebanese CCI Council, faced obstacles due to divergent interests. Nevertheless, a pragmatic project approach was adopted; GIZ oversaw the implementation of PPDs, cultivating awareness among stakeholders about the necessity for a formalised CCI Council.

In addition, development sector organisations and professionals aiming to replicate this approach, it is recommended to address internal organisational matters for expedited contracting and sustained momentum. Establishing a stringent timeline is essential to ensure alignment among all stakeholders.

Unlike Jordan, there is almost no public administration in Lebanon, yet it was crucial for the approach to involve political decision-makers; if not at the central level, then at the municipal

level, as they were willing to provide support despite the lack of funds. In Jordan, GIZ benefitted from the backing of individuals at the political level. However, broadening support at a higher political echelon would enhance the approach's resilience by reducing dependence on individual support.

5.4.6 BUILDING SAFE COMMUNITY SPACES FOR CCI PROFESSIONALS, PRACTITIONERS AND BUSINESSES

Approach in Brief

In Kenya, women and members of the LGBTQI+ community encounter persistent challenges in finding readily accessible venues to unleash their creativity, refine their skills, and express their ideas. The limited opportunities hinder the development of artistic talent and the exchange of knowledge and inspiration among individuals identified as creatives and visionaries. To address this gap, an initiative was devised to establish a dedicated physical safe space known as FemLab, catering to women and the LGBTQI+ community. Launched and run by the Goethe-Institut in 2023, FemLab serves as a secure environment for women and non-binary creatives to convene, network, collaborate, and engage in creative endeavours. The space hosts workshops, discussions, and lectures on pertinent topics within the CCI, accessible to all interested individuals. The space is open to professionals across the entire spectrum of the CCI. Additionally, the perFORM Music Incubator operates in the same premises as the FemLab (see chapter [5.4.4. Building Multidisciplinary Incubators for CCI Professionals, Practitioners and Businesses](#)).

Objective of the Approach

The approach is designed to establish a dedicated physical space for vulnerable groups within the CCI, by:

Identifying a space that is accessible to all target groups, fostering collaboration and exchange;

Outfitting the space and selecting appropriate organisations to be accommodated within it;

Organising events and programmes to raise awareness about the presence and purpose of the space.

Target Group & Partner Set-up

The identified target group for this approach encompasses:

- a. Organisations actively involved in the CCI seeking a shared workspace alongside the FemLab;
- b. Beneficiaries of the FemLab, particularly vulnerable groups in the CCI.

Detailed Description of the Approach

Vulnerable groups within the CCI, including women and members of the LGBTQI+ community, often encounter challenges in finding accessible venues to unleash their creativity, refine their skills, and express their ideas. Moreover, the significant cost of hiring venues for events and exhibitions places a financial burden on creatives, hindering their ability to realise such initiatives. This limitation in accessing affordable spaces not only affects the financial viability of creative endeavours, but also results in diverse voices going unheard and art unseen.

To address these challenges and provide a space for cultural and creative professionals, practitioners and businesses to collaborate and exchange ideas, a physical co-working and community space named FemLab was inaugurated in June 2023. Situated centrally in Westlands, within the basement of a shopping mall, FemLab offers a versatile environment equipped with basic infrastructure such as tables, chairs, water, projectors, and speakers. The space can be easily transformed to accommodate various activities, including trainings, workshops, co-working projects, art exhibitions, and events. Identifying a centrally located space took around three to four months. Artists planning film screenings, exhibitions, small concerts or other events are all eligible to use the underground stage free of charge.

With immediate neighbours including five entities from the music and virtual reality scenes, such as the perFORM Music Incubator and Santuri East Africa, the basement became a hub for cultivating a vibrant creative ecosystem. The entities leverage each other's presence, with initiatives like Santuri offering the perFORM Music Incubator's participants access to its studio.

While FemLab is inclusive to all genders, it specifically focuses on providing a welcoming space for women and non-binary individuals. Gender-neutral fashion shows have already been hosted to appeal to diverse groups. FemLab has an active and diverse programme, including masterclasses in '3D rendering' for women and diversity training sessions to promote inclusive practices among creative businesses. In addition to its physical space, the FemLab is in the process of developing FemBase, a database that currently houses over 100 women working in creative sectors. This database holds the potential to function as an agency in the future, facilitating connections that can lead to job opportunities. Registered members of FemBase are eligible to participate in mixer events and can also avail themselves of one-on-one business consultations.

Results & Impact

The establishment of the FemLab as a community and co-working space provided a platform for collaboration and exchange for vulnerable groups within the CCI. In the initial six months of its operation, the FemLab successfully reached over 1500 individuals through its events, workshops and programmes. Although it is too early to determine the full extent of FemLab's success, the creatives are making a meaningful contribution to social change by addressing important social issues in their art, such as LGBTQI+ acceptance in Kenya. Additionally, the FemLab has contributed to an upsurge in foot traffic within the shopping mall, prompting the mall management to investigate funding opportunities for the space during the drafting of this guide.

Critical Reflection

A comprehensive evaluation of the approach highlights certain areas that could have been more effectively managed to improve overall efficacy. For international DC organisations looking to replicate this approach, it is recommended to allocate additional funding for a dedicated management position, specifically focusing on organisational matters and event coordination. Moreover, establishing an operational model that ensures the sustainability of the space beyond the project duration is crucial and should be incorporated at the project's inception. While the limited funding for furnishing restricted the purchase of elaborate systems, it was noted that a complete PA system would have been beneficial, alleviating creatives from incurring additional expenses on technology and enhancing the overall utility of the space. Despite the significant potential of the FemBase concept, it is notable that the database was not digitised. To address this, international DC organisations looking to replicate the approach are advised to design a digital platform. This strategic move would not only enhance user accessibility but also contribute to a more efficient networking system.



5.4.7 STRENGTHENING CAPACITIES OF ASSOCIATIONS AND BUILDING UMBRELLA ORGANISATIONS

Approach in Brief

In the landscape of creative sector associations, there is a pervasive desire to come together and advocate for shared goals and aspirations. However, a recurring challenge emerges as these associations often grapple with a shortage of knowledge, skills, and capabilities necessary to effectively unite and address common concerns. Additionally, fragmentation and disorganisation within these associations contributes to rivalry and redundant roles among different entities, primarily fuelled by inadequate leadership and management skills within these nascent organisations. Coupled with a perceived absence of valuable services for members, these challenges collectively impede the cohesive and impactful functioning of creative sector associations.

To address this gap, an approach, branded as ‘Panga Sanaa,’ was devised in collaboration with Masson Associates and hosted at the Sarakasi Trust, a performing arts development organisation working to build capacity in the arts sector in Kenya. The approach aims to develop skills, knowledge and experience among young leaders from associations, empowering them to shape their organisations and collectively enhance the sector’s visibility. This, in turn, facilitates policy research and dialogue.

Objective of the Approach

The approach is structured to enhance the strength of associations within the CCI, by:

Incubating action-oriented leaders from both emerging and established associations;

Providing essential infrastructure for leaders to collaborate, exchange ideas and expand networks;

Enabling leaders to formulate joint strategies to present a unified voice for the CCI;

Empowering leaders to facilitate policy research and engage in meaningful dialogue.

Target Group & Partner Set-up

The identified target group for this approach encompasses:

- a. Leaders from both emerging and established associations actively involved in the CCI aiming to enhance their leadership skills and overall capacities to collectively represent the sector;**
- b. Beneficiaries of heightened sector visibility; specifically cultural and creative practitioners, professionals, and businesses.**

Detailed Description of the Approach

Associations within the CCI play a vital role in supporting their members and advocating for the sector. Unfortunately, the presence of inadequate leadership and management skills often results in disorganisation, leading to fragmentation, rivalry, and a collective inability to advocate effectively for the sector. To tackle this challenge, an approach known as ‘Panga Sanaa’ was developed with the goal of empowering leaders from these associations, enabling them to shape their organisations and collectively enhance the sector’s visibility.

To identify the most persistent capacity gaps, a comprehensive needs analysis was conducted before designing the programme. It revealed a dual need: associations lacked both organisational structure and leadership skills on one hand, and joint lobbying and advocacy skills on the other. In collaboration with the partners, Masson Associates, a fellowship programme was crafted, to be hosted at the Sarakasi Trust. A public call was issued for leaders within CCI associations to apply, with associations nominating three leaders each for the programme. Out of 40-50 applications, 10 associations were selected based on a vetting process that included criteria such as registration, existing activities, elected officials, and a basic constitution. Each organisation underwent an interview process to finalise the selection.

The nine-month fellowship programme was structured into two phases. The first phase comprised an intensive three-month programme with weekly in-person classes at the Sarakasi Trust. These sessions were complemented by industry expert sessions and labs, providing participants with opportunities to apply learned skills in different environments. The second phase involved a six-month mentorship programme aimed at integrating the acquired knowledge into the participating organisations.

The comprehensive curriculum devised for the programme covered modules on operational policies and standard operating procedures, leadership and governance, membership models and services, strategic planning, lobbying, advocacy, policy and campaign development, fundraising and proposal writing, business modelling for sustainability, and monitoring evaluation. Special emphasis was given to networking and coalition building to encourage collaboration among

participating associations, addressing fragmentation within the ecosystem. This collaborative effort included joint policy paper writing and the development of common positions on issues relevant to the CCI. Notably, the intensive collaboration resulted in the voluntary formation of an umbrella organisation during the fellowship's implementation.

Results & Impact

The impact of the programme has been significant and multi-faceted. Notably, the collaborative efforts within the programme have catalysed the establishment of an umbrella organisation representing the CCI. Moreover, it has instigated a broader shift in mindset within the participating organisations, fostering an awareness of their collective influence. Illustrating this shift, a critical juncture arose midway through the programme when the Kenyan government proposed changes to the IP law, posing potential adverse effects on the CCI. In response, the programme participants united to formulate a shared position and successfully advocated for the retention of the existing law. This collaborative advocacy effort also triggered internal changes within the associations. Three organisations reviewed their constitutions to align more effectively with their objectives. Additionally, sub-alliances were formed among associations with similar target groups. The capacity-building initiatives further facilitated an overall improvement in the organisational structures of the associations, resulting in a notable increase in membership numbers.

Critical Reflection

The programme was structured to involve three members from each association, specifically at the board or management level. However, challenges arose due to internal resistance, particularly within associations with a substantial number of board or management staff who were not exposed to the training sessions. For international DC organisations seeking to replicate this approach, a strategy to address this challenge would involve conducting on-site training at the associations, incorporating a broader range of members to enhance ownership. Additionally, occasional issues of inconsistent participation were noted during the intensive weekly sessions. To address this, an alternative solution could be organising off-site intensive training sessions structured into blocks of modules.

5.5 APPROACHES ON THE MICRO-LEVEL

5.5.1 INTEGRATING SOFT SKILLS IN CCI TECHNICAL PROFESSIONS

Approach in Brief

The global graphic design market is valued at \$45 billion USD, and Lebanon stands as a prominent hub in the MENA region for numerous global graphic design companies, marketing and advertising agencies. Despite the availability of excellent graphic design education at various private and public universities in Lebanon, young graphic designers often encounter challenges in securing suitable employment. According to insights from agencies, the primary hurdle in hiring local staff lies not in their technical skills, but in soft skills such as presentation abilities, time management, and creative thinking. To address this gap, a 10-day Career Blueprint short course named Bridge-the-Gap for graphic designers was developed and anchored with a group of culturally enthusiastic individuals known in the CCI in Lebanon who, after a pilot phase, integrated the course into an NGO (Musharek) that was not operational at the time of the pilot phase. This integration allowed for the continuation of the courses under a self-sustaining business model. Therefore, while the primary objective of the approach is to enhance the soft skills of graphic designers at the micro level, the strategic anchoring of the course among successful and well-known cultural and creative practitioners—who reactivated an NGO to sustain the initiative at the meso level—proved instrumental in the approach’s success.

Objective of the Approach

The approach is designed to enhance soft skills in technical professions within the CCI, specifically targeting graphic designers, by:

Creating specialised curricula for graphic designers, with a particular focus on developing soft skills;

Establishing a partnership with an NGO to secure the long-term sustainability of the course.



Target Group & Partner Set-up

The identified target group for this approach encompasses:

- a. **Graphic designers lacking essential soft skills and seeking employment;**
- b. **A group of like-minded enthusiasts from the CCI who developed the course (Bridge-the-gap) and later transitioned the course to an NGO (Musharek) to continue it through a self-sustaining business model.**

As the initial search to find a suitable NGO to develop the courses failed, the collaborative effort with a group of cultural enthusiasts, well-versed in the graphic design scene and without conflicting interests, proved instrumental in the success of the initiative. This group chose to sustain and institutionalise the course by integrating it into the framework of an NGO, which was inactive during the initial conceptualisation phase.

Detailed Description of the Approach

Lebanon has historically served as a prominent media hub in the MENA region, attracting numerous global marketing, media, and web agencies. The country's predominantly privately-run higher education institutions have consistently produced technically proficient professionals in the digital arts and graphic design sectors. Despite this, many individuals with technical expertise face challenges in securing suitable employment. Conversations with media companies highlighted a significant deficiency in the soft skills of these professionals.

To address this issue, an initial concept for a short-term course was devised to bridge the skills gap. GIZ initially sought an NGO or another suitable organisation to develop and anchor the short-term course. However, the search for an appropriate partner organisation without conflicts of interest during the initial phase did not yield results. Leveraging the extensive network of local GIZ staff, a group of culturally enthusiastic and successful practitioners was identified. This group expressed interest in piloting the course as part of a consulting assignment. Collaborating with an academician who serves as a professor at the American University of Beirut, curricula for a 10-day course were developed.

The short course, which takes place in the evenings, comprises eight modules:

- a. **Creative Thinking**
- b. **The Power of Storytelling: How to Tell Your Story**
- c. **Marketing: How to Market Your Personal Brand**
- d. **Branding: How to Bring Your Personal Brand to Life**
- e. **Presentation: How to Present Yourself to Your Client or at a Job Interview**

- f. **Propose & Pitch: Pitching Like a Pro**
- g. **Negotiating and Persuading**
- h. **Masterclass with Guest Speakers**
- i. **Business Basics: Time and Crisis Management.**

The modules incorporate homework assignments and conclude with a pitch to media companies for internships. After three cohorts of 25 students each, the group recognised the potential of the course and reactivated an NGO (Musharek) to integrate the course into its activities. To enhance the NGO's capacity to offer the course under a sustainable business model, improve the course content, and expand its reach to professionals in other media and digital arts sub-sectors, GIZ provided a grant to the NGO in the form of a local subsidy.

Results & Impact

The course successfully trained 72 graphic designers, with 32 of them securing internships at media agencies, thereby positively influencing the income and employment prospects for graphic designers in Lebanon. Another significant achievement was the transition of the programme to an NGO supported by enthusiasts, ensuring its continued long-term offering. This addresses a crucial gap in teaching soft skills that many universities have struggled to address. The streamlined design of the curricula presents the potential for transfer to other countries and sale to media companies by the organisations implementing the curricula. The compact design of the curricula offers the potential to be transferred to other countries and sold to media companies by the organisations implementing the curricula.

Critical Reflection

The initial strategy involved collaborating with an NGO or a similar organisation for the development and delivery of the courses. However, adopting a pragmatic project implementation approach and partnering with individuals passionate about the topic and without conflicting interests yielded success, particularly in countries with intricate religious and political structures like Lebanon.



5.5.2 INTEGRATING JOB PLACEMENT OPPORTUNITIES IN TRAINING INTERVENTIONS

Approach in Brief

The global market for commercial drones was estimated at \$8.77 billion USD in 2022; it is projected to grow from \$10.98 billion USD in 2023 to \$54.81 billion USD in 2030.^[71] This growth has led to the emergence of numerous training courses and study programmes focusing on drone technology. Despite the increasing availability of training opportunities in this field, women — particularly those from disadvantaged backgrounds — remain under-represented and face challenges in securing employment in the drone industry. In response to this gender gap, the ‘Drone Divas’ programme was established in South Africa through a collaboration between the Goethe-Institut and Africa Beyond 4IR (AB4IR). This initiative aims to provide young, disadvantaged women from townships with the opportunity to succeed in the male-dominated South African drone industry. The programme not only emphasises the enhancement of women’s technical and digital skills but also places a significant focus on developing their entrepreneurial abilities, with contributions from AB4IR. Additionally, the programme was designed to align closely with the needs of the private sector by actively involving drone companies in project activities and facilitating internships for women within these companies, thereby bridging the gap between training and job placement.

Objective of the Approach

The primary aims of the approach are to strengthen the technical and entrepreneurial skills of disadvantaged women in the drone industry, and to open up better income and employment prospects for them, by:

Developing specialised curricula that focus on both technical as well as entrepreneurial skills;

Collaborating with private sector companies to secure internship placements for trainees;

Facilitating cooperation among relevant stakeholders to consolidate expertise and maximise impact.

Target Group & Partner Set-up

The identified target group for this approach encompasses:

- a. Young disadvantaged women of colour
- b. Different service providers, training organisations, and private sector entities contributing expertise and knowledge.

The primary in-country collaborator is Africa Beyond 4IR (AB4IR), in partnership with the Goethe-Institut. AB4IR, a digital innovation hub, emerged from the necessity to address the digital gap in historically disadvantaged communities in South Africa. It offers support for entrepreneurship and incubation. AB4IR has engaged additional technical service providers with proficiency in drone technology to this particular programme.

Detailed Description of the Approach

Women of colour from disadvantaged backgrounds remain underrepresented in the South African drone sector, facing challenges in connecting with the labour market. Recognising this, the Goethe-Institut, in collaboration with the CEO of AB4IR (Africa Beyond 4IR), who also served as a founding director of the Drone Council of South Africa at that time, deliberated on a comprehensive response. The objective was to provide women of colour from disadvantaged backgrounds with avenues to enter the drone sector. The conclusion emphasised the necessity for a programme encompassing not only technical and entrepreneurial training, but also close alignment and collaboration with the private sector. It was decided to focus the programme on women in the vicinity of AB4IR, facilitating their physical attendance at training sessions, which was seen to be especially important given the initiation of the programme during the COVID-19 pandemic.

Subsequently, a four to six-week programme was developed, featuring a curriculum encompassing learning modules for drone applications in various creative fields such as photography, film, architecture, agriculture, tourism, research, and science. The practical training covered drone operation, programming, filming, 3D modelling, and an introduction to entrepreneurship; modules on Design Thinking and Business Model Canvas were also incorporated. The technical implementation involved engaging service providers with experience in the drone sector. For the last two cohorts, a technical service provider, led by a woman of colour with a technical background and a commercial pilot's license, was selected to inspire and connect with the target group.

To ensure successful participation, specific selection criteria were established. Prospective participants had to be between 18 and 35 years old, reside in the townships around AB4IR, possess an educational level similar to that of a high school graduate, and have proficiency in English, the language of instruction. An aptitude test was introduced to evaluate language comprehension.

With the support of AB4IR and the Drone Council of Africa, outreach was conducted to companies specialising in the operation of drones to provide internships of up to three months to the top 10 graduates of the programme. Recognising that smaller companies might face constraints in paying interns, a stipend programme was introduced to cover logistical costs for the trained women. While the initial cohorts took place near AB4IR, the programme was expanded to other underserved regions of South Africa for subsequent cohorts, with identified venues ensuring local participation. This scaling approach firmly rooted the programme in the South African context and was replicated with institutions such as the University of South Africa.

Results & Impact

The programme's engagement with the private sector, facilitating internships at their companies, has resulted in several participating firms hiring interns. Five women from the inaugural cohort secured permanent positions following the completion of their internships. Furthermore, certain private sector entities have recognised the programme's value and actively participated in the scholarship initiative for women. Each cohort received a substantial number of applications, underscoring the demand for specialised technical training for disadvantaged women. The integration of entrepreneurship modules, coupled with technical expertise, has empowered some women to initiate their ventures. For instance, one participant obtained a license from the Sector Education and Training Authority (SETA), underwent additional technical training in drone maintenance, and is currently training other women in drone operation and maintenance. In summary, the programme's multidisciplinary and collaborative approach has equipped disadvantaged women with comprehensive theoretical and practical training across various domains, enabling them to pursue careers in the drone industry.



Critical Reflection

The drone sector is highly regulated and controlled due to various security risks. Licenses can be prohibitively expensive, posing a significant challenge for disadvantaged women seeking to pursue opportunities in this field. Therefore, international DC organisations aiming to replicate this approach should allocate a higher budget to enable women to obtain the necessary certifications and licenses. Additionally, incorporating a module that connects women with entrepreneurial ideas to potential investors could help address some of the funding gaps, particularly faced by women. Moreover, a sustainability concept for the programme should be developed during the design phase and through discussions with partners to ensure the continuation of such initiatives beyond the limited project framework of international DC organisations.

5.5.3 DEVELOPING AWARENESS CAMPAIGNS ON ISSUES RELEVANT TO THE CCI



Approach in Brief

The CCI faces various knowledge gaps, with one significant concern revolving around copyright and intellectual property issues. Many professionals, practitioners, and businesses in the cultural and creative fields lack awareness regarding the options available for protecting their products. To address this knowledge gap, an awareness campaign focusing on copyright and intellectual property issues was devised in partnership with the Kenya Copyright Board. The chosen approach for raising awareness involved a video campaign, dialogue formats, informational events, and individual consultations. The latter two were held at the newly established FemLab (see chapter [5.4.6. Building Safe Community Spaces for CCI Professionals](#)).

Practitioners and Businesses). The collaboration with the Kenya Copyright Board not only contributed to bridging the knowledge gap, but also reinforced the organisation's mandate: enhancing awareness among cultural and creative professionals, practitioners, and entrepreneurs regarding their services, such as an intellectual property registry.

Objective of the Approach

The approach aimed at increasing awareness about copyright and IP issues among cultural and creative professionals, practitioners and businesses, concurrently reinforcing the mandate of the Kenya Copyright Board, by:

- Creating an awareness campaign** that encompassed a video campaign, dialogue formats, informational events, and individual consultations tailored for cultural and creative professionals, practitioners, and businesses;
- Elevating awareness** among cultural and creative professionals, practitioners, and businesses regarding the organisation's services through targeted matchmaking efforts.

Target Group & Partner Set-up

The identified target groups for this approach encompasses:

- a. Cultural and creative professionals, practitioners and businesses with limited knowledge about copyright and IP issues;**
- b. Policy-makers who usually do not leverage the opportunity to network and exchange on copyright and IP issues.**

The primary collaborator in implementing the approach was the Kenya Copyright Board. The organisation is mandated with overseeing the comprehensive administration and enforcement of copyright and related rights. The Board engages in various activities, including public awareness initiatives, enforcement efforts, copyright registration, licensing of collective management organisations, and educational programmes on matters related to copyright and related rights. Additionally, it plays a coordinating role in the activities of the copyright industries.

Detailed Description of the Approach

In Kenya's vibrant creative industries, the effective safeguarding of rights and income hinges on a comprehensive understanding of IP and copyright laws. However, many cultural and creative professionals, practitioners and businesses encounter challenges in navigating these protections, facing barriers to fully realise the benefits of their work due to a lack of sector-specific legal information. In response, GIZ, in collaboration with the Kenya Copyright

Board, devised an approach to raise awareness about copyright and intellectual property. The approach comprised four main elements:

- a. **A video campaign**
- b. **Dialogue formats**
- c. **Information sessions**
- d. **Individual consultations for creatives.**

Three experts specialising in copyright, entertainment, and IP law were commissioned to develop content for the video campaign. Based on the information gathered by the lawyers, multi-stakeholder workshops were held to identify the key content elements, determine the style of the videos and structure them accordingly. It was decided that animated cartoon-style videos would be most effective in reaching the target audience. A scriptwriter was engaged to transform the legal information into engaging scripts. A one-day workshop was held with the Kenya Copyright Board, the scriptwriter, the video production team and GIZ to brainstorm ideas for each video. The scriptwriter then finalised the video scripts. The videos were produced in Swahili, English, and Sheng (a Swahili-based slang widely spoken in Nairobi mixed with English), and published on the Kenya Copyright Board website and YouTube channel.

To raise general awareness and facilitate discussions on copyright and intellectual property, a series of dialogues were conducted, bringing together policy-makers, cultural and creative professionals, practitioners, and businesses. Additionally, representatives from the Kenya Copyright Board and prominent entertainment lawyers collaborated with Nairobi's FemLab to provide tailored support for women in the creative sector. Open dialogue sessions covered various topics, including the benefits of copyright registration and collective management of copyright. These sessions equipped creatives with essential knowledge on how to protect their intellectual property. To ensure immediate action, the Kenya Copyright Board offered free on-the-spot copyright registration and re-registration services. Entertainment lawyers also provided one-on-one consultations to address individual legal issues faced by creatives.

Results & Impact

Through this comprehensive and collaborative approach, the initiative successfully addressed significant knowledge gaps. The awareness-raising campaign on copyright and intellectual property was extensive, contributing to an enhanced understanding among the target group regarding the potential for safeguarding their products. Consequently, the Kenya Copyright Board observed a rise in copyright and intellectual property registrations, resulting in 1,263 new registrations. The dialogue formats were pioneering in bringing together cultural and creative professionals, practitioners, and businesses with policy-makers to deliberate on copyright and IP matters, thereby increasing awareness of challenges faced by the CCI.

Critical Reflection

In this partnership, one-on-one consultations have proven to be particularly successful. To broaden the impact of these consultations, it is recommended to collaborate with additional hubs, particularly those situated outside urban centres. Therefore, international DC organisations seeking to replicate this approach should engage multiple outreach partners in the design of the initiative. Additionally, the video production process was intensively resourced but lacked a subsequent outreach and marketing strategy. To maximise reach and impact, it is advisable to formulate a comprehensive marketing strategy to ensure that the videos reach a wide-ranging target audience.



Photo: GIZ/Media Force

5.5.4 STRENGTHENING DIGITAL SKILLS FOR THE DESIGN SECTOR

Approach in Brief

The design sector has witnessed a significant transformation with the emergence of digital design tools and services for the digital space, e.g., websites, apps, metaverse design or the Internet of Things. Proficiency in tools like Adobe Creative Cloud, Sketch, Figma, Affinity Designer, Overflow, Whimsical, Marvel, and other digital platforms is crucial for creating high-quality, precise, and visually appealing designs. As a result, there is a noticeable increase in demand for qualified professionals equipped with up-to-date digital design skills. Specifically, individuals with expertise in User Experience (UX) design and User Interface (UI) design, both of which are integral to creating effective and engaging digital products, are in high demand worldwide, even more so in the Arab-speaking world, offering promising job opportunities for digital design professionals. However, a supply gap exists that requires atten-

tion. To address this gap, a UX/UI course was developed and implemented in collaboration with Re:Coded in Iraq. Moreover, recognising that professions in the CCI are often perceived as less serious by society, government authorities, and economic stakeholders, a two-phased advocacy campaign was designed to raise awareness about the significance of UX/UI as a profession with growth potential. Therefore, the approach aimed to enhance digital skills, particularly for women, while concurrently increasing awareness of the potentials associated with the digital transformation.

Objective of the Approach

The approach sought to enhance digital skills in the realm of UX/UI, thereby expanding job opportunities for digital design professionals, and fostering awareness among societal stakeholders regarding the importance of UX/UI as a profession in the digital economy, by:

Collaborating with a reputable organisation to create and implement a UX/UI course;

Devising a two-phased advocacy campaign to promote awareness and understanding.

Target Group & Partner Set-up

The identified target group for this approach encompasses:

- a. Young professionals, particularly women, with an affinity for the digital design sector;**
- b. Society stakeholders with limited knowledge about the economic potential of the UX/UI sector.**

The principal collaborator in implementing the approach was Re:Coded, a training organisation specialising in initiating new careers or cultivating skills and competencies for the digital economy. Their focus spans various domains, including HTML, CSS, JavaScript, React, UX/UI, data science, and more.

Detailed Description of the Approach

The CCI in the MENA regions is increasingly in need of professionals with digital design skills. However, limited awareness among society and the absence of skills programmes for aspiring professionals create a significant gap. To address this, an approach was developed in collaboration with Re:Coded Iraq, incorporating two key elements. Firstly, a two-phased advocacy and awareness campaign was implemented in Iraq but at the same time in Lebanon and Jordan, to present UX/UI as a viable, income-generating, and sustainable career option,

fostering acceptance among family members and society. Secondly, UX/UI design bootcamps were established in Iraq and Lebanon, with a focus on intensively teaching digital design skills, especially among women.

Once the target group of the campaign was identified, an open discussion was held with the target group to uncover possible enabling or discouraging factors. The campaign content, including a landing page, blog articles, and social media content, was developed based on these insights. Following this, the social media outreach was planned, and keywords were defined for search engine optimisation (SEO). The campaign content was then disseminated with the support of key partners.

In the first phase, the campaign aimed to introduce UX/UI as a viable, income-generating career option and spark curiosity. The campaign sought to reach as many creative professionals in the design sector as possible. For this purpose, a landing page was designed that included nine blog articles exploring the world of UX/UI design. To engage the potential target group, a quiz was designed to explore if ‘there is a UX/UI designer in you’. Additionally, a download link with free UX/UI resources was provided.

Moving to the second phase, the primary goal was to guide digital designers early in their careers to find work by understanding employer needs. Video content continued to be a key element, with a video series created on topics such as ‘How can I stand out as a UX/UI designer?’. Four blog articles, featuring content such as ‘Create a stellar UX/UI design portfolio in 5 steps’, were added to the landing page. An exclusive feedback event for upcoming UX/UI designers and their portfolios was also conducted.

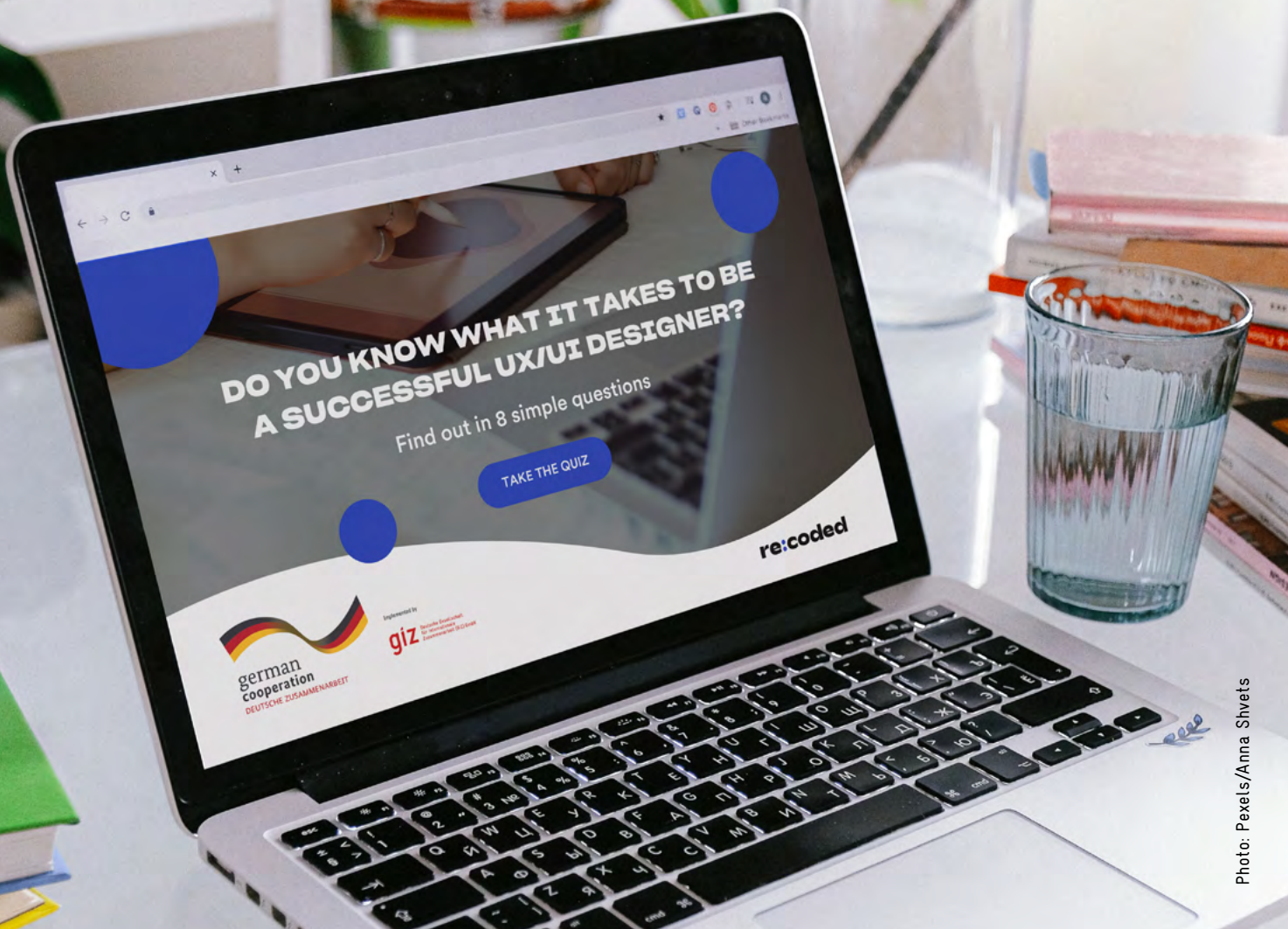
Alongside the advocacy campaign, Re:Coded established UX/UI design bootcamps. The Flatiron School UX/UI product design curriculum was purchased and adapted to the local context. Entrepreneurship was integrated into the curricula to encourage participants to start their own businesses. The 16-week programme included modules on UX and UI design, culminating in a final capstone project with the goal of each participant completing the bootcamp with a fully defined UX/UI project to present in their portfolio. Participants also received one-to-one career coaching sessions, profile reviews, completed mock interviews, and were connected with potential employers. The application for the bootcamp consisted of a three-stage selection process with an application form, a design challenge and a final interview. Two bootcamps were organised with the support of GIZ. The bootcamps were mainly conducted online, making them accessible, especially for women. In total, the two cohorts consisted of 53 participants, and the bootcamps have been integrated into Re:Coded’s regular programmes to continue teaching young designers UX/UI design skills.

Results & Impact

This meticulously executed advocacy campaign successfully addressed notable knowledge gaps regarding the advantages of a career as a UX/UI designer. The campaign's YouTube videos garnered over 1.5 million hits, reflecting substantial outreach and engagement. Consequently, the awareness-raising initiatives played a pivotal role in enhancing societal perceptions of the profession. Two cohorts, totalling 53 participants, engaged in intensive bootcamps, resulting in a 92% employment rate within the sector following the courses. The success of these efforts prompted Re:Coded to incorporate the course into their standard service offerings.

Critical Reflection

The awareness campaigns aimed to shift societal perceptions of UX/UI design professions. However, international DC organisations could broaden their scope to include policy-makers, if feasible in the national context. This expansion aims to enhance advocacy efforts and elevate visibility for the sector. While the cost-participant ratio of the bootcamps is relatively high, M&E indicates that comprehensive training programmes offer greater potential and better results to be employed compared to one-time sessions. In pursuing an improved cost-participant ratio and at the same time ensuring high employment rates, international DC organisations may also explore the implementation of shorter-term training programmes. More concise sessions, however, need to ensure that aspiring designers are being equipped with the necessary skills for UX/UI work.





6. MONITORING & EVALUATION

6.1 MONITORING SYSTEM

As previously underscored, the CCI not only serves as a source of employment for young individuals and women but also contributes significantly to social and environmental transformations. The CCI plays a vital role in advancing various Sustainable Development Goals (SDGs), including: education (SDG-4), gender equality (SDG-5), decent work and economic growth (SDG-8), industry, innovation and infrastructure (SDG-9), reducing inequalities (SDG-10), sustainable cities and communities (SDG-11), responsible consumption and production (SDG-12), climate action (SDG-15) and partnerships to achieve the goals (SDG-17).

Nevertheless, assessing the economic, socio-cultural, and environmental impact of the CCI remains a substantial challenge for evaluating existing initiatives, developing new projects, and informing policy-making. Particularly for international DC organisations implementing regional or global projects with a focus on job creation, monitoring data becomes intricate due to inconsistent and varying definitions and classifications of the CCI, as well as the diverse job profiles falling under its umbrella. While projects can establish monitoring and evaluation (M&E) systems to gauge the impact of their activities, comparing these outcomes with official statistical figures in the respective countries proves challenging.

Process of developing the M&E system

In light of these considerations, the Global Project CCI established the project's key performance indicators and formulated a theory of change. This process was conducted in collaboration with

an international consulting firm, specialising in M&E and web application development, that retained for the project's entire duration. The consultancy organised introductory workshops in each partner country to further refine the result hypothesis and develop impact measurement methods specific to each country. The project's focus laid on evaluating income and employment effects in the CCI. Throughout these workshops, discussions were held to assess the validity of the impact theory. Following these deliberations, several impact models were devised to capture the interventions within the partner countries, on a transnational scale, and across respective sectors. Additionally, a condensed impact model for the overall project was formulated. Periodic updates to the result models were incorporated during annual review workshops to account for various changes and adjustments experienced by the project. In the initial kick-off workshops, the existing indicators were defined, and supplementary ones were developed to align with the theory of change articulated in the impact models.

Sample definition of module objective indicator 1:

Indicator: In the selected partner countries, 70 % of 3,000 cultural and creative professionals (of whom 1265 are women) who have benefited from the support measures demonstrate, by means of a specific example, that their **employment and income situation and prospects have improved**.

Definition by the project: The indicator measures the number of cultural and creative professionals whose employment and income prospects have improved supported by the global project cultural and creative industries.

An 'improvement in employment and income prospects' includes **at least two of the following aspects:**

- **New employment as an employee or sole proprietor (self-employed):** Taking up a new job in the same role (verifiable advancement), at another company (as employee), or as a sole proprietor / self-employed (start-up) after the start of the measure.
- **Improving income:** Demonstrable and demonstrably attributable to an activity if the project, increase in: Income (from contract work, as sole proprietor or managing director), Turnover (of the enterprise) or Orders (of the enterprise) over a defined period of time (e. g. 6 months).

- **Increased employability through qualification measures:**
 - Better chances of future employment on the labour market due to clearly defined skills that are needed on the market, which were taught through vocational qualification measures of the project.
 - Increase employability must be proven by concrete example.
- **Expansion of market access through the development of new customer segments in the country or through new markets abroad.**
 - Structural new development of new markets and market segments e. g., through networking/new contacts, market research, newly defined positioning strategy, participation in trade fairs, study trips or B2B missions.

Subsequently, a monitoring plan was devised for each indicator: outlining the data collection method, applied methodology, questionnaire specifics, measurement frequency, designated data collector, required resources, information utilisation, reporting recipients, and the underlying calculation of the indicators. It was determined that outcome indicators, primarily focusing on employment and income generation, would be assessed through an annual tracer study using questionnaires. Concurrently, output indicators, encompassing data related to training, participants, events, or innovative approaches, would be continuously measured. Data collection for output indicators was to be facilitated through questionnaires and a web-application (see the following paragraphs). The tracer study questionnaire was meticulously developed and validated through two focus group discussions with the target group. All insights gathered from workshops, focus group discussions, and internal validations conducted by the M&E consultancy were consolidated into an M&E manual. This manual served as a comprehensive guide for monitoring and reporting on the indicators for the Global Project CCI.

The manual helped to answer the following questions:

1. What are the reporting requirements?
2. How are the indicators defined that apply to the project?
3. How can data on the relevant indicators be collected?
4. Which data should be collected and when and how?
5. How to use the digital M&E tool?

The digital M&E tool

The project initiated the development of an easy-to-use and participatory web application to monitor the project. The objective was to seamlessly integrate project partners into GIZ's M&E framework, fostering a shared understanding of the M&E process. The tool was designed to offer a systematic and real-time overview of project progress. It enables partners to update data, track progress on indicators, and disseminate the project's results and achievements. The web browser-based tool assigns varying access rights to users based on their roles. Its structure aligns with the impact model of the programme, making it adaptable to other project contexts. The tool's introductory section provides an overview of all indicators, their level of achievement, and the results models. Subsequent sections present operational data for the indicators, structural data by country in the data structure section, and data from the tracer studies in the final section of the tool.

Recommendations for an effective M&E

While the M&E system for the Global Project CCI was collaboratively developed with project partners, it is advisable to engage local and international stakeholders (such as statistical offices and policy-makers) in the M&E development process to ensure alignment and sustainability. A collaborative approach ensures the creation of a monitoring design aligned with local interests, increasing the likelihood of continuity beyond the project's duration. In this context, adhering to the 'leave-no-one-behind' principle, it is recommended to translate tools or monitoring data into the respective national languages.

Effective implementation of M&E is resource-intensive, especially for global projects spanning multiple countries as well as projects focusing on the CCI. Considering the lack of public data, it is crucial for projects in this emerging sector to establish thorough monitoring systems and provide baseline data essential for advocacy in international cooperation and beyond. Therefore, it is recommended that international DC organisations allocate sufficient resources for M&E during the project design stage. Regarding the tracer study, the project utilised an agreed questionnaire with a response rate of 5–10%. It is proposed to validate the results qualitatively through focus group discussions with beneficiaries.

6.2 MONITORING AND EVALUATION RESULTS OF THE GLOBAL PROJECT CCI



As previously emphasised, routine tracer studies serve as effective tools for assessing the success of interventions in international development cooperation projects, especially in gauging

the impact of CCI initiatives. Within the framework of the Global Project CCI, three tracer studies were undertaken in 2021, 2022, and 2023, aiming to comprehensively grasp not only the impact but also the evolving changes observed over the years.

Tracer study results and recommendations for the approaches

With a primary focus on the economic aspects of the CCI, such as employment and income generation, the tracer study conducted for the Global Project CCI did not encompass the measurement of environmental benefits, intangible cultural impacts, or innovation spill-overs. It only indirectly measured social benefits, through the partner organisations of the project. For international DC organisations aspiring to measure the direct impact on these multifaceted factors, it is imperative to formulate projects with corresponding indicators.

The response rate across all tracer studies averaged approximately 12%. Cumulatively, the findings indicate that 66% of the respondents experienced improved employment and income prospects (meaning, creatives confirmed having acquired employment-relevant skills or having gained market access AND having found new employment or higher income). Most creatives reported that they became self-employed rather than finding work as an employee. A notable gender gap is evident in the results, with only 58% of women reporting enhanced employment and income prospects. Whilst feedback from women on qualification measures are high, they seem less able to apply the learnings in their professional careers. Insights from the project's gender study propose that social barriers, including gender stereotypes, impede women and the LGBTQI-community from finding employment in non-traditional professions or leadership roles. Additionally, women rated their own employability lower than men, suggesting lower confidence when entering the job market. Compared to their male peers, women reported to feel significantly less confident and advanced in their leadership skills. Perceived competency differences between men and women included categories such as 'interacting and presenting' and 'adapting and coping', as identified by Bartram's (2005) Big Eight competencies model.

The findings suggest that cultural and creative professionals, practitioners and businesses have been able to enhance their entrepreneurship, digital, creative, and soft skills (in particular, confidence, presentation and pitching skills). Many also reported an expansion of their professional networks and the initiation of collaborations. However, while skill improvements were acknowledged, they did not necessarily translate into better employment or higher incomes without additional improvement at the business environment and policy levels.

The Global Project CCI also dedicated efforts to fortify the ecosystem for cultural and creative professionals, practitioners and businesses. Therefore, the study examined the extent to which CCI organisations and the ecosystem have evolved and provided adequate services. Beneficiaries expressed appreciation for the capacity-building activities developed by organ-

isations, and most creatives believe that ecosystem actors represent their interests. However, they also highlighted the need for more support in terms of market access, international networking, funding, and the availability of sector-specific information. The results provided a positive correlation with income and employment promotion when qualification measures and market access opportunities are combined. The initial tracer study identified that access to new markets and funding is strongly influenced by external factors (e. g., pandemics, travel restrictions, geopolitical events) that need to be mitigated to enable growth in the sector. In this context, the global project also aimed to enhance the resilience of cultural and creative professionals, especially considering the significant impact of the Covid-19 pandemic on the sector. The pandemic led to a substantial loss of income for creatives, with 78 % confirming such losses and 43 % reporting a loss exceeding 50 % of their annual income in 2019. Despite these challenges, the tracer studies revealed a largely positive impact of the project on creatives' resilience, with 85 % confirming an improvement in their resilience. CCI organisations also faced challenges during the pandemic but demonstrated resilience, with almost half of the supported organisations expanding or maintaining their range of services due to resilience support. The funding support provided by the programme was particularly valued by CCI organisations in navigating the challenges posed by the pandemic.

The tracer studies yield several recommendations that can influence the design of international development cooperation approaches:

1. Focus on women:

Due to the challenges faced by women in improving their employment and income prospects, international DC approaches should prioritise them as a target group. Investigating the barriers preventing women creative professionals from entering the labour market is crucial during the development of activities and approaches. Consideration should be given to enhancing the enabling environment, including sector advocacy, policy initiatives, and funding partnerships with ecosystem actors.

2. An enabling environment:

Approaches need to focus more on enabling environment factors (sector advocacy, policy, funding, market access) developed in partnership with ecosystem actors. The legal and environmental framework in many countries remains insufficient to holistically address the economic potential of the CCI.

3. Timeframe for impact:

The studies indicate that employment potential increases over time, with the greatest impact observed two to three years after completing project

activities such as training. Therefore, correlating activities with the employment and income situation of creatives may be challenging within a short timeframe. Recognising the informal and seasonal nature of work in the CCI, methods for measuring these employment effects need to be applied, and the duration of projects may not be sufficient to capture the full impact of interventions.

4. Aligning approaches to income generation:

International DC organisations can strengthen the link between their approaches and income generation or better employment prospects. This could be achieved through strategies with a strong job placement aspect (see chapter [5.5.2. Integrating Job Placement Opportunities in Training Interventions](#)). The most successful qualification measures were long-term (<40hrs) trainings combined with a stipend or mentorship programme and support in accessing international markets.

5. Mitigating external factors:

Efforts should be intensified to mitigate external factors such as the COVID-19 pandemic. Improving continuous access to markets and funding for cultural and creative professionals, practitioners and businesses, along with providing support to ecosystem actors, is crucial. The funding offered to CCI organisations during the pandemic was perceived as significant support. It has been established that access to markets correlates strongly with better employment and income effects. This entails concerted efforts to empower and support ecosystem actors in facilitating market access and financial opportunities for those in the cultural and creative sectors.

Between July 2023 and February 2024, the Global Project CCI underwent a comprehensive central project evaluation, commissioned by GIZ and conducted by an independent evaluation team. The primary objective of the evaluation was to assess the project's performance based on the OECD-DAC standards, including relevance, coherence, effectiveness, efficiency, impact, and sustainability. The evaluation team conducted interviews and focus group discussions on-site in the partner countries to collect, assess, and evaluate relevant data. As of the current writing, the final results of the evaluation are not available; however, they will be published on GIZ's website in spring 2024.





7. PROSPECTS

While the strategies outlined in Chapter 5 (see [5. Approaches to Strengthen the CCI](#)) serve as crucial interventions that can be tailored and duplicated by international development organisations to enhance the CCI in their partner countries, the in-depth analyses performed by the Global Project CCI have unearthed additional concepts for potential interventions within countries but also at the international level, that international DC organisations may consider validating and, if proven feasible, incorporating into their project designs.

International Level

Establishing a Women's Creative Network for the Cultural and Creative Industries

The CCI is one of the four sectors with the highest rates of women employment. However, achieving gender equality remains an ongoing challenge, marked by the underrepresentation of women in managerial roles, limited visibility, and inadequate recognition for their contributions. Women within the CCI serve as catalysts for change, altering existing structures, serving as international role models, and amplifying diverse voices in various artistic platforms. Despite their transformative impact, women cultural and creative professionals, practitioners, and entrepreneurs lack adequate global representation to advocate for the challenges they encounter.

To address this gap, the proposal suggests establishing a Women's Creative Network, fostering South-North, North-South, and South-South dialogue to enhance and advocate for women's economic and social participation and diversity within the CCI. The objective is to form a global feminist advocacy group comprising successful creative entrepreneurs spanning music, fashion, design, film, and animation. As ambassadors, these women would articulate the concerns of the Women's Creative Network in their respective countries.

The Women's Creative Network can promote activities centred on experience exchange and equitable collaboration between the Global North and South, seeking to improve the employment and income prospects for women in the sector. In addition, in-country programmes and/or events can act as local or regional hubs that focus on community-oriented issues and ideas. The desired goal of strengthening and advocating for the economic and social participation of women in CCI could be approached on two levels: the political and the national/regional level. As the Women's Creative Network would encompass a variety of sub-sectors and regions, its aims and content must strike a balance between the overarching (i. e. not too narrow to be relevant to all members) and the specific (i. e. concrete offerings for its members to address existing challenges). Therefore, two primary focus areas could be considered:

1. **Political visibility, encompassing the development of action plans for gender equality and women's empowerment, participation in advocacy events, and training initiatives to enhance the enabling environment;**
2. **Exchange and training opportunities, including leadership training, safe spaces for leaders, and country-specific initiatives such as the FemLab (see chapter [5.4.6. Building Safe Community Spaces for CCI Professionals, Practitioners and Businesses](#)).**

Other Recommendations

To enhance the global standing of the CCI, international DC organisations may explore the following interventions. However, it is advisable to conduct a comprehensive analysis before delving further into these areas:

1. **Collection of statistical data:**

Addressing the challenges previously mentioned relating to data accessibility for informed decision-making is crucial. The varied classifications of the CCI and limited understanding of the sector's economic impact pose significant obstacles. International DC organisations aiming to address this issue may consider efforts to standardise various international frameworks. Advocating for the adoption of a harmonised framework in partner countries could streamline data collection processes, facilitating informed policy-making, and fostering international comparability.

2. Consolidation of the Creative Economy Alliance:

International DC organisations aiming to enhance the global prominence of the CCI may consider reinforcing the Creative Economy Alliance's role, beyond knowledge management and networking. This expansion could encompass advocacy initiatives at the national level within the mandate of the Alliance. Additional recommendations are available in chapter [5.2.1. Building Global Advocacy Networks for the CCI](#).

National Level

Piloting the set-up of competence centres:

International DC organisations may consider establishing centres similar to the CCI Centre of Excellence in Germany. The centre of excellence concept is a central point of contact for the CCI and related institutions (e.g. associations). It offers information on the sector's latest developments, showcases the value of innovative thinking and methods from the CCI for other areas, and catalyses the creation of forward-looking entrepreneurial solutions to address societal challenges, including the climate crisis and digitalisation. The centre of excellence also incorporates a data centre to enhance the sector's economic visibility.

Other Recommendations

To enhance the impact of the CCI within partner countries, international DC organisations may contemplate the following interventions. However, it is advisable to conduct a comprehensive analysis before delving deeper into these areas:

1. **Implementation of the UNESCO Fair Culture Charter:** International DC organisations may offer guidance to government partners on implementing the [UNESCO Fair Culture Charter](#), which includes the introduction of government incentive schemes and changes in legislation to promote fair culture.
2. **Standardisation of entrepreneurial and digital skills:** Entrepreneurial and digital skills remain significant skill gaps in the CCI. However, many training programmes on these skills use different methodologies and reach different depths of training. To address this,

international DC organisations interested in enhancing skills frameworks could focus on standardising entrepreneurial and digital skills training. This might involve introducing academies, accredited study programs, and other measures to ensure consistency in training methodologies.

3. **Facilitating market access:** Market access is crucial for cultural and creative professionals, practitioners, and entrepreneurs in the Global South to expand their businesses and create income and new jobs. Therefore, international DC organisations could further engage in this area through initiatives facilitating market access and the development of multi-stakeholder partnerships facilitating regular exchanges between practitioners from the Global South and the Global North, encouraging co-creation opportunities between companies.
4. **Set-up of safe spaces:** Safe spaces provide environments for women or other vulnerable groups to explore their creative potential, cultivate leadership skills, and receive specialised training in cultural and creative entrepreneurship. These spaces aim not only to facilitate economic empowerment but also to serve as hubs for fostering network building, knowledge-sharing, and advocacy for gender equality. If physical structures are not suitable, international DC organisations could assist creative partner organisations in hosting Safe Space Conversation Circles. The goal of these circles is to create liberating spaces for individuals to nurture their growing sense of gender responsiveness in community with others. The intervention focuses on creating gender awareness based on individual lived experiences, preparing staff to consider gender empowerment within the organisation and/or externally.
5. **Systematic access to funding:** As mentioned earlier, access to finance is a specific challenge for cultural and creative professionals, practitioners, and entrepreneurs. While some new funds (e.g. IFC) also provide funding for the CCI, the issue needs to be addressed more systematically. International DC organisations could facilitate the establishment of new funds or collaborate with existing impact funds to extend their funding to the CCI systematically. A method that is becoming more and more widespread is crowdfunding, particularly in



the form of reward-based online crowdfunding. However, in numerous countries, there is a lack of understanding about how this method operates, and access to prominent international platforms is restricted for various reasons. To address this gap, the Global Project CCI has developed a web-based training programme (e-learning course). This course provides insights into the mechanics of crowdfunding, guides on selecting suitable platforms, and gives instructions on creating a campaign with consideration for local contexts. International DC organisations are encouraged to promote the programme to enhance knowledge and understanding of crowdfunding for cultural and creative professionals, practitioners and businesses. The course has been created as an Open Educational Resource (OER) under the Creative Commons CC BY-NC License, which allows institutions and organisations to share and adapt the material, under certain conditions.

- 6. NFT:** The emergence of NFTs in the CCI has instigated significant transformative shifts. NFTs empower artists to tokenise their digital creations, facilitating direct sales and trades with collectors. Furthermore, the underlying blockchain technology employed by NFTs decentralises ownership and distribution of digital assets, concurrently bolstering intellectual property (IP) protection. This is achieved through the transparent and immutable recording of ownership and provenance on the blockchain. However, the awareness of this subject remains limited among many organisations within the CCI that support cultural and creative professionals, practitioners, and businesses. Consequently, international development organisations may find value in raising awareness regarding the opportunities and limitations associated with NFTs. There is a particular potential of engaging with intermediary organisations, enhancing their capacity to effectively guide cultural and creative professionals, practitioners, and businesses through the dynamic landscape of NFTs. This involves providing support in key areas, including the intricacies of minting NFTs, establishing digital wallets, and navigating blockchain platforms. The Global Project CCI has developed several webinars on the topic, inclusive an all-women training on NFTs to be found on the YouTube channel of the CCI programme.

FOOTNOTES

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Photo: Goethe-Institut/perFORM Music Incubator

Published by:
Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

Registered offices: Bonn and Eschborn, Germany

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53113 Bonn, Germany

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Compiled by Eileen Trenkmann
Based on research and implementation experience from the project
Cultural and Creative Industries (CCI)

Design and Layout:
TINKERBELLE GmbH, Berlin

Bonn, 2024

Published by

giz Deutsche Gesellschaft
für Internationale
Zusammenarbeit (GIZ) GmbH

On behalf of



Federal Ministry
for Economic Cooperation
and Development