



BAYIMBA



MAPPING THE CURRENT LANDSCAPE OF THE CULTURE AND CREATIVE INDUSTRIES IN UGANDA

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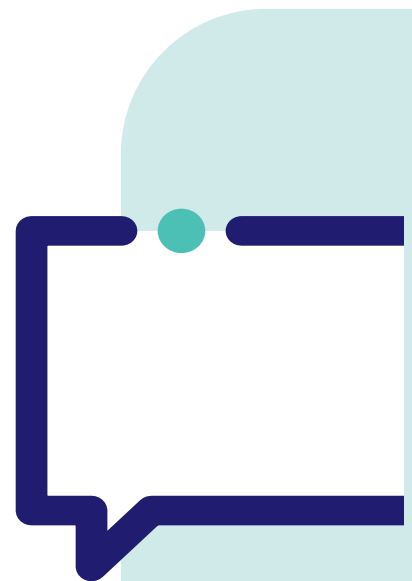
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Contents

Creative technology photo: Hendrick Aebabule	02
1.0 Introduction	05
1.1 Paradigm Shift	06
2.0 Summary of the Purpose, Objectives and Questions	06
Participant with a headset at a Gulu VR Workshop by VR Guy Uganda. Photo by Hendrick Aebabule	07
2.1 Purpose	07
2.2 The Objectives of the Research	07
2.3 Questions	08
3.0 Methodology of the Research	09
3.1 Scope of the Study	07
3.2 Study Design	10
4.0 Map of Key Clusters of the CCIs Growth Opportunities in Uganda	11
4.1 Current State of Uganda’s Cultural and Creative Industries	11
4.2 Current Investments towards Development and Support Initiatives of Creative Businesses	24
4.3 Emerging and with Strong Implementation Capacity in the CCIs	25
4.4 Growth Opportunities from CCI Clustering and Networks	27
5.0 Synthesis of Findings, Recommendations and Conclusion	31
5.1 Key findings	32
5.2 Recommendations	32
5.2.1 Stimulate Growth and Investment for the CCIs in Uganda	32
5.2.2 Target areas for high impact on creative enterprise environment	33
5.2.3 The CCI ecosystem	34
5.2.4 The Next Steps for the Collaborative Sectors	36
5.3 Conclusion	36
6.0 Annexes: Data Collection Tools	37
ANNEX 1: FOCUS GROUP DISCUSSIONS Guide	37
ANNEX 2: In-depth interview guide with Capacity Building Organizations in in domain of arts and CCI Development	39
ANNEX 3: In-depth interview guide with donors active in domain of arts and CCI Development	40
ANNEX 4: SURVEY QUESTIONNAIRE	41



1.0 Introduction

This report summarises the results of the research commissioned by The British Council, Bayimba Cultural Foundation, Cross Cultural Foundation Uganda, Kuonyesha Arts Fund, and Ministry of Gender, Labour and Social Development to map the current landscape of the Culture and Creative Industries (CCIs) in Uganda.

The aim of this study is expected make an analysis of selected CCIs in Uganda, including specific post-COVID 19 shifts and digital-led opportunities with a focus on CCI practitioners between the ages of 18 and 35. The study conducted via desktop research, in-depth interviews, Focus Group Discussions (FGDs and online survey, between July 2023 and September 19, 2023, highlights the following:

- The nature of employment for the CCIs in Uganda;
- Present needs and changes required in selected CCI sectors in Uganda;
- A SWOT analysis of selected sectors namely: Fashion, creative technology, film, literature, performing arts and the visual arts and crafts in Uganda;
- The business models and scaling opportunities in Uganda;
- Current investments into development and support initiatives directed towards creative businesses in Uganda;
- Emerging and with strong Implementation capacity the CCIs in Uganda;
- Clustering of the Culture and Creative industries opportunities and networks in Uganda;
- Innovation, sustainability and multi-disciplinary practice related to future-facing business and opportunities for Uganda's CCIs;
- a synthesis of findings and recommendations;
- and finally, a conclusion with a vision for a national theory of change for the CCI landscape in Uganda.



Model showcasing Demin Cartel, Ugandan Fashion brand case at the British Council during the Fashion Policy Roundtable held in July, 2023.

Photo by Willam Kane Olite

This study proposes a shared vision for a national theory of change for the CCI landscape in Uganda that builds on the key findings and recommendations.



Vision:

To adopt a holistic approach to develop the CCIs in Uganda that focuses on policy and regulatory activation, capacity building, investment and infrastructure, institutional strengthening and partnerships for development.



1.1 Paradigm Shift

Based on the findings from the primary data of the study and an analysis of Bayimba Foundation’s paper, [ART, CULTURE and CRISES Opportunities and Challenges in Uganda](#), this study proposes a shift away from the static approach to culture – as something from the past to recognizing other aspects and roles of culture, embracing both heritage and tradition and the contemporary. The study adopts the view that culture as a dynamic force in transforming society whereby a diversity of cultural expressions informed by [the 2005 UNESCO Convention](#) are a source for innovation and that produce both social and economic benefits. This means Uganda should embrace the concept

of the [creative economy](#) which places emphasis on valuable (paid-for) goods, services and activities of a cultural, artistic or heritage nature whose origin lies in human creativity, whether past or present. The creative economy places emphasis on economic systems in which value is derived from [original and creative ideas](#). It is the knowledge-based economic activities upon which the ‘creative industries’ are grounded. This means the creative value chain and market development should become key priorities for the CCIs.



2.0 Summary of the Purpose, Objectives and Questions



Participant with a headset at a Gulu VR Workshop by VR Guy Uganda.

Photo by Hendrick Aebabule

2.1 Purpose

Based on this background, the British Council, Bayimba Cultural Foundation, Cross Cultural Foundation Uganda, Kuonyesha Arts Fund, and Ministry of Gender, Labor and Social Development appointed Culture and Development East Africa (CDEA) to undertake the research for Mapping the Current Landscape of the Creative and Culture Industries in Uganda. This consultancy is expected to conduct an analysis of the CCIs in Uganda including specific post-COVID 19 Shifts and digital-led opportunities .

The mapping report will be used to inform the current post-COVID state and trends in Uganda's culture and creative industries as well as the British Council programming and investment strategies. British Council strongly believes that the purpose of this research is to offer critical thinking, data analysis and recommendations that are impactful and implementable.

The research focused on mainly CCI practitioners between ages of 18-35.

2.2 The Objectives of the Research

The objective of this research, therefore, seeks to provide:

- A detailed analysis of the current state of Uganda's culture and creative industries including the typologies, characteristics, business models and scaling model opportunities/present needs and changes
- A detailed analysis on current investments into development and support initiatives directed towards creative businesses
- A detailed analysis of sector players both emerging and with strong Implementation capacity (potential collaborators)



- Analysis of clustering of the Culture and Creative industries opportunities and networks industries
- Identification and analysis of innovation, sustainability and multi-disciplinary practice related to future-facing business and opportunities for Uganda's CCI; Synthesis of findings and conclusions
- Recommendations on target areas for high impact on creative enterprise environment.
- Recommendations on adequate policy and regulatory frameworks, capacity development, and institutional and infrastructure development
- Recommendations on the next steps for the collaborative sectors to take/engage as a shared vision for the national theory of change

2.3 Questions

- What is the current state of Uganda's culture and creative industries, including the needs and changes?
- What are the current investments into development and support initiatives directed towards creative businesses in Uganda?
- What sector players both emerging and with strong implementation capacity exist in Uganda?
- What growth opportunities through CCI clustering and networks exist in Uganda?
- What innovation, sustainability and multi-disciplinary practice related to future-facing business and opportunities for Uganda's CCI?



3.0 Methodology of the Research

Musician Striker Tresino performs during an event in Gulu city

This research took place from June 1 2023 – September 19 2023, using mainly a qualitative approach that involved the collection and analysis of both secondary and primary data related to the CCI landscape in Uganda.

3.1 Scope of the Study

The scope of the assignment was to:

Establish a map of key clusters of the Culture and Creative Industries (CCIs) growth opportunities -across Film (TV, audio-visual and Animation), Fashion

and literature, Visual and Performing Arts including reviewing value chain opportunities, access to market and the growth of digital content.

3.2 Study Design

The study was undertaken by a lead researcher from Culture and Development East Africa (CDEA) who analysed secondary data from : The Constitution of the Republic of Uganda, 1995 The National Action Plan On Culture And Creative Industries Of Uganda (2010/11 – 2014/15 as well as 2015/16 -2019/20), the Uganda National Cultural Policy (Draft 2020) and the and recent study of the Culture and Creative Industries in Uganda (February, 2023) and papers on CCIs in Uganda such as Art, Culture And Crises Opportunities and Challenges in Uganda .¹ Other Acts and regulations that were consulted include: The Press and Journalists Act (1995), The Uganda Communications Act 2013 (amended 2017), The Uganda National Cultural Centre 1965 Amendment Act, Copyright and Neighbouring Rights Act (2006), Copyright and Neighbouring Rights Regulations (2010)

To fill any gaps in the literature review and make a deeper assessment, structured interviews with key informants the CCI sector in Uganda were held. The lead researcher had a contact list and in total 9 key informants in the capacity building and donor space were interviewed. In addition, 120 Focus Group Discussions (FGDs) with CCI practitioners were carried out in five cities in Uganda covering the

following sectors: Arua -music and film; Gulu -music and film; Kabale -visual arts and traditional music; Kampala -the creative technology, Film (TV, audio-visual and Animation), literature and Fashion & Design and Mbale -music (traditional and contemporary) and visual arts and crafts.

In addition, the study carried out a mapping survey with CCI practitioners to establish ecosystem strengths, weaknesses challenges and opportunities. 79 CCI practitioners responded to the in the FGDs survey questionnaire. The literature review, in-depth interview responses, FGDs and survey data was analysed and established the current post-COVID state and trends, including and digital-led opportunities in Uganda's CCI landscape.

The mapping study findings form the basis for providing recommendations for areas of high impact on creative enterprise environment; adequate policy and regulatory frameworks, capacity development, institutional and infrastructure development as well as partnerships for development, with a shared vision for a national theory of change the CCIs in Uganda.

¹ <https://bayimba.org/world-culture-day-20/>

4.0 Map of Key Clusters of the CCIs Growth Opportunities in Uganda

4.1 Current State of Uganda’s Cultural and Creative Industries

Uganda’s cultural and creative sub-sectors contains multiple subsectors. For the purpose of this research, 5 specific subsectors were selected namely : Fashion, creative technology, film, literature and publishing, music and performing arts and the visual arts and crafts. This section provides a detailed analysis of current state of Uganda’s culture and creative industries including the typologies, characteristics, business models and scaling model opportunities/present needs and changes. Table 1 below provides a sample of the key players in providing technical and business support to the CCIs in Uganda.



Scene from a movie in Arua: Photo credit WHO

Typographies

Table 1: Technical and Business Support Typology of Selected CCIs in Uganda

Typography	Categories
CREATIVE HUBS/MAKERSPACES/ CO-WORKING SPACES/ RESIDENCES	<ul style="list-style-type: none"> • MoTIV • Design Hub Kampala • 32° East Uganda Arts Trust

PRIZES/ AWARDS	<ul style="list-style-type: none"> • The Abryanz Style and Fashion Awards • Uganda Hip Hop Awards • Janzi Awards • The Uganda Music Awards • Uganda Press Photo Awards
FUNDING	<ul style="list-style-type: none"> • Africalia • British Council • Kuonyesha Art Fund • Mastercard Foundation • Open Society Foundation • Uganda Communication Commission • Fashion Impact Fund
TECHNICAL TRAINING AND DEVELOPMENT	<ul style="list-style-type: none"> • MOTIV • Bayimba Academy • Uganda Communication Commission • Kampala Film Development Foundation • African Writers Trust • FEMRITE • 32° East Uganda Arts Trust
SME SUPPORT / INCUBATION AND ACCELERATION	<ul style="list-style-type: none"> • MOTIV
TRADE SHOWCASING/RETAIL SHOWCASING	<ul style="list-style-type: none"> • Kampala Film Development Foundation • African Writers Trust • FEMRITE • 32° East Uganda Arts Trust
EVENTS/CONCERTS & FESTIVALS	<ul style="list-style-type: none"> • Kampala Fashion Week • The Uganda Film Festival • The Ngalabi Short Film Festival in Kampala • Amakula Film Festival in Kampala • African Film Festival in Kabale • Pearl Film Festival in Kampala • Gulu International Film Festival • Nile Diaspora, Jinja Major Cinemas <ul style="list-style-type: none"> • Century Cinema • Cinema Magic • Ham Cinemax • Numax Cinema

<p>EVENTS/CONCERTS & FESTIVALS</p>	<p>Digital Platforms</p> <ul style="list-style-type: none"> • Showmax • NetFlix • DSTV • FEMRITE Week of Activities • Uganda International Writers Conference • Writivism Literary Festival • The Uganda International Book Festival • Mashariki Literary and Cultural Studies Conference • Bayimba International Festival of the Arts • Kampala International Theatre Festival • Uganda National Primary Schools Performance Arts Festival • Lunkulu Reggae Fest • DoaDoa East African Performance Arts Market • Nyege Nyege Festival • KLA ART, Kampala Contemporary Art Festival
<p>POLICY AND REGULATION</p>	<ul style="list-style-type: none"> • Ministry of Gender, Labour and Social Development • Ministry of Education and Sports • National Planning Authority • Local governments • Uganda Communications Commission • Uganda Registration Services Bureau • Uganda National Cultural Forum

Characteristics

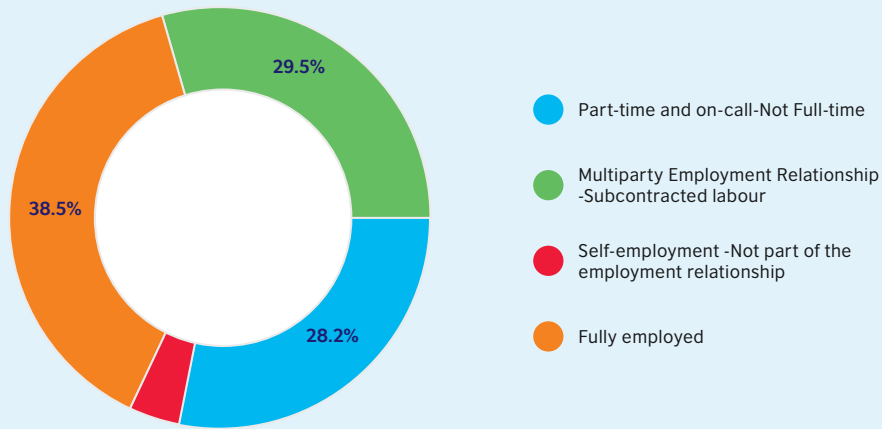
The COVID-19 pandemic illustrated that the CCIs that are most dependent upon physical experiences at venues and sites have suffered the sharpest economic losses in relative terms, in Uganda. While the government provided the CCI sector with UGshs 5.6bn COVID-19 relief funds², not all artists received the funding and the post-COVID-19 era continues to exude vulnerability of the CCI sector. 79 CCI practitioners that were consulted for

this report pointed out that the five top characteristics that best describe their sector are:

- 1) Characterized by informality;
- 2) Has micro enterprises and insecure forms of employment ;
- 3) Lack of routine data collection by government ;
- 4) Inadequate social security coverage and
- 5) Precarity and uncertainty.

² Parliament of Uganda (2023) 'A study of the Culture and Creative Industries in Uganda,' Department of Research Services, Parliament of Uganda.

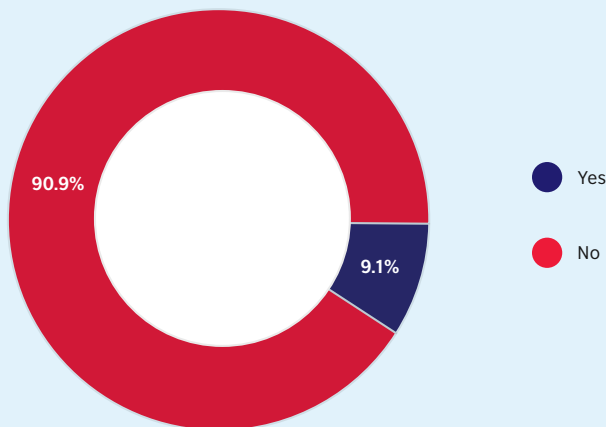
Figure 1: The nature of employment



The survey indicates that most CCI practitioners are self-employed (38.5%), while 29.5% are fully employed. However, most of the FGD participants indicated they were either part-time workers or self-employed. 90.9% of the survey respondents as well as all the FGD participants indicated that there is no

minimum wage / minimum remuneration for the cultural or creative occupations. The FGD participants also indicated that there was no minimum wage in their cultural or creative domains. For the survey participants who indicated there is a minimum wage, it ranges from UGS 150,000 -500,000.

Figure 2: Is there a minimum wage for cultural and creative occupations?



In addition, 120 CCI practitioners that were involved in the FGDs for this study, highlighted the following characteristic of

the fashion, creative technology, film, literature and publishing, music and performing arts, visual arts and crafts.

Fashion

For the fashion sector, most jobs require skilled labour e.g., tailors, and are highly informal. The conditions are not favourable because there is low pay for most fashion workers, especially those that work in large production houses. There is no respect from the managers as they require clothes to be made anytime. While there are no set standards and norms in the fashion industry, on a positive note, there is increased push for sustainable fashion practices. However, most workers do not enjoy social protection.

Technology is used in marketing (through social media), sales and distribution, accounting and finance management, digital/ AI Fashion shows, Illustration for fashion designs and prints including pattern and visualizing and online fashion exhibitions. A key learning from the COVID-19 pandemic was that designers need to enhance their digital competencies to thrive even during pandemics, as well as have some savings to cover emergency situations. However, in order to safeguard the industry from future pandemics, there is need to establish a Fashion Emergency Fund.

Below is a SWOT analysis for the fashion sector:

<p>Strengths</p> <p>Authentic products that enhance one’s personality and beauty; showcases ones identity and story; it’s the time for Africa to shine through its fashion industry.</p>	<p>Weakness</p> <p>Lack of strong fabrics; expensive quality fabrics; no machinery to produce on large scale; resource constraints to run a successful fashion business; poor working conditions for fashion designers, exorbitant taxes imposed on fashion businesses; lack of skilled manpower ; small local markets for fashion products ; unsustainable fashion practices; exploitation of fashion workers; Lack of integrity by some fashion designers; unprofessionalism.</p>
<p>Opportunities</p> <p>Employment opportunities; Opportunity for the youth to broaden their design thinking skills.</p>	<p>Threats</p> <p>Fast Fashion that is not environmentally friendly; Second hand clothing infiltration narrows market for high fashion; Lack of market for locally made products; Duplicate products from China; unfavourable government policies; lack of markets has made many designers close their shops and fashion houses</p>

Creative Technology

Most jobs in the creative technology sector are with international organizations like Google, Disney, Netflix, Spotify, SoundCloud, Apple Music, Sony Music among others. These pay well compared to local companies that hire talent from this creative pool. However, the work conditions are not favourable for most creative technology workers hired by local companies. In addition, most of these companies are startups and do not have social protection mechanisms and policies. Due to the expense of the software, they need, some graphic designers use pirated the software. Furthermore, standards and norms in the creative technology scene are set by each individual brand. In addition, males dominate this sector but increasingly more females are coming up especially with the many programs that are engaging females that code and are in Tech. There’s a lot of unfavourable pay for young women in this sector that hinders most young women from competing favourably.



Below is a SWOT analysis for the fashion sector:

Strengths

Helping to “disrupt” the way people today interact with computers, and usher in a more integrated, immersive experience.

Weakness

Limited access to quality tools and software; inadequate technology infrastructure to support high level creative technology productions ; some educators have complained that creative technology tools, though “widely available”, are difficult to use for young populations.

Opportunities

Employment opportunities; opportunity for the youth to broaden their technology skills.

Threats

Government taxes and censorship; exorbitant internet cost; digital divide along urban/rural lines

Digital is central to creativity in this sector and it is applied in the creation and production phases of the value chain. A key lesson from the COVID-19 pandemic is that the technology sector and its outputs are fast-rising to make it easy for humans to connect and interact in real time. The proposed safeguards that need to be put in place to protect CCI businesses and practices from future pandemics include: Investment in technology infrastructure to make digital technology accessible to all as well reducing the cost of internet.

Film

For the film sector, most jobs in the film sector are temporary and contract based (freelance). In Northern Uganda and West Nile regions, many filmmakers survive on NGO project-based filmmaking, while others are engaged in advocacy gigs. However, most film projects are self-funded with poor financing and the crew members are employed on a per project basis. In addition, there is lack of proper distribution and exhibition platforms. However, Kibanda Xpress a Video-on-Demand channel, addresses the distribution challenge for the Ugandan market. The app is offered in collaboration with Albayan Media Limited, YOTv the platform provider, and the Association of Core Film Producers Uganda Limited (PearlWood), the content developer.

However, there is basically not much attention given to enhancing the favourable working conditions since most of the film production houses operate informally. In West Nile many filmmakers work with sub-standard film equipment because they have no access to modern technology. This puts them in jeopardy as they cannot compete nationally, regionally or internationally. There are no professional associations that focus on labour issues such as demanding for favourable working conditions for filmmakers in Uganda. Basic film production standards are in place but most film producers violate them. For example, signing of contracts is now a standard, however, there is no specification on the work hours per day. Nevertheless, some filmmakers are guided by strict job descriptions as the standard for their film projects. On the other hand, some film actors are ethically inappropriate and unprofessional in their dealings. For instance, some actors can commit to being cast in more than 4 films and all being shot

at same time, so they compromise on other productions. Worse still, there is no social protection to support film actors when sick, on maternity leave, or when working in unsafe and precarious environments. Women in film are exploited because the industry favours “beautiful” faces as opposed to what they can bring to the table. There is also a stereotype that female producers are not competent. In addition, there are allegation of sexual exploitation of female actors and models.

The film sector is digital compliant in the areas of creation and production stages as well as marketing through social media platforms and websites. For example, actors, even auditions can be done online, while producers can submit films to film festivals digitally through <https://filmfreeway.com>. A key lesson from the COVID-19 pandemic was it exposed filmmakers to the opportunity to content creation using mobile phones, collaboration and distribution through TikTok, Instagram and other social media. In addition, it introduced the culture of working online with different partners. The pandemic also proved that “Government is not your mother”. As a result, filmmakers proposed that in order to safeguard against future pandemics, the industry should self-organize to establish emergency funds for the future.

Below is a SWOT analysis for the film sector:

<p>Strengths</p> <p>A thriving local industry over the last 10 years; untapped potential of the sector in the regions; Change narratives and untold and untapped stories</p>	<p>Weakness</p> <p>Lack of payment by consuming audience; skills gaps; informality of doing business that’s unprofessional; lack of authentic storytelling; technological challenges; exploitation of actors; lack of sustainable business models; lack of investment and funds; lack of skilled filmmakers; Limited funding to support consistent production of content.</p> <p>Inadequate technical skills and knowledge in film production, sexual harassment of female film makers; negative perception of film makers by the public, most opportunities to support film makers are based in Kampala and not rolled out regionally; Infiltration of foreign movie from Nigeria and Hollywood that has become a standard for fans, limited creativity among the film makers in the region. They do more of copy and pasting; NGOs working in the in region prefer hiring film makers from Kampala because they have better quality work; No cinemas facilities for showcasing in the regions; piracy; No access to modern film equipment will always lead to poor quality production.</p>
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<p>Opportunities</p> <p>Employment; grants for filmmaking; unique folk stories and culture from the regions; local TV stations that can air content produced in the regions; new untapped markets in South Sudan and Congo that are yearning for West Nile content; local musicians who can produce unique sound tracks</p>	<p>Threats</p> <p>Unfavourable government policies that do not support creative arts innovations; competition from foreign film makers; cultural indifferences toward art; existence of industry gatekeepers; censorship; lack of proper film arenas; no film studios in the regions; corporation exploitation by taking a big share of the content and lack of access to these films; Artificial Intelligence a threat to human creativity</p>
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Literature and Publishing

Most jobs in the literature sector, are with publishing houses and newsrooms employed as either editors, translators, columnists or writers. Some of the jobs have low pay, while others are part-time and on-call. However, in publishing houses and newsrooms there are standards and norms in form of editorial policies and house styles. There are social protection mechanisms and policies in some publishing houses. However, many authors are self-published and their income is based on sales from their self-marketing strategies that do not cover social protection costs.

The rapid growth of mobile phones usage and internet connectivity in Sub-Saharan Africa have enabled a new kind of opportunity – digital publishing. E-books and other forms of digital literature have also emerged to suit readers' abilities and interests. However, the COVID-19 pandemic did not space the sector and the practitioners argue that there is need for an emergency fund to safeguard the sector from future pandemics.

Below is a SWOT analysis for the literature sector:

Strengths

Literature acts as a form of self-expression for each individual author. Some books mirror society and allow us to better understand the world we live in.

Literature allows a person to step back in time and learn about life on Earth from the ones who walked before us. We can gather a better understanding of culture and have a greater appreciation of them. We learn through the ways history is recorded, in the forms of manuscripts and through speech itself

Existence of writing and editorial capacity building programmes; digital publishing platforms; writers and book festivals

Weakness

Lack of professional book editors; poor royalty management systems; small domestic market for Ugandan books;

Increased interest in African books published by professional editors in the West and not those published in Uganda; limited capacity of existing publishers to trade in book licensing rights

Opportunities

Opportunity for the youth to broaden their storytelling skills; self-publishing;

Threats

A lack of financing is slowing action to grow the Ugandan publishing sector and hindering the ability of organizations to fulfil their strategic objectives; lack of a quality publishing house to attract foreign investors

Piracy (both in print and digital book formats) is also a threat to the sector.

Music and Performing Arts

For the music sub-sector, the nature of employment for most musicians is either self-employment (Not part of the employment relationship) or temporary employment based on casual work with low pay or no pay-exploited labour, with no social protection. The sector is mostly male-dominated. In West Nile, some musicians make verbal agreements with their managers and producers on terms of reference but most are not honoured.

While traditional groups are organized through associations to access gigs, for contemporary musicians the space is competitive and requires hard work to promote their work. There are a few artists who are under artistic management and this creates animosity among musicians in the struggle for recognition. Furthermore, contemporary female musicians and dancers face sexual harassment and belittling, while the traditional dancers and musicians have some public respect for promoting traditional values. The working conditions for contemporary musicians is not conducive because some members of the public pirate their music or prefer to access music for free. In addition, many contemporary musicians in cities like Mbale face the pressure of fitting into their promoters' brand profiling in an effort to make them as successful as musicians in Kampala or in the West. In addition, it is difficult for a popular musician from northern Uganda to become popular in Kampala and central Uganda, if they lack a marketing and promotion budget. Furthermore, some radio presenters who are the gatekeepers in media houses,

demand for payment from the musicians for their music to be played on the radio. Musicians only get their music played on TV, when the presenter considers it promising. In West Nile, the music gigs are seasonal and mostly at peak during school holidays and during festival seasons such as Easter, Christmas, Eid and other public holidays. However, a few musicians are trying out shows during the off-peak season though the proceeds are small.

The benchmark for contemporary music and music videos is currently set by international standards. As a result, production has improved both visually and audio-wise with the software and hardware used. However, copyright awareness is still low especially for artists from beyond Kampala. In addition, in cities outside central Uganda many managers and promoters have no experience of conducting business in the sector. Furthermore, the industry has very few producers and the available ones are under paid and overworked. However, on the positive side, digital technology is used in improving the quality of music production. Nevertheless, digital also has the challenge of reinforcing piracy through easy sharing of music on social media platforms such as WhatsApp.

While music was a source of social inspiration during the COVID-19 pandemic, the business models used were not beneficial to all. Music that was shared via WhatsApp did not economically benefit the musicians. There is need for future safeguarding on copyrighted content in the digital space.

Below is a SWOT analysis for the film sector:

Strengths

Digital distribution of music.
Different choreographies for showcasing Uganda's traditional performances;

Weakness

Emerging artists do not have airplay with radio and TV stations; radio stations and media houses do not pay for music but rather play it for free; sexual harassment of female musicians; poor payment offers after performance and also no transport facilitation to performance venues.; lack of safeguarding measures for females after late performances; there is too much competition with other cultural groups for traditional music;

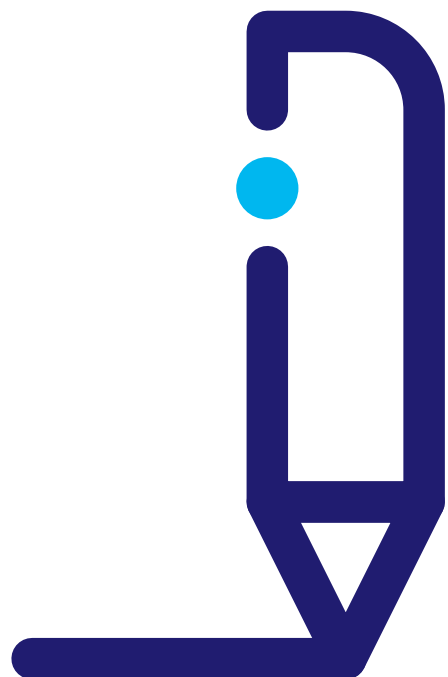
the perception that you must be from central Uganda to make it; Lack of investment in the sector from corporate players; inadequate capital to scale as music production is an expensive venture; no access to music-friendly financial credit services; limited access to quality audio and video production facilities; unprofessional music managers and promoters; other regions of Uganda do not promote music from West Nile; musicians only have one source of revenue through stage performance and have not explored other options of selling music; internet is expensive to support online streaming, no insurance; drug abuse by musicians is high leading to mental health problems

<p>Opportunities</p> <p>Unique culture and sounds from the regions,</p>	<p>Threats</p> <p>Political interference of the music industry; Copyright infringement; cultural stereotypes, high taxation by local authorities</p>
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Visual Arts and Crafts

For the visual arts and crafts sector, most employment is self-employment (Not part of the employment relationship) or Part-time and on-call employment by a company that pay on commission basis. Sometimes commercial art which feeds into the tourism market is rushed to meet client demand. Many handcrafters work from home and have competing demands from household chores. The visual arts sector suffers from lack of professional curators and steady markets. There is lack of standards in the craft sector and this becomes a challenge in meeting international market standards. There is no social protection for the visual artists and handcrafters.

Digital technology is applied in the visual arts and craft sector through online marketing. A key lesson for the craft sector practitioners faced during the COVID-19 pandemic was the need to stock materials. They proposed that safeguarding the sector from future pandemics would require them to form a craft Savings and Credit Co-operative Society (SACCOS).



Below is a SWOT analysis for the literature sector:

<p>Strengths</p> <p>Unique local talent in the visual arts; existence of tourist market for visual arts and crafts; existence of renown visual artists who can mentor upcoming visual artists; use of local/natural for crafts in a particular geographical location; existence of contemporary art residencies</p>	<p>Weakness</p> <p>Costly materials for visual artists; high taxes; limited local market; few galleries especially in the regions; few capacity building programmes for visual artists; lack of market for crafts; scarcity of materials due to climate change; pricing is a problem; lack of professionalism in craft sector logistical problems; poor storage of crafts</p>
<p>Opportunities</p> <p>Self-employment; applied skills in other industries -Communication and branding, advertising etc; Market through tourism and art collectors; Microfinance schemes to offer loans to women craft groups</p>	<p>Threats</p> <p>Rapid change in consumer preference; climate change and plagiarism; Limited public interest in the visual arts</p>

Business models and scaling model opportunities

The section, highlights the business models and scaling opportunities exist for fashion, film, literature and publishing, music and performing arts, as well as visual arts and crafts.

Fashion

For the fashion sector, the following business model and scaling opportunity exists:

Physical + Online stores: Bold in Africa is an enterprise-driven fashion outlet at

Kisementi, Kampala, that retails high fashion pieces from different parts of Africa. The enterprise is working at establishing an online store to reach more designers on the continent, while keeping the physical store as well.

Film

For the film sector (TV, audio-visual and Animation), the following business models and scaling opportunities exist:

Streaming platforms: Kibanda Xpress is a Video-on-Demand channel that showcases how the convergence of technology and content creators addresses film distribution challenges. Mergers between various streaming platforms in the East African region is an opportunity for scaling.

creative digital content as a tool to promote corporate brands. For example, NBS TV has partnered with Wowzi, a Kenyan platform that connects influencers to corporate brands, to launch the NBS Wowz app.³ This presents an opportunity for audio-visual incubators or hubs at regional level (Central, Eastern, Northern, West Nile, Western) that will support the development of quality content for social media influencers.

Commissioned work: Producing content (series, documentaries, feature films) for streaming services such as DSTV and Netflix

Creative marketing solutions: Using

³ <https://twitter.com/nextcomug/status/1692560478822646064>

Literature and Publishing

For the literature sector, the following business models and scaling opportunities exist:

The self-publishing model: With the few established publishing houses focused on textbook publishing in Uganda, self-publishing creative literature and biographies has taken centre stage and attracting a local readership. Although it is associated with poor quality standards, if the required capacity development is injected into the modelled it can be professionalized and scaled to up to create more job opportunities for young creatives in the book value chain. African

Writers Trust (AWT) aims strengthen this model through ongoing capacity building in Uganda and beyond.

Digital books. Publishing books as ebooks and audio books is a business model that addresses the shipment costs of the physical books. However, for this to be a viable business model that is scalable, the book industry should interface with the tech innovation space in Uganda to develop e-book platforms based on based on blockchain technology. Such innovations are already being tested by startups such as Publica and Bookchain that use Ethereum blockchain, which supports smart contracts.⁴

Music and Performing Arts

For the music and performing arts, the following business model and scaling opportunity exists:

Entertainment model: Musicians use this model at concerts, festivals or through performing in bars and events such as weddings. Community entertainment groups used this model at various events including weddings, official functions and through community tourism.

Mixed funding model: Bayimba Foundation is

in phase 1 of establishing a unique cutting-edge ecologically sensitive creative space to accommodate Bayimba's growing annual festivals and events, arts education for all and advocacy activities that will contribute to the long-term sustainability of Uganda's creative sector. The foundation will use a mixed funding model, with private and public funded capital, while its operating costs will come from mixed revenue income generated from exhibition events, hospitality, space rental, social enterprises, charities, corporate sponsorships and legacy giving.

Visual Arts

For the visual arts, the following business model and scaling opportunity exists:

The non-profit model: In order to address the infrastructure gap in the visual arts space, 32° East | Ugandan Arts Trust with support from development partners and

independent philanthropists is building the first non-profit contemporary art centre in Kampala. So far, the organization has built 4 studios and a library. Scaling of the infrastructure development, includes building two more studios, establishing a well-resourced learning centre and library, a purpose-built gallery, accommodation, gardens, a cafe and shops.

Present needs and changes

The section, highlights the presents needs and changes required in the fashion, creative technology, film, literature and publishing, music and performing arts, as well as visual arts and crafts.

⁴ <https://www.forbes.com/sites/billrosenblatt/2018/08/18/can-blockchains-disrupt-the-e-book-market-two-startups-will-find-out/?sh=4f17a2ba5a0b>

Literature and Publishing

- There is a need to improve the publishing value chain in Uganda which includes skilled workers/ professionals such as: commissioning editor, development editor, structural editor, copying editor and proofreader. All these aspects of the publishing process are what turns a manuscript into a good publishable product. Many books published on the continent do not win awards because they are poorly edited
- However, when the book is published, the next challenge is how to get the book to readers. Marketing of literary books is a key challenge in Uganda. There is need to create awareness to authors about the different income streams when it comes to book rights sales: e.g., Translation rights sale: a publisher or literary agent licenses a book for a specified period of time, in a specified language and territory (territory: what countries the publisher can sell the book into), to another publisher); rights for co-editions; audiobook rights, e-books and digital downloads; TV and film rights; and merchandising rights
- There need to design unique programmes that capture various aspects of the publishing process for self-publishers in Uganda. This is because in Uganda and Africa at large, the difference between the writer, the editor, the publisher, the bookseller is very thin, as self-publishing is the dominating publishing approach
- While Uganda lacks the publishing capacities, they are available in the UK. Africans in the diaspora who have worked in well-established publishing houses such as Allah Wakatama, the founding Publishing Director of The Indigo Press have transferred their skills through training workshops organized on the continent by organizations such as African Writers Trust. However, the costs bringing this expertise to the continent is costly and there is need to use the local expertise of those trained to support the self-publishing industry

Fashion

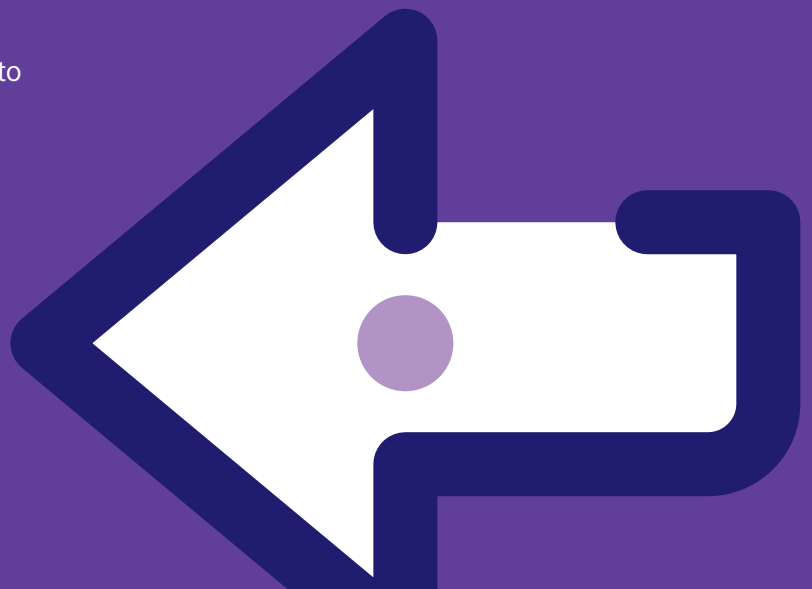
- There is need for a committed long-term funding so that there is continuity for capacity development of fashion designers
- There is need to connect fashion institutions offering fashion design capacity building in order for them to benchmark their programmes on what is happening the region e.g. British Council's Creative DNA programme
- There is need to reduce the import duty on fashion products in Uganda. For the Bold in Africa store, importation of designer pieces to the store is hampered due to the high import tariffs and the logistics costs
- There is need for standards and norms for high fashion in order for designers to exploit the international market

Creative Technology

- There is need for the government to reduce the cost of internet to enable wider access
- There is need to enable the creators to access quality tools and software e.g., through Tech hubs
- There is need for investment in technology infrastructure to support high level creative technology productions

Film

- There is need for more players in the capacity development space targeting filmmakers in cities outside Kampala



Music and Performance Arts

- There is need for contemporary music producers to tap into the diverse traditional sounds of Uganda to come with a sound that is uniquely Ugandan

Visual Arts and Crafts

- There is need to upgrade the visual arts education curriculum in Uganda, because what is being used is outdated and has limited space for conceptual art development, art history in general, and contemporary African art
- Need for more support for the national art gallery, including establishing more galleries with art collections that attract the public including school children
- There is need to promote geographic indication labels or community-based intellectual property for crafts made from barkcloth making, grass, beads or pottery that is unique to a particular community in Uganda

4.2 Current Investments towards Development and Support Initiatives of Creative Businesses

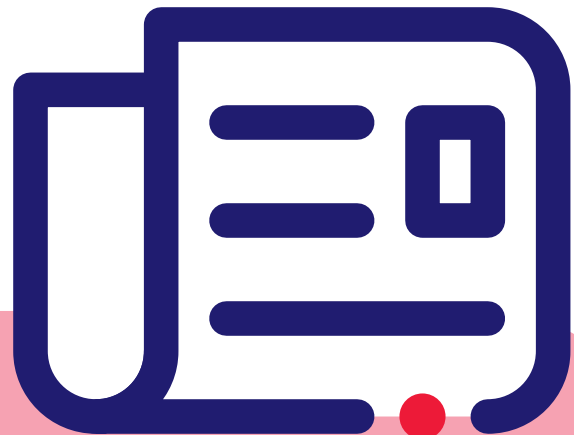
The government of Uganda does not have a dedicated fund to support the CCIs in the country. As a result, investment in creative space is by individual creative entrepreneurs, development partner support or private sector sponsorship. Kuonyesha Art Fund was launched in 2019 to address the needs of individual emerging artists. It is managed by CivFund with support from its partners Stichting DOEN and Robert Bosch Foundation.

The support of arts organizations in the last 10 years by development organizations has been through short-term to medium-terms grants. However, grant-making that does not trigger organizations to plan for sustainability through saving in trust units, fixed deposit accounts, endowment or investment funds. Instead, arts organizations spend a lot of their time writing reports against outputs for short-term projects, and for three-year projects, reporting against outcomes. As a result of the short life-span of projects, very few organizations can do impact studies of their organization as their projects depend on donor call for proposals, which change from time to time.

⁵ <https://youthblitz.com/creatures-animation-studio-to-produce-ugandas-first-disney-film/>

While grants on specific themes have a place in the CCI eco-system, especially for non-profits, it is important for CCI sector to have flexible funding for artists based on their ideas and not the ideas of the grant-maker.

Furthermore, the sector lacks startup financing to support Micro, Small and Medium Enterprises (MSMEs) and Small and Medium Enterprises (SMEs) in the CCI landscape. However, sectors that interface with technology such as TV series VR, AR and animation tend to attract critical financing. For example, Uganda's Creatures Animation Studio entered a deal with Disney⁵ to produce Uganda's first animated Disney film. Other sources of financing in the animation space have been through UCC, Agence Française de Développement (AFD) and DW Akademie among others.



Mastercard Foundation has however, joined the funding space by providing funding for the establishment of a maker space with innovative machinery and training programmes for creatives through MoTIV Africa. This kind of financing is game-changing in that will have an impact on a pool of creatives. It makes the case for the need for more impact investing into creative infrastructure projects, both in urban and rural settings that have a multiplier effect of providing jobs and employment for creative youth in Uganda.

There is a new MasterCard Strategic roadmap report on Youth Employment through the creative arts of which Bayimba, ITC, Steadman Global and

NextCom have been allocated \$10m for the next two and half years to invest in market connectivity, skilling and scaling . This kind of financing is strategic in that will have an impact on a pool of creatives. It makes the case for the need for more impact investing into creative infrastructure projects, both in urban and rural settings that have a multiplier effect of providing jobs and employment for creative youth in Uganda. However, infrastructure development should be supported by a robust capacity building programme.

4.3 Emerging and with Strong Implementation Capacity in the CCIs

This section highlights the sector players both emerging and with strong implementation capacity and could be potential partners in stimulating capacity in the selected sectors highlighted below.

Fashion

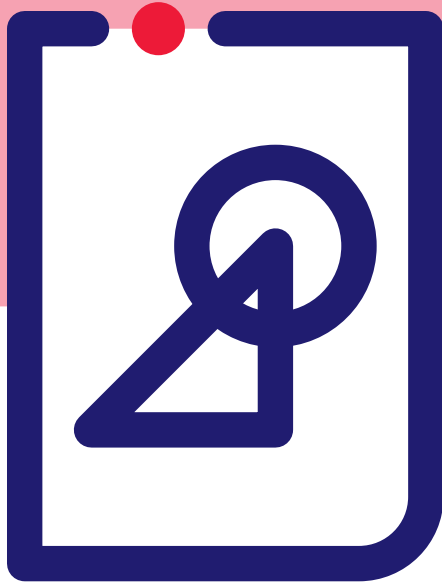
Artisan Global received grant from Fashion Impact Fund to support ten women to participate in a nine-month fashion and design course through their Artisan Center in Gulu City. The program aims to equip economically marginalized women with sewing, tailoring, design and business skills to pursue sustainable income opportunities and use fashion to ignite community change in Northern Uganda. The Artisan Center aims to be a viable participant in the fashion industry in Uganda and is positioned to be a driving force in the achievement of the Sustainable Development Goals and setting a new standard for the creative industries in the country by promoting inclusion of creative entrepreneurs who typically face many social and economic barriers. In Kampala,

Bold in Africa launched their Bold Women Fellowship in 2021 to create opportunities for African designers to retail their collections in spaces with excellent exposure and offer training in fashion retail and scaling production. In 2013, with support from Ignite Culture: ACP-EU Culture Programme (East Africa) is offering a fellowship for Ugandan women based in production in the fashion and home decor industry. The two organizations, have emerging implementation capacity in training. Bold in Africa also offers production space as well as retail. . Culture and Development's East Africa's Fashion Incubator that targets Tanzania and Uganda, has an e-learning fashion platform⁶ targeting fashion entrepreneurs.

Film

In the public sphere, the Ugandan Communications Commission (UCC) has demonstrated strong potential by providing training to over 5,000 content creators since 2014 in different skills such as:

⁶ <https://www.cdea.or.tz/fashion-elearning-portal/>



animation, sound, acting, lighting, cinematography, as well as contracting, there is need for more players in the capacity development space due to the breadth of the sector. UCC has been able to this using the digital space but also attracting technical support to the sector through its Content Development Support Programme.

In the private sector space, organizations such as Maisha Lab - training initiative for emerging East African filmmakers and Kampala Film Development Foundation - which offers film funding support through

crowd fundraising, film trainings, forums, exchange programs and community activations in 6 regions and territories across the country have strong implementation capacity. In the animation space the Crossroads Animation Academy offers internship training, 3D Computer animation and motion graphics training. Creatures Animation Studio also provides incubation opportunities for emerging animators in Uganda.

Literature and Publishing

In the literary space African Writers Trust (AWT) and the Ugandan Women Writers Association have made their mark in training creative writers. AWT has made an addition step of focusing of the editorial process of publishing with focus on self-published authors. On the other hand, a new entrant to the scene is Ibua Publishing focusing on promoting digital storytelling in Africa. There is a potential synergy between AWT and Ibua Publishing that both have a continental vision to collaborate in order to produce quality digital products.

Visual Arts and Crafts

In the visual arts space, 32° East| Uganda Arts Trust offers professional development for the visual artist using both local and international experts to facilitate both thematic and practical workshops to its members. The centre also offers trainings in graphics, photo and video editing. A key area that the centre feels is crucial for the development of the visual arts sector is curatorial practice. In addition, the centre has studios to host its residency for Ugandan artists. Currently, with support from the Ignite Culture grant, the centre is hosting artists from Uganda and East Africa.

For the crafts sector, the Ministry of Tourism has a training and capacity building programme for artisans through the Handicraft and Souvenir Development Programme (HSDP) that was launched in 2022 worth \$1.5m (Ugsh 5.6 bn).⁷ The government also aims to build modern production centres in every region of Uganda that can improve the skills of the artisans.

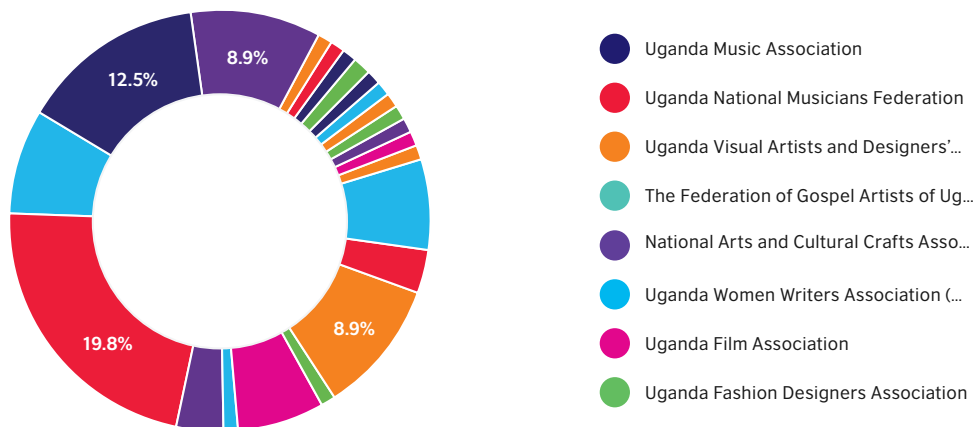
⁷ <https://www.monitor.co.ug/uganda/news/national/uganda-keen-to-make-the-most-of-her-crafts-4079516>

4.4 Growth Opportunities from CCI Clustering and Networks

In the survey conducted as part of this study, 79 respondents indicated the top five CCI networks in Uganda are:

- 1) Pearlwood-19.6%
- 2) Association of core film producers Uganda Limited -12.5%
- 3) Uganda Visual Arts and Designers Association -8.9%
- 4) Uganda Christian Writers Association --8.9%
- 5) National Union of Creative and Performing Arts Allied Workers (NACCAU)

Figure 3: CCI Clustering and Networks in Uganda



However, from 120 participants who were involved in the FGDs in the five cities in Uganda, the following issues emerged regarding clustering and networks:

Fashion

Fashion designers in the past used to belong to the Uganda Fashion Council but of late has not been engaging grassroots fashion designers. However, participants expressed the need for networks in order to have a collective voice to advocate for issues related to the fashion workers and designers. The FGD participants agreed that associations can also help influence policy and drive campaigns that push Buy Uganda Build Uganda ('BUBU') for the fashion industry in order for Ugandans to embrace their identity through what they wear.

Creative technology

The FGD participants in Kampala mentioned that they did not belong to any network.

Film

The FGD participants in Kampala belonged to informal associations (mostly WhatsApp groups). However, in Arua, FGD participants mentioned that they belonged to West Nile Film Makers Association and Nile Base Movies. In Gulu, FGD participants said they were members of the Northern Uganda Film Association connects all the production houses in the region

Music and Performing Arts

The FGD participants in Gulu mentioned that they belong associations with poor organizational capacities. They pointed out that they do not know the reason why the associations exist. This is because, after the formation, they do not come back to the artists to show the benefits. However, they took cognizance of the fact that it was important to have associations are members of federations that also members of the Ugandan National Cultural Forum (UNCF), which reports to the Uganda National Cultural Centre (UNCC), and then to the Ministry of Labour Social Development for policymaking before an issue goes parliament. In Arua, there are associations in place but largely dysfunctional. They include; Uganda Music Association – West Nile region, Giant Gobel Media, Lugbara soldiers, Arua Entertainers Association, Bushfire Music, Team Living Testimonies Music Label. However, the FGD participants in Kabale belong to an association of Amastiko Cultural Troupe that enables them to get gigs. In Mbale, the FGD participants were not aware of any associations.

Literature and Publishing

The FGD participants in Kampala mentioned that they belonged to FEMRITE -the Uganda Women Writers Association, Uganda Publishers Association and Uganda Children's Writers and Illustrators Association.

Visual Arts and Crafts

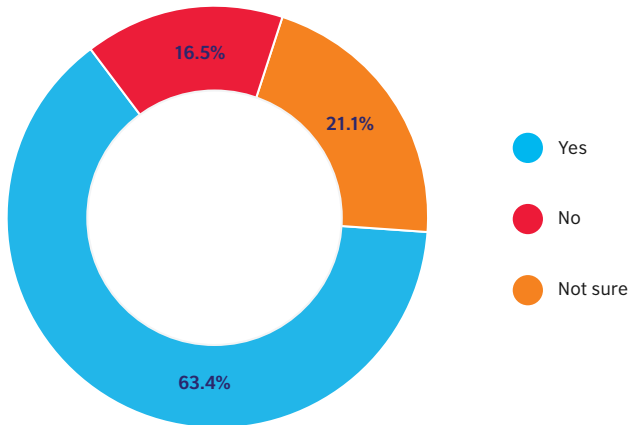
The FGD participants in Mbale mentioned that there are no association for visual arts and crafts. Small women groups exist such as Mbale Creative Arts Market as well as informal networks.

While the survey indicates that CCI practitioners belong to national networks, the findings from the FGDs show the weak links between associations in the regions and national level networks. In addition, there is clearly lack of clarity on the role of networks or associations in the regions. However, CCI operational groups like for traditional music and artisans seem to operate better as a business model.

4.5 CCI Innovation, Sustainability and Multi-disciplinary Practice

This section highlights innovation, sustainability and multi-disciplinary practice related to future-facing business and opportunities for Uganda's CCIs.

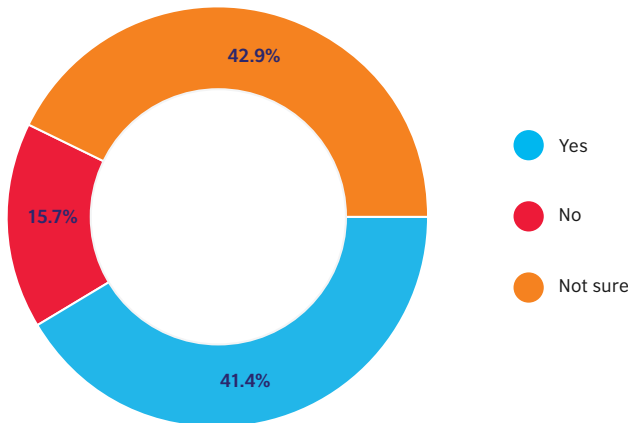
Figure 4: Do you consider the business models innovative and sustainable?



63.4% of the 79 respondents of the survey indicated they considered their business models innovative and sustainable, while 21.1% were not sure. 16.5% did not think their business models were innovative and sustainable. One respondent stated that as long as the artist is not empowered to negotiate for their product, these business models are not sustainable.

However, 42.9% of the 79 respondents of the survey indicated that there are best practice business models that have been tested and need to be scaled.

Figure 5: Best practice business models that have been tested and need to be scaled



Furthermore, 41.4% of the survey participants held the view that there are innovative business models that have been tested and need to be scaled that include:

Fashion

Online shops offer a solution to the limitation of market associated to a physical shop

Film

Online streaming on DSTV and Netflix provides an opportunity enable own home bred movies reach a wide audience e.g., The Girl in the Yellow Jumper

Literature and Publishing

Self-publishing is the solution for the lack of mainstream publishing houses interested in fiction. In addition, the licensing of the book other formats such as e-books and audio books, creates a wider market for creative writing.

Music and Performing Arts

The festival model provides platforms for emerging and established musicians to showcase their talent. In addition, local entertainment can be scaled if linked to a tourism calendar. The streaming of festivals offers an opportunity to wider audiences for performance artists.

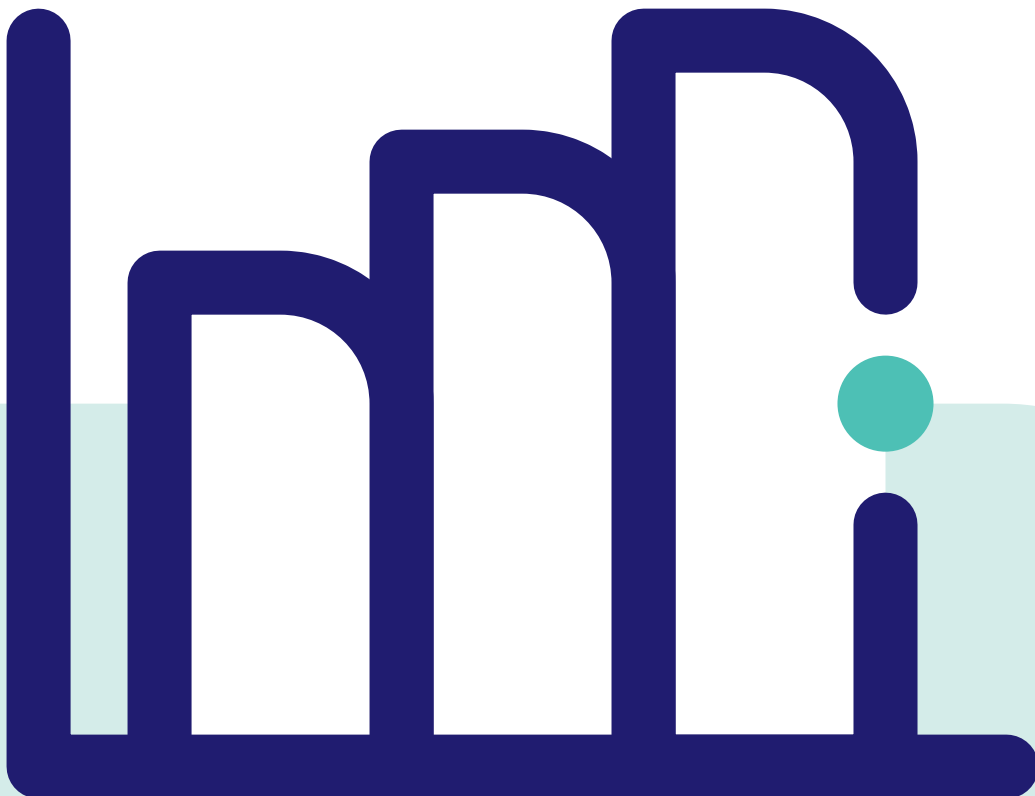
Visual arts and Crafts

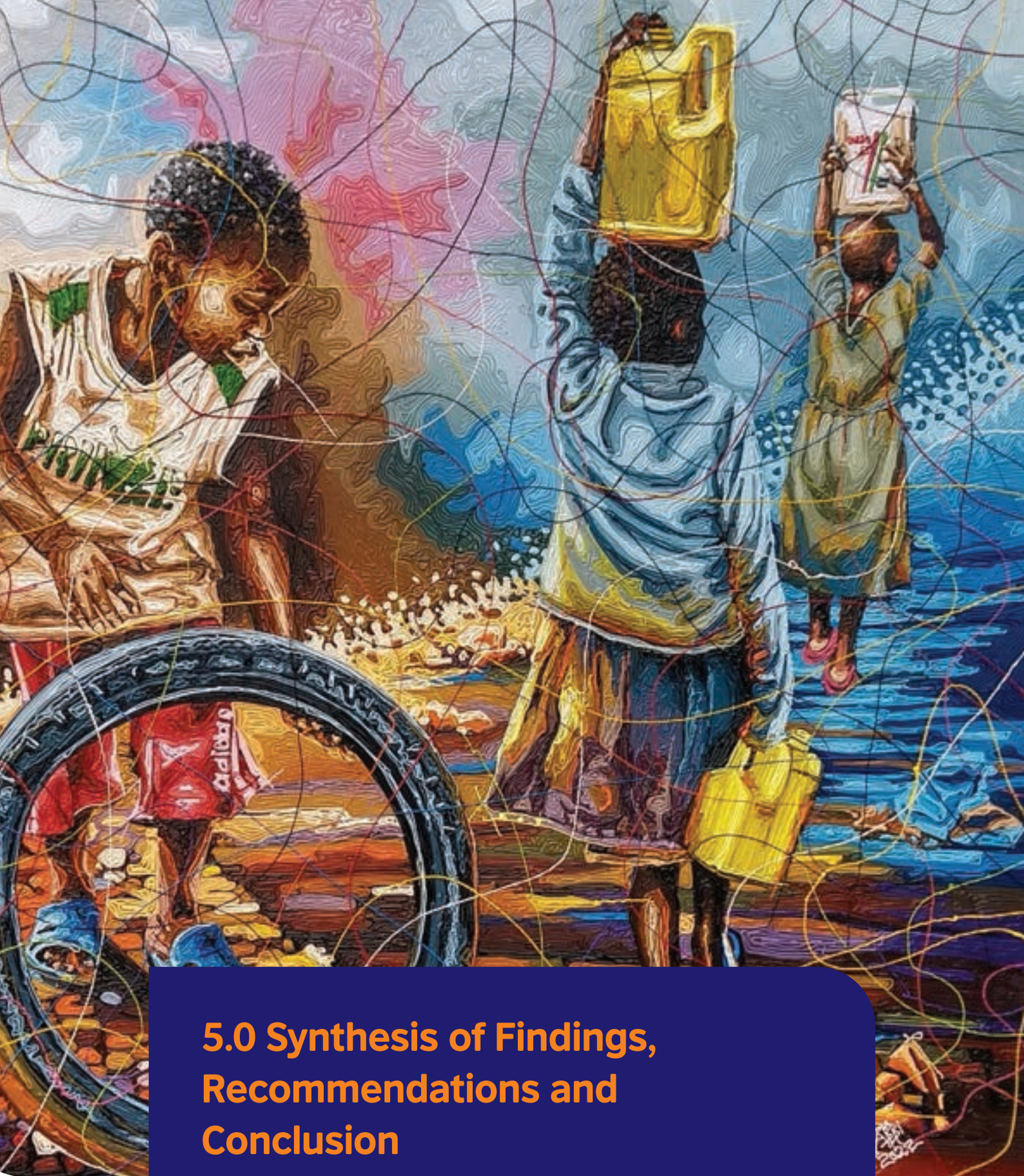
Having digital exhibitions as well as interfacing of digital art with blockchain technology offers opportunities of safeguarding the copyright of visual artists.

Fair trade in the crafts provides an opportunity for the crafts to exploit international markets, rather than being restricted to the tourist market.

Creative Technology

Web applications designs and commissions provide opportunity for multi-disciplinary practice related to fashion, film, literature and publishing, music and performing arts as well as visual arts and crafts.





5.0 Synthesis of Findings, Recommendations and Conclusion

Painting by Edward Ssajjabbi Kamugisha

This study concludes by providing a synthesis recommendations required to stimulate the growth and investment of the CCI, actions for high growth impact; actions for improving the CCI ecosystem and theory of change for collaborative sectors.

5.1 Key findings

Growth and Investment for the CCIs

- There is limited private sector investment directed towards creative businesses in Uganda due to lack of entrepreneurial skills. In addition, most creative businesses are micro due to lack of financing to scale. As a result, the donor-model has been dominant financing model for the selected sectors of this mapping study
- There are limited strategic collaborations or multi-disciplinary practices that could collate creative ideas and innovations to attract financing of large-scale projects that can create jobs for young people in Uganda
- There is also limited knowledge and lack of internal sector capacity that can lead to a paradigm shift for the CCIs, in order for them to attract global markets or private sector financing e.g., Fair trade for crafts, trade in rights for books and coproductions for film

Creative Enterprise Environment

- There are very few emerging or existing organizations with strong implementation capacity that can offer both creative/technical and business support training, incubation or acceleration of creative enterprises
- Informality characterizes the CCIs in Uganda, which contributes to the stunted growth of their enterprises
- For the music sector, there is a lack of a distinct sound coming out of Uganda that can position it on the African or global map

The CCI Ecosystem

- There are limited policy-related interventions supporting the CCIs in Uganda. The limited public support for the sector is skewed towards the film sector
- There is lack of holistic value chain capacity development, which leads to weak links in the sector value chains
- There limited working capital infrastructure to support the sector
- There is no basket fund for financing the sector from various development partners

5.2 Recommendations

5.2.1 Stimulate Growth and Investment for the CCIs in Uganda

Fashion

- SME support: There is need to provide business support to fashion businesses so that they can qualify to attract micro-financing as well commercial financing for their fashion brands

Creative Technology

- Tech hubs: Invest in tech hubs that work at the intersection of arts, science and technology

Film

- Production Consortiums: Producers should consider working in consortiums at national or regional level to raise co-productions financing of a minimum budget of USD 2 million. Such large productions can have a multiplier effect on creating jobs film sector and support sectors such as logistics and hospitality. In addition, evidence to work through consortiums can attract more financing interests.

Literature and Publishing

- Trade in rights: Have an African hub for African publishers that enables them to sell rights to established publishers from the West such as Penguin Random House
- Literary Prize: Working with corporate companies to support a well-established prize that can also enable a manuscript find a reputable publisher

Music and Performance Arts

- Venues: Investing in equipment and venues that accommodate various forms of entertainment e.g., amphitheatres, arenas

Visual Arts and Crafts

- Curating: Capacity building in curatorial practice that will attract a domestic market for the visual arts
- Fair trade: Branding community crafts under the fair-trade label

5.2.2 Target areas for high impact on creative enterprise environment

Fashion

- Provide business skills development education and financing for high fashion brands' business plans.

Creative Technology

- Artificial Intelligence tools can be used to assist artists and designers in image editing, and other non-creative tasks to improve efficiency.

Film

- Provide training to script writers, actors and directors, as well support crew, as well provision of production financing support

Literature and Publishing

- Professionalizing the self-publishing model by training the authors who have chosen to become publishers on the publishing process

Performing Arts

- Tapping into the musical and dance heritage of Uganda to identify a unique sound and rhythm that sell Uganda to the world e.g., The government of Tanzania has a project to promote Singeli as its national vibe.

Visual Arts and Crafts

- Introducing art auctions in the art market in Uganda; promoting crafts through geographic indication labels or community-based intellectual property. Protections like listing of the barkcloth, which is listed as a UNESCO Intangible Cultural Heritage and be used to attract private investments related to safeguarding the crafts.

5.2.3 The CCI ecosystem

The CCI ecosystem is vital for stimulating the development of the sector, and therefore the study proposes the following actions.

Policy And Regulatory Activation

Preferential Treatment For Cultural Products: Within the framework of the framework of the AfCFTA, African governments should adopt preferential treatment through reduction or removal of import tariffs for cultural products (literary books, fashion products, visual and performing arts) that would reduce the cost of exporting cultural products within the continent.

Enforcing Copyright Law: There need to be strict penalties for the pirating of copyrighted content especially in the digital space.

Local content: UCC should enforce the allocation of 70% local content by broadcasters in Uganda in order to promote the audio-visual content creation sector in Uganda

Co-production treaties: The government of Uganda should consider signing regional (EAC), continental or international coproduction treaties or agreements to facilitate collaborative fundraising for coproduction, marketing and exhibition of film across borders

Adopt a STEAM Curriculum: Rather than demotivate art teachers through policies that prioritizes better remuneration science teachers, the government of Uganda should adopt an approach that equips students with the skills and knowledge they need to be successful innovators in a 21st century workforce. There has been a growing emphasis on STEAM — the educational discipline that engages students around the subjects of Science, Technology, Engineering, the Arts and Math. STEAM is an educational discipline that aims to spark an interest and lifelong love of the arts and sciences in children from an early age. For example, the visual arts can be used in the teaching of the natural science, while the future scientists will need to develop their communication skills through artistic such as writing, illustrating, animating, videography, cartooning and model building.⁸

Mobility of Artists:

The government of Uganda should include in their bilateral agreements of other countries the ease of mobility of artists by remove hurdles such as bank statements as part of a visa application.

⁸ <https://onlinedegrees.sandiego.edu/steam-education-in-schools/#STEAM>

Urban Arts Policy: Kampala City Council and other cities in Uganda, should have an arts policy as well as establish a desk in the city council to deal with creative arts development

Regional and Continental Trade: There is need for the EAC member states to begin negotiations on the liberalization of trade in services for recreational, cultural and sporting services under the EAC and AfCFTA protocols on trade in services as they provide an opportunity for CCIs to broaden their markets.

Capacity Building

Skills and Education: There need to offer technical and business development for key value CCI chains in Uganda. This includes having public, private and NGO support in contributing to the skills gap.

Investment

Deep Investments: These deep investments focus on the essentials for value chain and market development and would include:

- Investing in human capital so as to produce:
 - 1) quality artists that are entrepreneurial and can make a sustainable living;
 - 2) quality arts managers that can develop and sustain organisations;
 - 3) quality arts service providers across the value chain(s) to support the creative industry.
- Investing in lasting (infra)structures so as to ensure:
 - 1) fully fledged and structured arts education institutions;
 - 2) adequate and affordable spaces, facilities and tools of the trade;
 - 3) access to local public and private financial support mechanisms (incl. emergency support mechanisms);
 - 4) access to affordable and revenue generating distribution channels. distribution channels

Access to Working Capital: CCI practitioners require flexible financing for their businesses and projects

Sponsorship: Support in CCI events and festivals

Impact Investment: impact investment would be most sustainable model for the CCI because it offers technical support and financing over a long-period of time.

Institutional Strengthening

Government bodies: There is need for government to strengthen the department of culture, in the Ministry of Gender, Labour and Social Development with a budget to support CCI support activities. A more strategic invention would be to establish a ministry specific for arts and culture.

NGOs: Civil society organizations providing support to the CCIs need long-term core support and project support to ensure continuity and impact of their interventions.

Incubators and Accelerators: The CCIs need a support mechanism for coaching, mentoring and advisory support for creative businesses.

Infrastructure

Public infrastructure: The government of Uganda needs to budget for infrastructure development like its East African counterparts e.g., Rwanda with a sports and arts areas and Tanzania that has plans to invest in two sports and arts areas.

Private infrastructure: The Uganda Investment Centre should consider profiling the key CCIs in Uganda for as investment priorities

Partnerships for Development

Development Partners: In alignment to SDG 17, the CCIs sector should not be left behind in the global agenda to address human capacity development and economic development

Public Private Partnerships (PPPs): The CCI sector will leapfrog to success if there is both public and private partnership investment in the sector

Civil Society: NGOs play a capacity development role as well as promoting thematic ideas within the CCIs e.g., human right perspective

5.2.4 The Next Steps for the Collaborative Sectors

- **The Creative technology** can be used to enhance efficiency for the value chains analysed in the study namely: **fashion, film, literature, performing arts and visual arts and crafts**
- **Heritage-based crafts** can be used in the production of quality accessories **for high fashion products** such as jewellery, leather goods and millinery, as well as the related processes, including embroidery, beading and button-making
- **The film industry** could spin off the success of **Ugandan literature** to produce feature films e.g.; Kintu by Jennifer Makumbi
- **The Visual arts** practitioners can design sets for the performance arts sector



5.3 Conclusion

In summation, this mapping study has demonstrated the current state of the CCIs in Uganda by highlighting the gaps and recommendations in terms of growth and investment for the CCIs, the creative enterprise environment and the CCI ecosystem. However, these recommendations are based on Uganda adopting a national theory of change whose proposed vision should be: **To adopt a holistic approach to develop the CCIs in Uganda that focuses on policy and regulatory activation, capacity building, investment and infrastructure,**

institutional strengthening, infrastructure and partnerships for development.

In addition, study highlights the need for paradigm shift from the cultural development approach to adopting the creative economy concept that focuses on transforming ideas into economic value by applying individual creativity, skill and talent. This calls for creative value chain and market development that can enhance entrepreneurship that would a multiplier effect for job opportunities and the exploitation of intellectual property for youth in Uganda.

6.0 Annexes: Data Collection Tools

ANNEX 1: FOCUS GROUP DISCUSSIONS Guide

Focus Group Protocol, Script, & Questions: Culture and Creative Sectors in Uganda

PROTOCOL

What you need:

10 selected participants

1 facilitator

Tape recorder/ Mobile Phone Recorder

Notebook and pen

Focus Group Discussion Questions

Safe Space for discussion: This should be an enclosed space with no distractions. Participants should be able to be comfortable for the entirety of the discussion.

SCRIPT

Welcome the participants and do a 1-minute energizer.

Have the participants sit in a circle.

Introduction:

“Welcome! My name is xxx representing Culture and Development East Africa (CDEA) a creative think tank based in Dar es Salaam, Tanzania. This Focus Group Discussion (FGD) is part of research to map the current Landscape of the Creative and Culture Industries (CCI) in Uganda that has been commissioned by a research team composed of: the British Council, Bayimba Cultural Foundation Cross Cultural Foundation Uganda, Kuonyesha Arts Fund, and Ministry of Gender, Labor and Social Development. There other FGDs taking place in other regions of Uganda to ensure that the outcome of this research is inclusive of the voices of the CCI practitioners. The aim of study is to establish the current post-COVID state and trends in CCIs as well as inform the British Council programming and investment strategies for improving the industry.

Explanation of Confidentiality:

“The discussion will take about 90 minutes or less. I am going to ask you some questions. Your answers will not be shared with anyone outside the research team. If you do not want to answer the question, you do not have to. If you do not feel comfortable or do not want to participate in the discussion at any time, you may leave the group. There are no right or wrong answers. However, we do ask that you answer honestly. You may answer the question in whatever way you understand the question. The discussion will also be recorded and I will be taking notes throughout the discussion. Input from the conversation will enable me to write the FGD report.

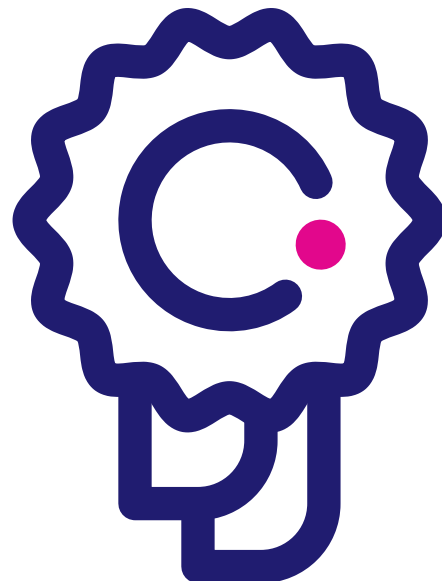
Thank you for agreeing to participate in this exercise”

Begin the discussion by letting them introduce themselves

Questions

1. Can you please describe the characteristics of your sector in terms of (a) nature of employment (b) working conditions (c) standards and norms (d) social protection, (e) gender equality
2. Do the creative practitioners/ businesses in your sector belong to a network or an association?
3. What type of occupations or jobs that are available in your sector along the creative value chain?
 - Creation
 - Production
 - Distribution
 - Exhibition
 - Consumption
4. Is there a minimum wage / minimum remuneration for the occupation you are in?
5. What do you consider to be the unique selling point in your sector?
6. What would you consider to be the challenges of your sector?
7. What opportunities exist for youth in your sector?
8. What threats exist for your sector?
9. How is digital or the use of technology integrated in your sector?
10. What lessons did you draw from the Covid-19 pandemic?
11. What safeguards need to be put in place to protect CCI businesses and practices from future pandemics?
12. What business models exist in your sector? Do you consider the business models innovative and sustainable?
13. Are there best practice business models that have been tested and need to be scaled?

Thank the participants for taking part in the FGD and close the discussion



ANNEX 2: In-depth interview guide with Capacity Building Organizations in in domain of arts and CCI Development

Name of interviewer:

Date:

Name of Interviewee:

Organization:

Role:

Gender:

1. Which area of the creative value is your capacity development programme located?
2. What capacity building support is organization is providing creative businesses?
3. What capacity need do you think has not been met?
4. What needs to be done in order address this gap?
5. Who are the emerging stakeholders in the CCI sector that have strong Implementation capacity and could become potential collaborators for your organization
6. Are there strategic actors who are not involved in the CCI space, but be pivotal in making a positive shift? If yes, mention and their comparative advantage
7. What kind of SME support is need to be able to stimulate the creative enterprise environment
8. What specific capacity need in these areas –(policy and regulation, training and education opportunities; investments, institutional and infrastructure development, if addressed would lead to high impact in the creative enterprise environment
9. What are the growth opportunities for your sector?
10. What market access opportunities exist for your sector?
11. Finally, can mention the key jobs or emerging occupations in the five moments of the creative value chain -

Creative moments	Key jobs/ emerging occupations
Creation	
Production	
Circulation/ Distribution	
Delivery	
Audience reception	

ANNEX 3: In-depth interview guide with donors active in domain of arts and CCI Development

Name of interviewer:

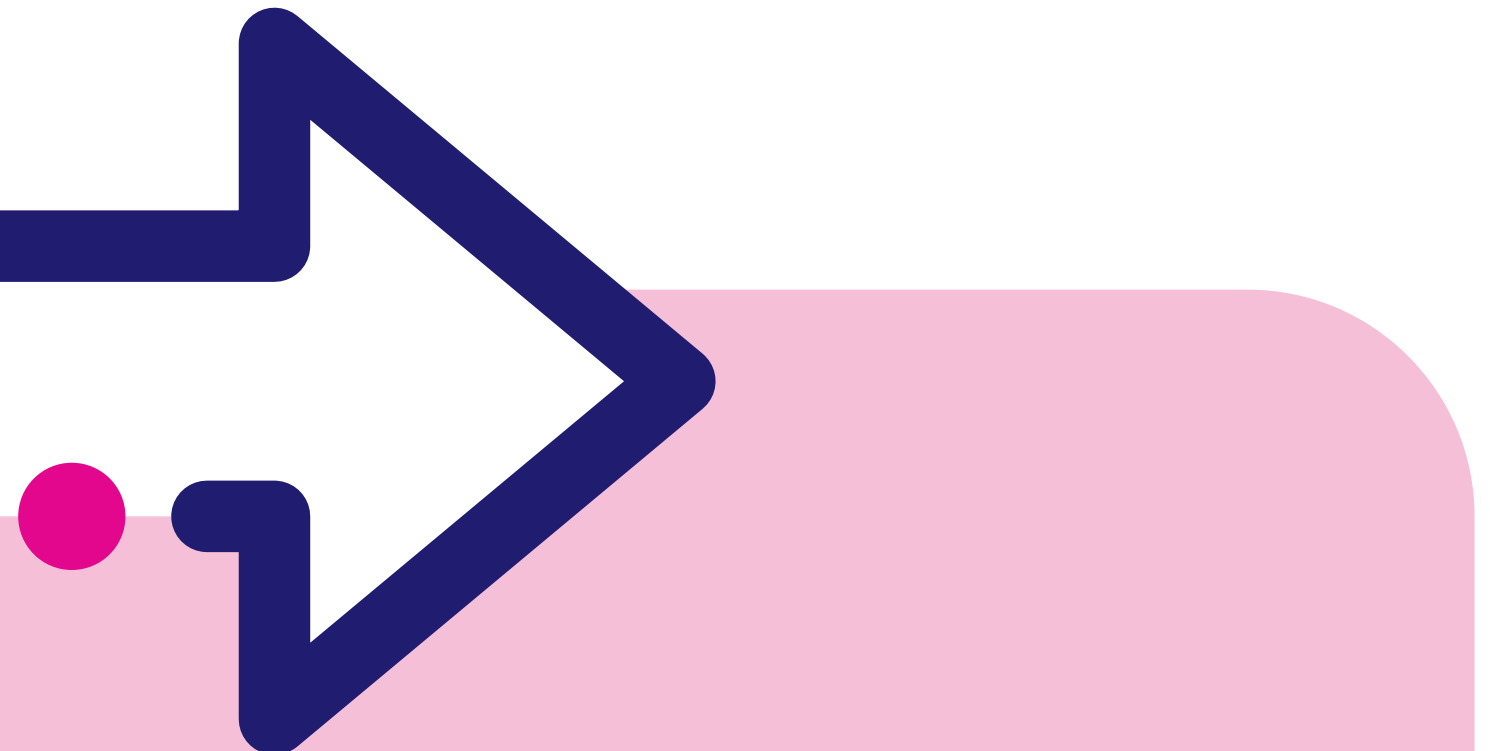
Date:

Name of the respondent:

Age:

Gender:

1. What is the focus of your country programme in Uganda and what do you consider the strength of in the area of supporting the arts or cultural and creative industries?
2. Who are key stakeholders in the CCI sector that your organization collaborates with?
3. Are there strategic actors who are not involved in the CCI space, but can be pivotal in making a positive shift? If yes, mention and their comparative advantage
4. What opportunities exist in your arts/CCI development strategy to promote synergies in cultural development in Uganda?
5. What hurdles exists for possible joint programming with other actors for your programme in Uganda?



ANNEX 4: SURVEY QUESTIONNAIRE

MAPPING THE CURRENT LANDSCAPE OF THE CULTURE AND CREATIVE INDUSTRIES IN UGANDA

The British Council, Bayimba Cultural Foundation, Cross Cultural Foundation Uganda, Kuonyesha Arts Fund, and Ministry of Gender, Labour and Social Development appointed Culture and Development East Africa (CDEA) to map the current landscape of the Culture and Creative Industries (CCIs) in Uganda. This study is expected to make an analysis of selected CCIs in Uganda, including specific post-COVID 19 shifts and digital-led opportunities.

The mapping report will be used to inform the current post-COVID state and trends in Uganda's CCIs as well as the British Council programming and investment strategies.

As a CCI practitioner, it is important that your views are taken into account in order to have interventions in the CCI ecosystem that are needs-based.

Please complete this survey before July 31, 2023.

For any clarification, please reach out to:

Ayeta Anne Wangusa, Executive Director, CDEA

ayeta.wangusa@cdea.or.tz

1. What cultural domain are you based in?

- Cultural and natural heritage
- Performance and celebration
- Visual arts and crafts
- Books and press
- Audio visual and interactive media
- Design and creative services
- Other:

2. What is your cultural or creative occupation/job?

Your answer

3. What is your gender?

- Male
- Female
- Not willing to disclose

4. Please select three characteristics that best describe your sector?

- Does not fit standard employment relationships
- Characterized by informality
- Is often characterised by lack of standards and norms
- Has micro enterprises and insecure forms of employment
- Precarity and uncertainty



- Lack of routine data collection by government
- Inadequate social protection coverage
- Poor working conditions
- Inadequate respect of labour laws
- gender inequality

5. What is your experience working in the cultural and creative sector?

Your answer

5. Do you belong to a cultural or creative network, federation or association in Uganda?

Yes

No

Other:

6. If yes, please check the name of your association or federation?

- Uganda Music Association
- Uganda National Musicians Federation
- Uganda Visual Artists and Designers' Association (UVADA)
- The Federation of Gospel Artists of Uganda
- National Arts and Cultural Crafts Association of Uganda (NACCAU)
- Uganda Women Writers Association (FEMRITE)
- Uganda Film Association
- Uganda Fashion Designers Association
- Other:

If other, please mention below

Your answer

7. What capacity challenges exist with networking within your sector?

Your answer

8. Can you describe the nature of your job in your sector?

Part-time and on-call -Not Full-time

Multiparty Employment Relationship -Subcontracted labour

Self-employment -Not part of the employment relationship

Fully employed

9. Is there a minimum wage / minimum remuneration for the cultural or creative occupation?

Yes

No

10. If yes, what is the minimum wage / minimum remuneration

Your answer

11. What do you consider to be the unique selling point of your cultural or creative occupation/job?

Your answer

12. What would you consider to be the challenges of your cultural or creative occupation/job?

Your answer

13. What growth opportunities exist for your cultural or creative occupation/job?

Your answer

14. What threats exists for your cultural or creative occupation/job?

Your answer

15. How is digital or the use of technology integrated in your cultural or creative occupation/job?

Your answer

16. What lessons did you draw from the Covid-19 pandemic?

Your answer

17. What safeguards need to be put in place to protect your cultural or creative occupations/jobs from future pandemics?

Your answer

18. What business models exist in your sector?

Your answer

19. Do you consider the business models innovative and sustainable?

Yes

No

Not sure

20. If No, please explain why

Your answer

21. Are there best practice business models that have been tested and need to be scaled?

Yes

No

Not sure

22. Is yes, please give examples

Your answer

23. What are the key barriers that limit the right for artists to enjoy their Intellectual Property Rights/Copyright?

Your answer

24. What action is required from the government in ensuring artists enjoy their Intellectual Property/ Copyright?

Your answer

25. Please add any suggestion on how to improve the current creative and cultural landscape in Uganda

Your answer



