



Voices of Creatives

Scenarios for the New Normal in the Creative Industries of Sub-Saharan Africa and the Middle East after Covid-19

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On behalf of German Federal Ministry for Economic Cooperation and Development
(BMZ)

Bonn, 2021

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EXECUTIVE SUMMARY

VOICES OF CREATIVES:

Scenarios for the New Normal in the Creative Industries of
Sub-Saharan Africa and the Middle East after Covid-19



7 cities in **6** countries researched



16 weeks research duration



1038 stakeholders from the sectors
Music, Fashion, and Design contacted

FACTS ABOUT THIS PROJECT



7 maps of the creative sectors'
spatial distribution



42 hours of focus group interviews
with **133** participants



604 completed surveys
(response rate: 58,1%)

Voices of Creatives

In 2018 the German Federal Ministry for Economic Cooperation and Development (BMZ) launched the *Global Project Cultural and Creative Industries*. The project is implemented by Goethe-Institut and GIZ and helps to improve the employment and income opportunities for and with those working in the cultural and creative industries (CCI) in six partner countries - Lebanon, Jordan, Iraq, Kenya, Senegal, and South Africa - by promoting entrepreneurial, digital, creative and technical skills through training programs. In addition, the project strengthens the creative ecosystem and the framework conditions of the CCI.

This report, Voices of Creatives, was initiated by the Global Project Cultural and Creative Industries. It is created from research conducted with stakeholders from the Music, Fashion, and Design sectors in the six focus countries. The research lasted from January to April 2021 and involved 23 team members in 12 countries, on 4 continents. The project team researched 7 cities: Beirut, Amman, Sulaymaniyah, Nairobi, Dakar, Cape Town, and Johannesburg, conducting 604 surveys and 42 hours of focus group interviews with 133 participants.

Voices of Creatives was created by consultant VibeLab, an Amsterdam, Berlin and Sydney-based consultancy built and operated by creatives. VibeLab is known for empowering creative communities in cities across the world by using data and engagement to turn the values and needs of creatives into public priorities. The study was commissioned by GIZ on behalf of the German Federal Ministry for Economy Cooperation and Development and was supported by Goethe-Institut.

What The Report Contains

The report contains six in-depth country profiles, where specific data and strategic analyses help present the voiced concerns and hopes of stakeholders on the ground. Enhancing this comprehensive analysis, full results of the Voices of Creatives' 30 survey questions - for each city and industry - are openly available as a web-only appendix to this report at: <https://voicesofcreativesdata.nighttime.org>.

The country profiles are followed by extensive recommendations for Covid-19 response actions organized around the themes of Space, Community, Training and Funding. Both chapters give attention to non-Western expertise on the cultural and creative industries' needs as well as their stakeholders' aspirations for development and, thus, broaden the perspectives for more effective and holistic problem solving.

Voices of Creatives closes with a chapter showcasing global case studies of current Covid-19 response actions, drawing from VibeLab's complementary project, the *Global Nighttime Recovery Plan*. These case studies illustrate multiple paths forward, and provide tangible examples of how our recommendations may look in action.



EXECUTIVE SUMMARY

The CCI have been dramatically affected by the Covid-19 pandemic. The ongoing nature of the pandemic in 2021, and the uncertainties around when a “New Normal” will emerge, have only made the need to address many structures and modi operandi in the CCI more pressing. The disruption caused by Covid-19 gives a real chance for a reset: addressing old inequalities to create constructive change in the CCI as a whole and ground-up future creative developments.

Key Conclusions:

- Covid-19 and other shocks of 2020 - such as the devastating explosion in Beirut, racing inflation across Lebanon, or heavy political unrest in Iraq — have created an existential crisis for CCI. Financial losses were extreme. Quality of life and employment dropped significantly.
- Music, across all countries investigated, was the sector most severely impacted by the pandemic.
- The importance of digital technology in CCI has accelerated. There is high demand for access to affordable internet service, software and hardware, and a need for training in digital technologies and business practices.
- Physical spaces for cultural production were badly impacted and remain at risk. They are vital to the future of CCI, despite the emergence of digital markets and spaces.
- Small businesses and freelancers need access to funding, training, and foreign markets, but also need legitimacy and acceptance in their home communities.
- While flexible forms of aid can be of great advantage under the current, volatile circumstances, there is a deep yearning for stability, longer-term visions and committed collaboration.
- International community-building and cooperation is hindered by current travel restrictions and — for some countries — longer lasting, structural obstacles to international trade, postage and digital payment that need to be addressed.
- The needs of CCI professionals vary across industries and by country, but many of the values, experiences, and priorities of creative individuals are universal.

INTRODUCTION

INTRODUCTION



Global Project Cultural and Creative Industries

The German Federal Ministry for Economic Cooperation and Development (BMZ) launched in 2018 the **Global Project Cultural and Creative Industries** to support professionals of the cultural and creative industries (CCI) in six partner countries with regard to improving creative ecosystems, employment and income prospects. The project is focused on Iraq, Jordan, Kenya, Lebanon, Senegal and South Africa. Its activities are implemented on site by the Goethe-Institut and GIZ. They address diverse stakeholders ranging from individual freelancers and business owners to organizations and platform events. The most targeted sectors are Music, Fashion, Design, and Animation/VR. **Voices of Creatives** is a study crowdsourced by creative communities from these six countries providing empirical evidence on the impact of Covid-19 on the CCI and formulating recommendations for suitable response actions. This research was designed by VibeLab, a consulting agency specialized in empowering creative communities in cities across the world by using data.

Cultural and creative industries professionals are the engineers of our imagination. Be it Senegalese music, fashion from Kenya, South African animation films or design from the Middle East — creatives work where art, culture, commerce, and technology meet. Their business is all about giving shape to materials, processes, or values, and making them proliferate in society. Thus, they naturally provide services to many other industries and contribute to cross-innovation and growth in the local economy. According to [numbers from UNCTAD](#) the CCI have become a global economic force on the rise, generating 2,250 billion USD annually and employing more than 30 million workers worldwide. They are one of the world's most dynamic and fastest-growing industries and offer new job and income opportunities, especially for young people in emerging and developing countries. Thus, they are a powerful driver for the promotion of sustainable and broad-based development. In fact, the United Nations declared 2021 the International Year of Creative Economy for Sustainable Development. They could not have chosen a more crucial moment in time.

Covid-19 pandemic

In the course of the Covid-19 pandemic, the CCI have been heavily affected by the measures to contain the virus. Contact restrictions, curfews, lockdowns, and travel bans confront them with existential challenges, especially where social interaction is an essential part of their service or product.

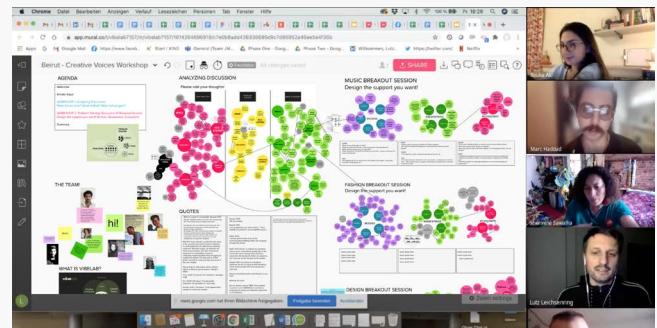
In view of the unclear projection on the duration of the pandemic, the question arises how realistic prospects of returning to conditions similar to those in 2019 are or whether a "New Normal" arises that requires businesses to undertake bold adaptations. In either case, we must ask what these industries, which have been so vulnerable to this current crisis, can do differently to become more resilient.

To develop effective responses to the unprecedented consequences of Covid-19 on cultural and creative industries, first, we needed to grasp these consequences — not intuitively, but on the basis of precise data.

Voices of Creatives

Voices of Creatives is a community-sourced research project which provides, for most of the partner countries, the most advanced data about the impact of Covid-19 on the cultural and creative industries so far available. VibeLab collaborated with more than 600 creatives who contributed information

to this united effort. The investigation was focused on three sectors — Music, Fashion, and Design (including also Animation/VR).



Voice of Creatives Beirut online focus group II, Feb 26th 2021.

The samples of this study do not represent the entire creative workforce of the six partner countries at large. On the one hand, we had to reduce in width what we wanted to gain in qualitative depth. On the other, due to travel restrictions this research had to be set up remotely with a team spread over 16 cities, 12 countries, and 4 continents. Thus, we chose to concentrate on major creative hubs in selected cities of the 6 partner countries where greater numbers of participants could be reached out to more easily.

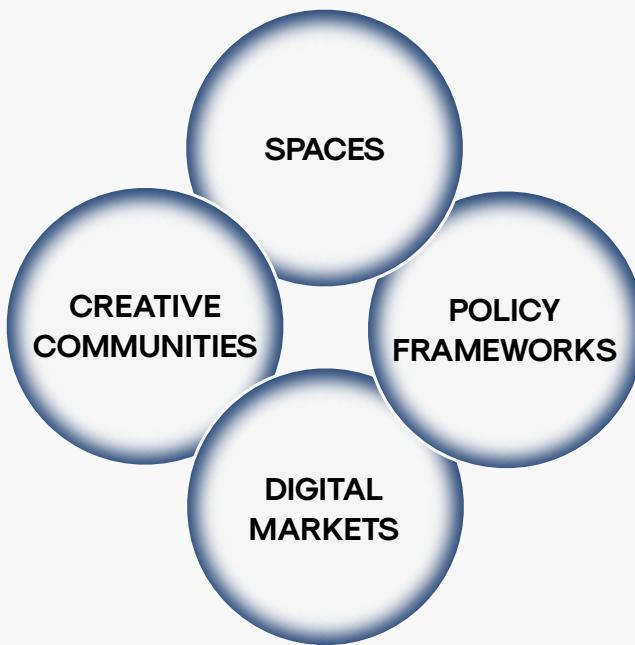
Our results therefore reflect mainly the realities in those high density, creative conglomerates — as these are, after all, the places where creative people, spaces and activities most frequently center. It is worth noting, nevertheless, that creative communities in other cities and rural areas might live and work in even more precarious conditions than those which our numbers reveal and that interventions designed for their benefit are of particular value.

With this being said, Voices of Creatives has compiled a scope of data that will greatly advance the quality of decision-making within the targeted sectors, creating a foundation of scientific evidence. The results encompass detailed knowledge about the economic, social and spatial realities of the CCI and the impact of the pandemic. They also outline scenarios of the New Normal as voiced one hundredfold by local stakeholders and lists their recommendations on how to advance employability, income generation, and creative ecosystems under these new conditions.

RESEARCH DESIGN

Voices of Creatives set out to collect and connect various sets of data, most of which had never been available before in the form of objective evidence to institutions or the communities on site.

Step 1: Research and Preliminary Analysis



We went through open source statistics and laid out parallel country profiles with demographic and macro-economic indicator data. These let us examine our survey results in terms relative to local conditions. We constructed a set of baseline conditions to allow for us to assess the impact of the pandemic and other recent economic disruptions.

Our CCI-focused research was foundational to our approach and informed our survey design. This research was focused on several core areas which allowed us to build our research tools around the drivers for CCI sector development:

1. *Creative people and communities:* Education and skills development drive innovation and economic development. The general welfare of the creative community is important to the achievement of equitable growth, decent work, and empowerment of women and young people.
2. *Creative spaces:* The location and spatial distribution of creative industries is an important driver of their potential success. Clusters create agglomeration economies and efficiencies in the creative economy. The quality and affordability of housing and work spaces is important to the success of CCI businesses.

3. *Policy frameworks:* The institutional environment has an effect on CCIs through collaboration, social acceptance, funding, and engagement.

4. *Digital markets:* Digital tools and markets are increasingly important to the successful operation of CCIs, but the penetration of such technologies is uneven.

Step 2: Stakeholder Databases

We recruited local scene members in the 7 cities through pre-existing contact networks of VibeLab and the Goethe-Institut. These local coordinators compiled databases of creative professionals in the sectors Music, Fashion, and Design.

Step 3: Online Survey

Four weeks into the project and with our foundational research done, we started building an online survey. Here, we faced the challenge of formulating questions that would be suitable to the realities of web coders in Dakar, embroidery designers in Sulaymaniyah, and club managers in Beirut. The final survey consisted of approximately 30 questions, most of them multiple choice in order to lower the threshold and time needed to complete the survey and to increase comparability of outcomes between different cities. These questions were designed to understand the baseline conditions of work in the CCIs and measure the economic, social, and emotional impacts of the pandemic on the lives of creative people. We attempted to create a landscape of creative clusters prior to the pandemic. We also tried to understand the factors important to the success of different types of creative professionals, and determine the relationships between education and demographic background on the needs of our subjects. As a result we can now present the quantitative contours of creative business and some evidence of the effect of Covid-19 as well as other shocks of the year 2020.

All questions went through extensive feedback processes with our local coordinators to assure their accessibility to all stakeholders, and were later made available in English, French, and Arabic. All participants from Sulaymaniyah, Iraq, were personally guided through the survey by our local coordinator who offered translation to Kurdish when needed.

Our survey sample of 604 is non-random and therefore should not be considered a scientifically accurate depiction

of the entire industries from which it samples. Subjects were presented with the survey through social networks and personal outreach — so their participation has some selection bias. However, the diversity of the participants in the survey sample is clear relative to the indicators we collected, and through the information the subjects provided. Thus, the surveys can be assessed at face value.

We also asked questions related to mappable elements of local geography as they related to the lived experience of our subjects. In cities where mental landscapes of the environment often use interchangeable names and landmarks — this produced a geographic scan of pre-Covid-19 conditions which is usually difficult to access.

Our analysis was carried out using custom software built using statistics, geographic information systems, and graphics packages by VibeLab team members at the University of Pennsylvania.

Full results of the survey's 30 questions, cross-tabulated by city and industry, are a web-only appendix to this report, and are available at the following site: <https://voicesofcreativedata.nighttime.org>

Step 4: Online Focus Groups

We invited approximately 20 professionals per country from the music, fashion, and design sectors for 2 consecutive rounds of focus group interviews in each country, compiling a total of 42 hours of recorded conversation. While our initial plan was to hold the interviews on site, due to travel restrictions we finally decided on a remote and fully digital workshop format. Besides the already habitual use of a video conferencing app, we opened the space with a short concert by a local musician, and incorporated a digital whiteboard that all participants were able to open on their devices and interact with, adding their comments on digital post-its, clustering topics, and drawing connections. In the background, a team of up to 6 co-moderators and note-takers helped to guide and document the interviews. Overall, each of the 12 focus group sessions had a length of 2 - 2 ½ hours.

Participants were able to see preliminary results from our survey and feedback our findings. In workshop 1 we dived into a wide-angle discussion with a mixed-sector set of about 10 participants. We wanted to get a first understanding of the impact of Covid-19 with the help of three questions:

What was lost? What shifted? and What was gained? These questions indicated to us aspects of a local CCI ecosystem where resilience was greater (shifts, gains) or lesser (losses).

In workshop 2, we presented core take-outs from this debate to a new set of participants and went into sector-specific small groups to discuss a cluster of more in-depth questions: creative professionals' access to various resources, local business environments, most needed adaptations, success factors, and their city's ecosystem for the sector, including spaces, organizations, and social community. Overall, while wanting to make a mental inventory of the difficulties that creative industries professionals face, we looked out especially for strategies, initiatives, and people and spaces that have shown resilience to those difficulties and might give important cues on how to navigate in the New Normal.

Step 5: Mapping

We plotted geographic maps of the CCI landscape based on data from our survey and the focus group interviews. These maps highlight the dispersion of creative industries sectors across different districts as well as a handful of important landmarks relevant to the CCI ecosystem. Data were drawn from open source geographic libraries, and also generated by hand when such data did not exist. Based on our set of hypotheses that physical creative spaces a) are and will remain crucial for vibrant, creative ecosystems and b) have been most vulnerable to lockdown measures, c) strategic interventions to aid the CCIs will probably have to include considerations about physical creative spaces, and take such aspects into account.

Step 6: Analysis

We used our research framework as a tool to look for CCI strengths, weaknesses, opportunities, and threats (SWOT analysis) in each city. We compared baseline indicators from each country profile with data analysis from the focus group and survey. The value of this framework is to guide our understanding of the impact of the pandemic on CCIs, and for proposing recommendations that leverage existing strengths to address weaknesses, which highlight the need to cluster recommendations across four areas: Space, Community, Training, and Funding. In doing so, the framework ensures that no major drivers of development are overlooked. Whilst this report deploys this particular analytical framework, it is a tool that could be deployed in other cities for the formulation of CCI development strategies.

COUNTRY PROFILES

As with so many things in life, the impetus to help professionals from the culture and creative industries to “improve creative ecosystems, employment and income prospects” is reliant on how those professionals interact and work with each other on the ground. This report, therefore, should not give birth to a predominantly top-down strategy or way of thinking. Nor one that demands too many preconditions. Those on the ground need to drive demands according to real needs, and shape outcomes.

The process of shaping successful outcomes and maintaining initial growth, or consolidating potential cannot be seen as one with a fixed endpoint, either. The CCI are, by necessity and inclination, industries that rely on waste, liminal spaces and often marginalized bodies, and indeterminate thought processes; ones that change from place to place, according to need, fashion, or societal pressures. From throwaway ideas in one place come new possibilities in another. A phrase such as digital co-working, for example, can mean many things in each country. That is why it is vital to foreground these voices, found in these 6 country / city profiles, and give them the power to shape their own futures.



LEBANON | BEIRUT



JORDAN | AMMAN



IRAQ | SULAYMANIYAH



KENYA | NAIROBI



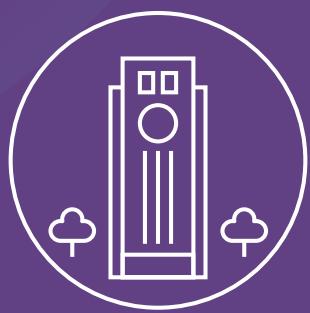
SENEGAL | DAKAR



SOUTH AFRICA | CAPE TOWN



SOUTH AFRICA | JOHANNESBURG



LEBANON | BEIRUT

Beirut could easily call itself the survivor's city. Still adjusting to a political revolution, a currency crisis, the Covid-19 pandemic and the devastating blast on the waterfront in August 2020, Beirut's socio-economic situation is best described as fragile. An added factor is the large refugee population, and an ongoing difficulty in ensuring regular supplies of basic services such as water supply and sanitation. Cumulatively these factors have led to Beirut being classified as one of the hardest hit cities in the world. In particular the music scene has been decimated, as the blast on the waterfront was adjacent to Mar Mikhael, the city's "creative heart" and destroyed many event spaces. Nothing is certain in Beirut, but maintaining the traditionally internationalist outlook of its inhabitants has become the city's fallback over the last 12 months.

The challenges facing our respondents were stark: though a number of creatives did receive some aid, unemployment or underemployment in 2020 was up almost 1000% compared to pre-Covid-19. Consequently a large proportion of the respondents showed little optimism for their future prospects. Many have upped sticks and left. However—despite, or maybe because the currency has recently lost 85% of its value—demand for international currencies was high, rents are cheap and the country, with an intelligent, committed and connected workforce can be seen as a good place to invest.

In contrast to the other cities, many of the respondents were more concerned about the currency crisis and how to pick up the pieces after the blast than the invisible menace presented by the pandemic. A no-nonsense approach, born of looking at daily reality in the face, marks many of the respondents' answers. Respondent Ralph Nasr: "We need a way to pitch services that are offered by Lebanese professionals to potential clients in Europe or elsewhere—be it branding, design, media, management for artists, consultancy, even call centers. All the services that we can provide remotely. Or we could build an online platform where Lebanese creatives could put up their portfolio and foreign clients could find them easily or post job offers. Secondly, bringing the production to Lebanon would make so much sense. And [...] when the events come back to Beirut, we need support with materials, like used equipment, sound systems. If there's a way to send that over from Europe we could recycle it. Because we won't afford to buy new equipment, that's for sure."

KEY FINDINGS

- Beirut is an important hub for the region's creative economy and is home to a wide range of creative industries, spaces and communities.
- The currency crisis, pandemic and the August 2020 blast have intensified the fragile political and business environment, resulting in severe impacts to the economy, which is also one of the hardest hit globally.
- The currency crisis is directly affecting Beirut's creative economy, its actors and their ability to navigate the pandemic.
- Instability and devalued currency negatively impact investments and access to technologies needed for the production of goods and services.
- Under these circumstances, the creative community relies on the strength of its growing internal social support and its strong international links to survive.
- The landscape of Beirut's creative spaces is changing, partially because of the 2020 blast.
- The level of uncertainty among the sample is the highest across all cities surveyed.



"If things were Covid-related only, you know, it would have made things easier. But we have to add to it those two additional layers of the currency devaluation and the explosion. I think that's why people are not seeing the light at the end of the tunnel."

— **Ronald Hajjar**, Creative agency founder and consultant

FACT SHEET:

Overview

- Beirut is the capital of Lebanon, historically one of the most affluent countries in the Middle East and home to 6.82 m people.¹ There are 2.40 m people estimated as living in Beirut.
- Lebanon is one of the most densely populated countries in the Middle East, with 520 people per km², hosting 30% of Syrian refugees and 90% of Palestinian refugees.² More than one-fourth of the total population is aged 14 years and younger.³
- While data for school enrolment is not available from official sources, access to education for refugees remains a challenge. Secondary education is highly privatized.⁴

Economy

- Lebanon is an Upper Middle Income country with a Gross National Income per capita of \$15,900.⁵
- The Lebanese economy is currently undergoing a currency crisis with rapid depreciation of the lira, making imports expensive. Imports represent 47% of the GDP. The economy increasingly relies on the \$6.9b in remittances received from the international diaspora.⁶
- 6.6% of the total labor force and 14.48% of the labor force with advanced education is unemployed. The International Labour Organisation estimates that 37.47% of total workers are self-employed, more men (44.4%) than women (15.0%).
- Data using national poverty lines highlights that in 2010, the last year for which data is available, 27.4% of the total population lives in poverty.⁷ Lebanon is also among the most unequal countries in the region, where the bottom 40% owns as little as 7% of the national income⁸, one indicator to measure the UN Sustainable Development Goal 10.⁹

Business Environment

- Lebanon has an unequal provision of services. Access to water, sanitation and hygiene infrastructure remains a challenge, especially for the large refugee population.
- Lebanon ranks poorly in the World Bank Ease of Doing Business Report, scoring below the regional average for starting a business and with an overall rank of 141 out 190 countries.¹⁰
- The pandemic is also exacerbating Lebanon's currency and debt crises. Private consumption has plummeted and Lebanon's economy is one of the hardest hit globally, shrinking 21% in 2020.¹¹
- 78.2% of the total population has internet access.¹² 44.8% of people aged 15+ have an account at a financial institution or with a mobile-money-service provider.¹³
- While the population's access to electricity in urban areas is at 100%, blackouts are frequent.¹⁴

Creative Industries¹⁵

- Lebanon's largest creative industry and export sector is the Design sector. Jewelry, Lebanon's historical and competitive sub-sector, was worth \$59m in 2014, followed by interior design (\$54m) and fashion accessories (\$9m). The second most significant export sector is Publishing, where books accounted for \$112m. The third-largest share of exports is the Art and Crafts sector. Lebanon's Fashion sector is also recognized as an important regional hub.
- Overall, Lebanon's creative economy Balance of Trade is negative (\$ -211.75 m), as imports are nearly double the exports. The top 3 trading export partners are Saudi Arabia, the United Arab Emirates, and Iraq, while the top 3 trading import partners are France, Turkey and United Arab Emirates. Creative services are also increasingly important for the local economy, especially for "Personal, cultural and recreational services", where Audiovisual and related services accounted for \$290.2m.

¹. UN Population Division's World Urbanization Prospects, 2020.

². UN-Habitat, 2018.

³. UNESCO Institute for Statistics, 2019.

⁴. World Bank, 2018.

⁵. GNI per capita, PPP (current international \$); World Bank, 2019.

⁶. World Bank, 2018.

⁷. CAS and World Bank, 2015.

⁸. World Inequality Database, 2019.

⁹. "By 2030, progressively achieve and sustain income growth of the

bottom 40 percent of the population at a rate higher than the national average".

¹⁰. World Bank Ease of Doing Business Report, 2019.

¹¹. World Bank, 2021.

¹². International Telecommunication Union World Telecommunication, 2019.

¹³. World Bank Global Financial Inclusion Database, 2017.

¹⁴. World Bank, 2018.

¹⁵. UNCTAD, 2014.

DATA ANALYSIS

The Creative Community

- The Beirut survey sample was the largest in the study, with 114 responses. More men (58%) than women (42%) were surveyed. A majority of the subjects were aged between 25 and 34 years old.
- A very high proportion of the sample is university educated (over 63%) and another 28% has a degree from a graduate school.
- Music and Design are the dominant industries in the sample, followed by fashion. In terms of the types of jobs for each industry, there is a higher proportion of people working in Sales in Fashion and deejaying in Music compared to other cities. There was some overlap between those working in the music and design fields (Figure 1).
- More than 50% of people in our sample are self-employed. A significant proportion is represented by business owners, followed by creative people currently unemployed and people working for a firm with more than 10 workers.
- Business registration is low (54%) compared to other cities, indicating that the creative sector in Beirut may not be easily formalized for the high costs associated with starting a business.
- In line with other cities, nearly 40% of creative people are self-taught, and less than one third learn the skills needed for their work in school. This may indicate a mismatch between the skills required by the creative economy in Beirut and the local education offer of graduate schools and universities.



"I started working in floral design because I love working with my hands, being in front of the people, cutting the flowers, and I'm finding myself right now trying to understand Instagram in front of a computer. Being a virtual florist with virtual flowers is... well, not exactly what I had in mind as my mission. But I guess it's the only way forward."

— Soraya Hatem, Florist

Industry (Total n)	Music (56)	Design (57)	Fashion (27)
Top job roles (n)	Deejaying (34)	Graphic Design (25)	Design (22)
	Music Production & Recording (33)	Product Design (21)	Production & Manufacturing (20)
	Event Production (27)	Management (20)	Sales (15)

Figure 1. Top three job roles in the creative industries

The Impact of the Pandemic on the Creative Economy

- Full time employment in creative sectors dropped by more than 2/3rds, and unemployment or underemployment was up almost 1000% (Figure 2). Self-employed and freelancers are 45% percent of the sample, 57% report an earnings drop of over 75% in 2020. Only 2% report earning the same or more income.
- Beirut is also an outlier looking at the type of subsidies received by the creative community. 46% of subjects reported receiving some kind of aid. Direct cash assistance was the most common form of support (26%) — significantly higher than mutual aid and family support (14%). A small number also reported receiving food aid during 2020.
- Most business owners (69%) have seen their income reduced below 50% of 2019 levels. However, a small but significant proportion (10%) saw income growing in 2020.
- For those 11% who reported being unemployed, there was a split between those who became unemployed around the beginning of Covid lockdowns (12 months) and around the time of the port explosion (6 months).
- The level of optimism in the city is low compared to other cities — 41% report that they “don’t know” whether they are optimistic about their careers. This is potentially linked to the volatile political and socio-economic context.



“Any piece of fashion we sell outside of Lebanon, at this moment, is worth ten pieces we sell here. Going abroad to fairs in Cairo, or Jeddah, or Dubai means so much right now. But participation fees are very high and without a guaranteed return on investment, I sometimes just cannot take the risk.”

— Eric Mathieu Ritter, Fashion designer

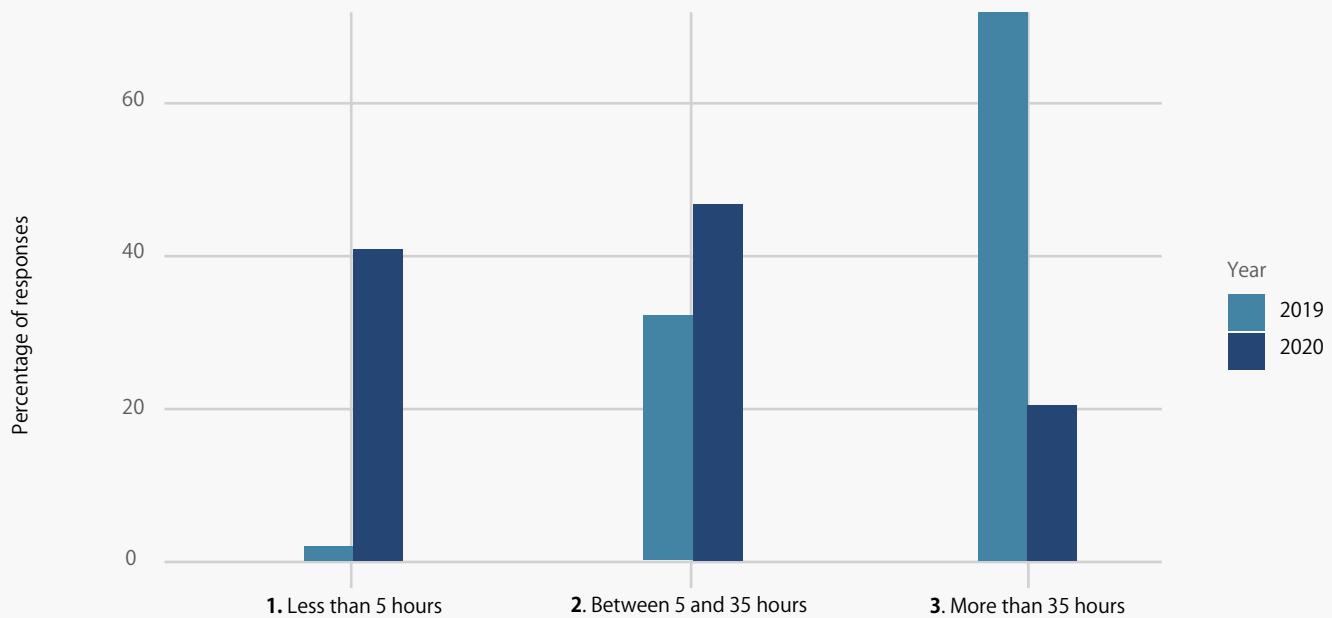


Figure 2. Hours per week in creative employment, 2019-2020, Beirut. n=114

CREATIVE SPACES

- Although there was creative work taking place all across Beirut prior to the pandemic and the port explosion, the most significant clusters are in the city's northeastern quarters. These areas, such as Mar Mikhael, seemed to be the quick answer for most survey participants who were asked to identify the city's "Creative Heart." Unfortunately, these sections are very close to the site of the port explosion (Figure 3).
- Live performance-related trades were prominent in Beirut's survey group. Venue closures had a significant impact on the creative community. Fewer than 40% of creatives in Beirut were able to maintain productivity levels by relocating to safe environments during the pandemic.



"Lebanon is mainly a country of services — we do not produce a lot. So any product that we consume in the country, we'll have to import it from abroad. In terms of nightlife, let's say, everything is imported. The drinks are imported, the equipment is imported, decor and material to rebuild the clubs is imported, international deejays — imported. All those costs have gone dramatically up. If today they said: Ok, clubs can re-open — we don't know how to price it."

— Georges Chahine, Booker and artist care manager

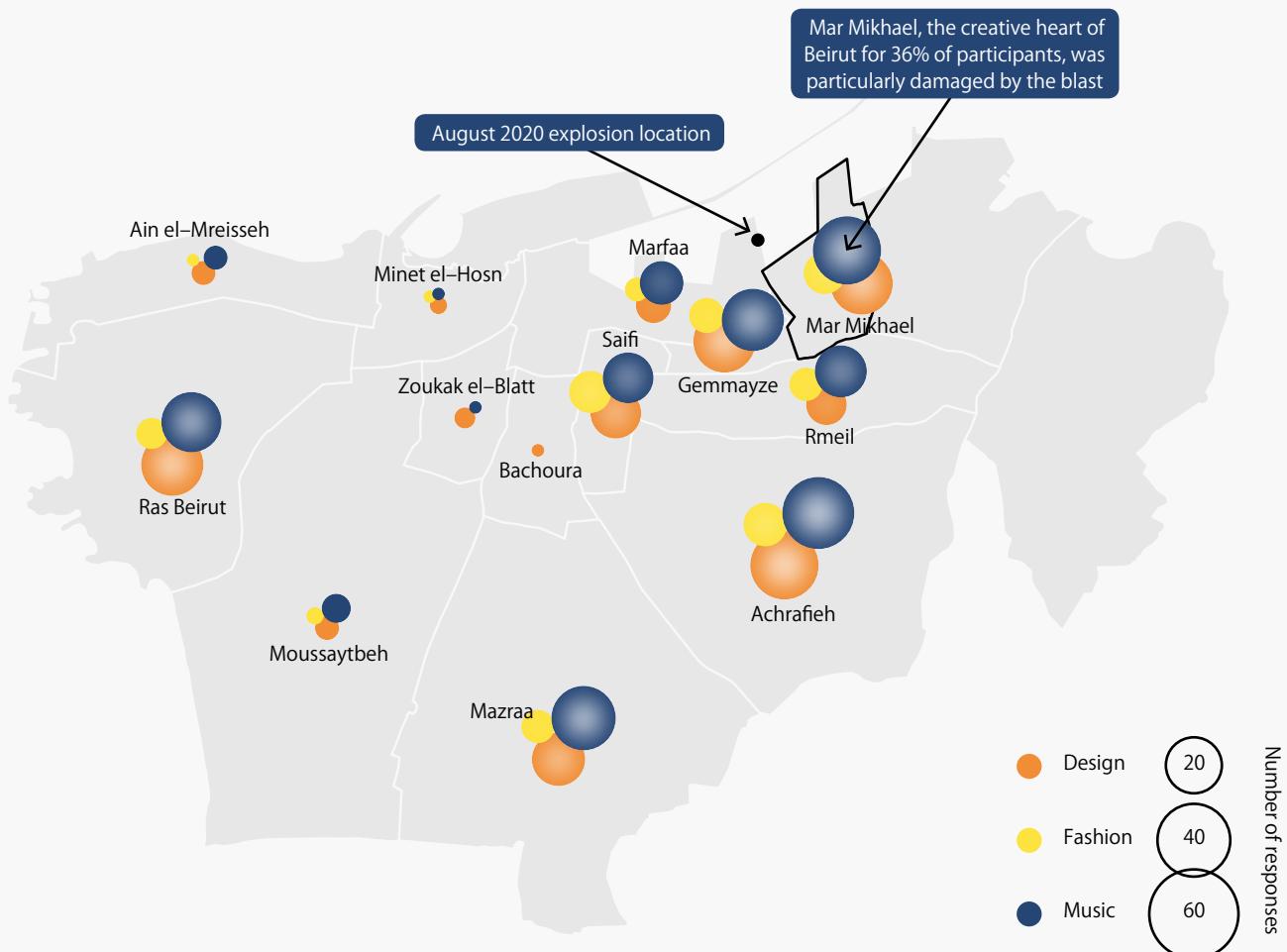


Figure 3. The CCI map of Beirut.

DRIVERS FOR DEVELOPMENT

Success Factors

- Beirut is the only city where access to foreign currencies and markets is a top priority among the creative industries surveyed. This is linked to the devaluation of the currency and is aggravating the affordability of imported technologies.
- Available and affordable internet connection, access to affordable technology and access to foreign currencies and markets are the top 3 success factors in Beirut, followed by physical security, and available and affordable public utilities (Figure 4).
- The country's under-supply of electricity needs also to be taken into account when considering priority needs in terms of available and affordable public utilities and internet connection.
- Finally, Beirut's creative community reports that their perceived access to local officials is the worst across cities of the sample surveyed, further highlighting the need to strengthen the link between political and economic institutions.



"Now the positive thing about remote working is that any company in the world could include a Lebanese person. We speak three languages—English, Arabic, and French. There's a lot of cultural diversity and we're exposed to different ways of looking at things. So we easily fit in in different environments. And the world already has a year of experience with this now."

— **Ronald Hajjar**, Creative agency founder and consultant

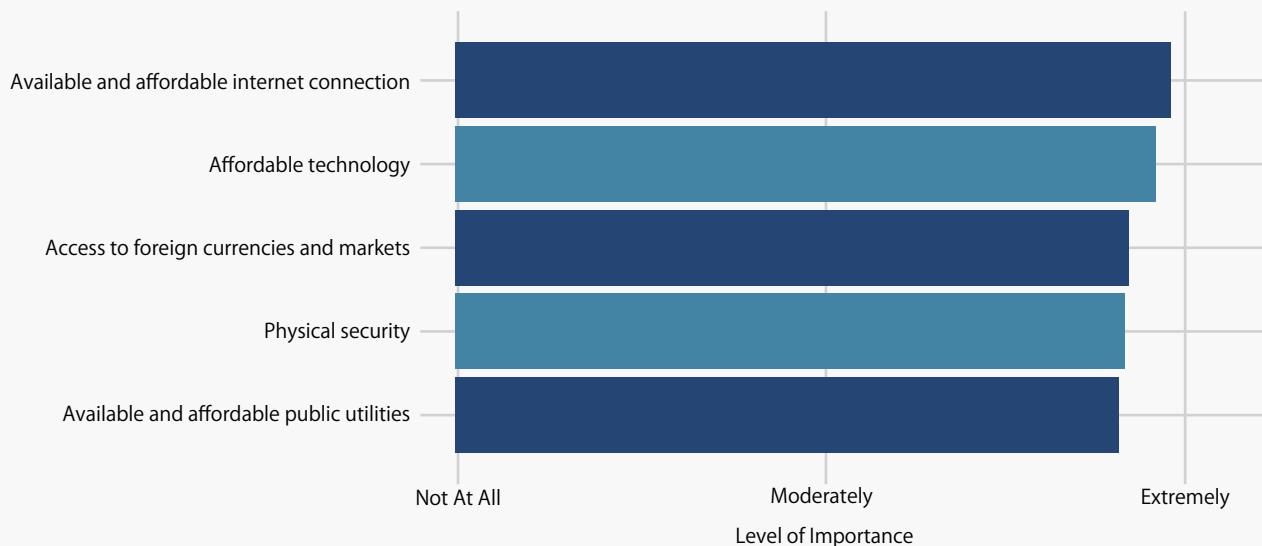


Figure 4. Top 5 responses to "How important are these goods, services and concepts to the success of your work?" n=114.

Strengths

- Lebanese CCI enjoy a high international reputation and are internationally networked.
- Lebanese diaspora communities are historically important to international connections.
- Rents are relatively low and CCI professionals mostly have been able to sustain centrally located living and working spaces despite heavy income cuts (except for those spaces damaged or destroyed by the explosion).
- The sense of solidarity and willingness to support others among the CCI community allowed creatives to adapt to new conditions.
- Professional skills are reported to meet local demands and training opportunities do not seem a top priority.

Weaknesses

- The Lebanese currency has lost 85% to its former value since August 2019. Imported goods paid with Lebanese money are today nine times more expensive than in 2019.
- Mobility costs to meet new clients abroad have multiplied.
- Creative spaces close to the site of the explosion were damaged or destroyed. Their reconstruction cannot be resolved with the currency crisis.
- Potential to access foreign markets is variable for different professions.
- The political and economical instability in Lebanon hinders foreign investment and access to finance.
- The country suffers under frequent power cuts.
- Our interviewees described Lebanon as a "site of disconnected micro-bubbles" with very few connections between different social pods of creatives. This mirrors a lack of formalized, inclusive networks.
- Under the given political conditions, there is no basis for dialogue between CCI professionals with state actors.

SWOT ANALYSIS**Opportunities**

- The devalued Lebanese currency has made Lebanon relatively cheap for foreign clients and investors.
- The normalization of remote work and eCommerce is creating favorable conditions for Lebanese freelancers and small businesses to target foreign customers.
- Current conditions make strategies attractive that favor local production cycles and recycling of materials, therefore reducing import dependency.
- Lebanon will be a relatively cheap destination for tourism over the next few years.
- The series of devastating crises and subsequent media coverage has brought global attention, awareness and solidarity to Lebanon. This may synergize with trending efforts in the corporate sector to make businesses serve the purposes of diversity, anti-racism and global justice.
- Local artists will have more access to gigs as formerly competing international acts will be unaffordable while the currency is in crisis.

Threats

- Local producers are not able to maintain their standard of living by producing for the collapsed local market alone.
- Lebanon is affected by a significant brain drain.
- Lack of finance is threatening to cause a lag of investment in new technologies.
- Participants reported serious mental health challenges and a sense of disintegrating community.
- Lebanon experiences increasing frictions and segregation between social groups, especially outside the "bubble" of creatives.
- Political instability and social unrest may strangle the potential for recovery, including foreign investment and tourism.



© Karl Sfeir 2020

AHM, one of Beirut's most famous nightclubs after the explosion on 04. August 2020. Frequented by thousands on a weekly basis, the venue was closed at the time of the blast due to Covid-19.



"In Lebanon, we don't have unions, syndicates, or organized artist movements in any sector. I think if we look to other countries, these unions are often the real problem-solvers. When we, in contrast, want to gather people for a united project, it takes a lot of time and effort to contact all the individuals and bring them together. I think this crisis is an opportunity to convince people to finally unite. And we surely could need some help to know how to set it up and some funds to get it started."

— **Ziad Moukarzel**, Sound expert, music producer, and DJ



"I was questioning all my life's choices with all this instability. It was like an illusion, a bubble that exploded, and it's really heavy, mentally, to have to think about this and for such an endless time. Each of us followed his or her passion. We decided to take on that challenge, knowing the consequences. But especially in Lebanon, with all the instability that affects all professional sectors, ours got hit the hardest."

— **Ralph Nasr**, Arts and electronic music curator



JORDAN | AMMAN

It could be argued that Amman, the capital of Jordan, can look around and count its blessings. Our data showed that the pandemic's impact was the least severe across all case studies. Amman can also point to an established and successful design industry, growing fashion and new media industries, and an international music scene with strong links to its peers in Ramallah, Haifa, and Beirut. Yet the work with our partners and local respondents painted a more complex picture of a city and a restless, capricious creative workforce on the cusp of change. The pandemic had also brought into relief certain structural, financial and socio-cultural practices and assumptions in the creative industries that, in a time of crisis, were increasingly seen as hidebound and restrictive.

The city itself can't be viewed as a homogenous entity. For one, it is home to a large diaspora of Palestinian residents, whose presence plays a significant part in an energetic local music scene which often plays out in restaurants, bars or small spaces, for want of established venue space. One of the respondents, Shermine Sawalha, painted the city as a disparate and sometimes liminal one, where many highly educated and quick thinking young creatives were looking to avoid established creative structures, as well as break into the new space accelerated by Covid-19; the digital one. "West-Amman and East-Amman have a large economic disparity. Jabal Amman and Jabal Al-Weibdeh, which are in between of both sides, and the mix of those societies together. And that's where our generation feels the most comfortable because we're sick and tired of feeling like we belong to this or that. We want to collaborate no matter where we come from, we want to create, we want to be."

This restlessness, informality and liminality does allow creatives to be flexible in the ever changing pandemic situation. Respondent Dana Dajani: "We just use our room as a workspace and don't have to worry about rent until the situation gets more favorable again." But this approach masks, or even absolves an under-developed events sector with few adequate spaces, lax professionalism and a lack of business skills, and low rates of business formalization. Amman's creatives could use the highly influential *Amman Design Week* as an agent for change and consolidation in terms of reestablishing relations with more conservative older creative groups and upskilling in terms of formalizing individual enterprises. At time of writing, the Design Week is considered under threat.

KEY FINDINGS

- The survey sample is highly educated and gender balanced with high participation from the design sector.
- The impact of the pandemic on Amman's sample was the least severe across all case studies.
- The design sector seems to generate positive input and labor market externalities between contemporary music and fashion sectors, via productive collaborations and co-production.
- Traditional design sectors such as Crafts are important for the employability of women and as the "makers" behind many designers. However, this segment is not represented by the survey.
- Compared to cities where the national levels of informality are higher in relation to their respective samples surveyed, the creative community in Amman is disproportionately operating informally.
- The low number of music venues in Amman and a greater agility of its actors may explain the relatively smaller impact of the pandemic compared to other cities. On the other hand, it mirrors an under-developed music (events) sector with an undersupply of adequate spaces for the vibrant artistic scene, lack of business skills, and lower rates of business formalization reported by the sample and focus group.



"Since Covid-19 hit, everything has shifted to digital. We do work a lot, but we work more for less. A lot of what we are working on now — building a social media presence and so on — does not translate into direct revenue."

— Rawan Rishiq, Singer/songwriter, performance artist, and facilitator

FACT SHEET:

Overview

- There are 4.2 m people living in the capital Amman¹—nearly half of Jordan's 10.2 m population.²
- Jordan is a highly urbanized country with an urban population of 82.6%.³ 19.4% are between the ages of 15 and 24.⁴
- School enrolment rates for primary and secondary are relatively high for the Middle East & North Africa Region, respectively at 81.8% and 65.2%.⁵

Economy

- According to the World Bank, Jordan is an Upper Middle Income country with a Gross National Income per capita of \$10,520.⁶
- The country has a youthful workforce but also high rates of unemployment, especially for women: 18.5% of the total labor force is unemployed. Unemployment for those with an advanced education such as a university degree is particularly high, at 24.6% of the total labor force.
- The percentage of self-employed people on the total employment is 13.92%.⁷
- 15.7% of the total population lives in poverty.⁸ Jordan is a very unequal country. The bottom 40% owns as little as 13.3% of the national income,⁹ one indicator to measure the UN Sustainable Development Goal 10.1.¹⁰

Business Environment

- Jordan is a country with a strong local business community and good infrastructures compared to its regional peers. Jordan ranks 75 out of 190 countries in the World Bank Ease of Doing Business Report, scoring above the regional average for starting a business.¹¹
- 66.8% of the total population has access to the internet.¹²
- Access to electricity in urban areas is at 100%.¹³
- The proportion of people aged 15+ with an account at a financial institution or with a mobile-money-service provider is 42.5%, a measure of financial inclusion.¹⁴

Creative Industries¹⁵

- Jordan's largest creative industry is Design, which accounts for 73% of total creative good exports in 2014 (\$230.7 million).
- Jordan exports design goods, jewelry, and interior design for an estimated value of \$168 million
- Other significant export sectors are Publishing and New Media, with Fashion also a sector with potentials for growth.
- Jordan's creative economy trade balance is negative (\$ -343.56 million). Imports are almost double the exports.
- The top 3 trading export partners are the United States, Saudi Arabia and Iraq, while the top 3 trading import partners are Italy, United Arab Emirates and, Saudi Arabia. Design dominates the import sector.

¹. DoS estimates based on 2015 census, 2017.

². UN Population Division's World Urbanization Prospects, 2020.

³. UN Habitat, 2012.

⁴. UN Population Division's World Urbanization Prospects, 2020.

⁵. UNESCO Institute for Statistics, 2019.

⁶. GNI per capita, PPP (current international \$); World Bank, 2019.

⁷. World Bank modelled International Labour Organization estimate, 2019.

⁸. World Bank, 2018.

⁹. World Inequality Database, 2019.

¹⁰. "By 2030, progressively achieve and sustain income growth of the bottom 40 percent of the population at a rate higher than the national average".

¹¹. World Bank Ease of Doing Business Report, 2019.

¹². International Telecommunication Union World Telecommunication, 2019.

¹³. World Bank, 2018.

¹⁴. World Bank Global Financial Inclusion Database, 2017.

¹⁵. UNCTAD, 2014.

DATA ANALYSIS

The Creative Community in Amman

- The 91-person Amman survey sample was unique amongst the cities in the study in that it was generally balanced between males and females. A slight majority of the subjects were female, with a plurality of subjects aged between 25 and 34.
- Design is the dominant industry in our sample, followed by Music and Fashion (Figure 1).
- The majority of people in our sample are self-employed, freelancers, or business owners. Business registration in our sample is lower than expected (33% operate informally and 11% preferred not to say) given levels of business formalization in Jordan. This may indicate, as suggested in the focus group, that the creative industries operate more informally than other industries in Jordan.
- The survey sample is extremely highly educated — with 97% possessing a university degree. However, less than one third of creative people said they learned the relevant professional skills needed for their work in formal schooling.
- Focus group responses suggest that university training in many creative fields is not of high quality and still not socially accepted, with creatives often graduating in other subjects such as architecture and engineering before moving into the arts.



"The most important support I need at this stage is guidance. Guidance on how to adapt to this confusing situation. Guidance on how to set up my online presence and how to make an income under these conditions. Even just information and indicators of what's really going on in the industry. I've spent a year now trying to find out but, personally, I'm not sure what to do."

— Ayman Alsalhi, Architect and Musician

Industry (Total n)	Music (36)	Design (50)	Fashion (20)
Top job roles (n)	Music production and recording (23)	Graphic Design (19)	Design (20)
	Event production (16)	Interior Design (19)	Production and Manufacturing (12)
	Festivals (13)	Architecture and Urban Planning (17)	Textiles (11)

Figure 1. Top three job roles in the creative industries

The Impact of the Pandemic on the Creative Economy

- Relative to other cities, the sample in Amman has experienced the least severe economic impact, by a small margin. Perhaps this is due to the larger prominence of those in the design industries—and even music industries—with fewer fixed costs and the ability to work flexibly in home studios or online-dominated spaces. The baseline was strong — there were no subjects in the fashion or design industries who reported working less (part-time) than in 2019 in their chosen field.
- However, the majority of business owners in the survey sample reported shedding many employees in 2020 (Figure 2) and over half the survey sample reported a drop in standard of living from 2019-2020.
- While the outcomes were still severe, over 40% of the survey sample in Amman was able to work full time in creative employment in 2020, a relatively high level for our survey. However, the relative proportion of full-time and part-time creative workers fell as more workers moved into unemployment.
- Revenue and income earned in 2020 (as a percentage of that earned in 2019) was relatively lower for the Music industry than for Design and Fashion.

- The music community in Amman reported that practically no-one in the community owns a club space. Organizers seek out restaurants or other partially-suited venues to host events. Thus, income is only generated from ticketing (not the bar), making events a smaller source of revenue for the scene than in other survey cities. Amman's most populous music sub-group was the recording industry. The lack of venues forces event organizers to have a diverse set of income streams.



"I did all my work (as an event organizer) by taking over spaces and bringing in all the equipment from A to Z every single week to do the shows. We don't have many venues that are set up for event promoters and operating on a continuous basis."

— *Shermine Sawalha, Cultural manager and event producer*

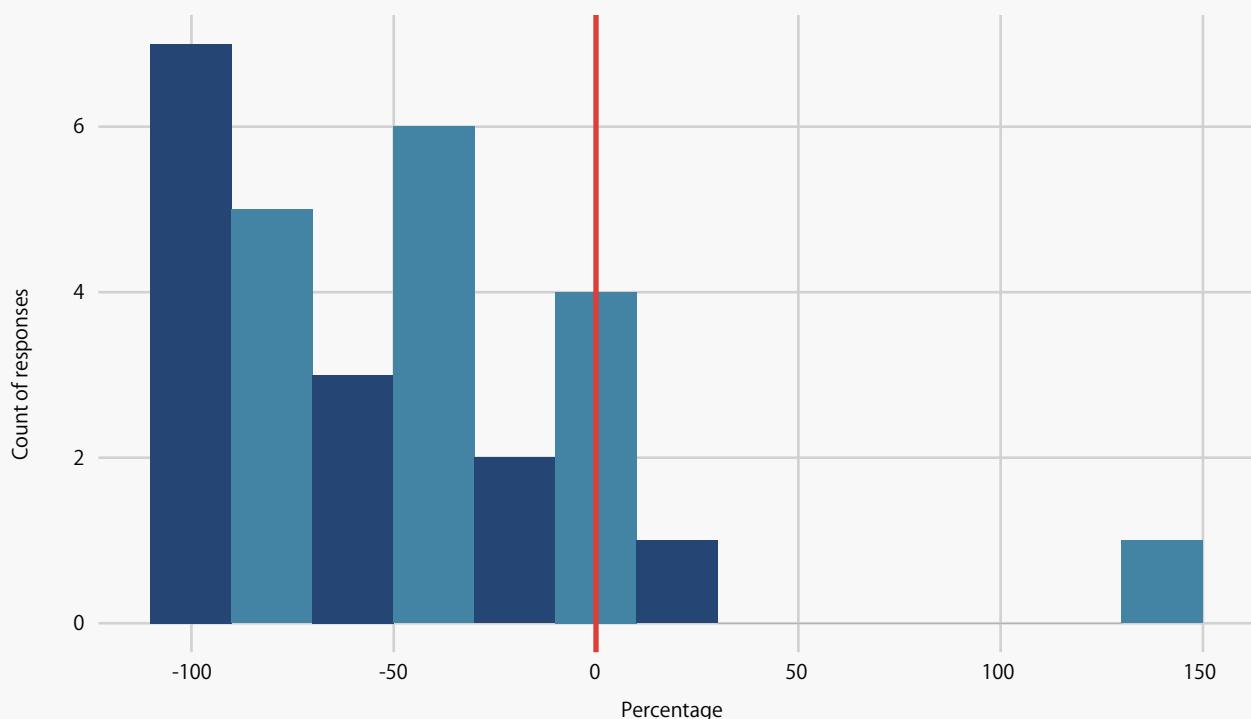


Figure 2. Number of employees reported by business owners in 2020 as a percentage of those they employed in 2019. N = 39.

CREATIVE SPACES

- Creative spaces for Design, Music and Fashion are clustered around Al-Weibdeh, which is a central area, home to the highest number of creative spaces in Amman. While the Design and Music sectors are dispersed across the city, three/four districts constitute the heart of Amman's creative spaces.¹⁶
- King Hussein Business Park is a compound located in the more affluent West-Amman (Khalda district), close to several well-reputed schools. It is home to a range of large companies with a focus on the ICT sector. While the Business Park misses cultural vibrancy, according to focus group participants, it is a place that especially designers interact with.
- Compared to other cities, more members of the creative community were able to move to appropriate Covid-19-safe spaces to maintain productivity (Figure 4). This data is in line with the finding that Amman has experienced the least severe economic impact of the cities surveyed and that workshop or studios constituted the most important creative spaces pre-pandemic.

¹⁶ Jabal Al-Weibdeh, Jabal Amman, Downtown, Khalda



“West-Amman and East-Amman have a large economic disparity. Jabal Amman and Jabal Al-Weibdeh, which are in between of both sides, and the mix of those societies together.”

— *Shermine Sawalha, Cultural manager and event producer*



“Amman has a very family-based society and a lot of us can rely on their parents. A lot of us actually continue living in their parents' home so if there's a time with little money coming in, we can bear things more easily.”

— *Dana Dajani, Writer and performer*

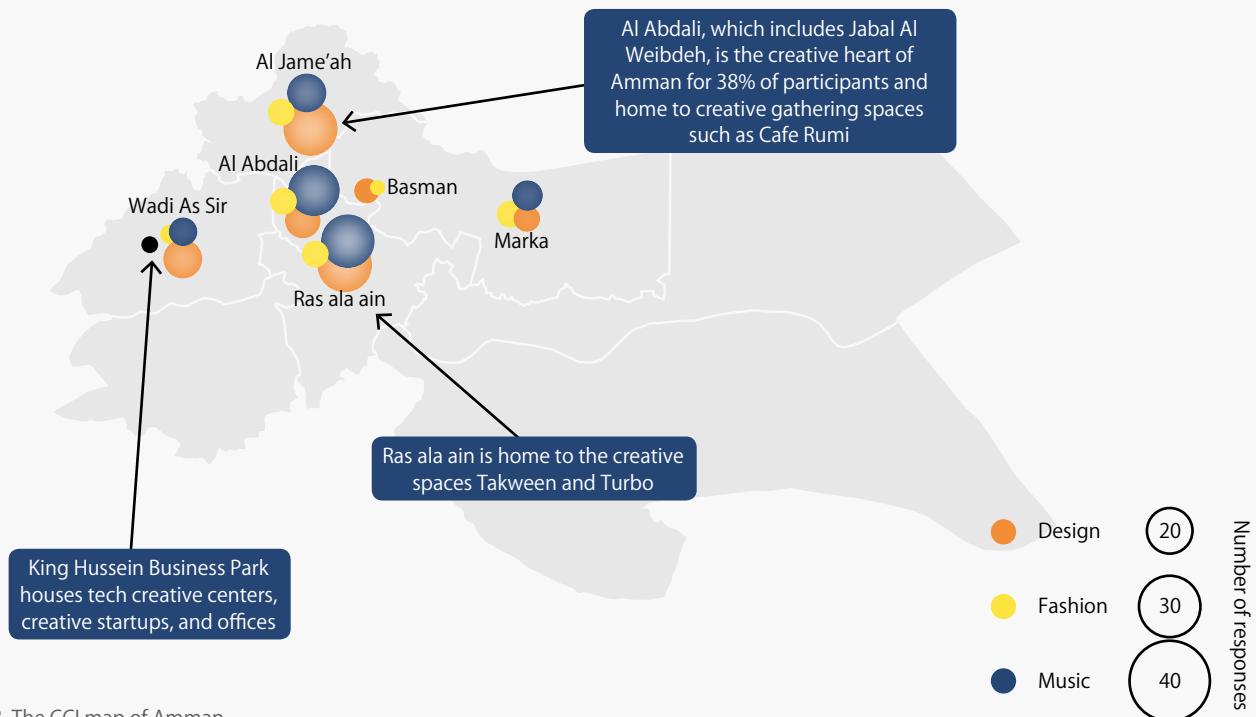


Figure 3. The CCI map of Amman



"To me it was fun to build myself an identity in the online space. You can be one guy in a bedroom and have a huge, powerful visual identity, as powerful as the biggest company and you can actually cut costs, saving on rent, interior design, and staff of a representative office or shop that you might otherwise need to impress customers."

— *Mazen Alali, Architect and multidisciplinary designer*



"We don't know what's going to happen to Amman Design Week, Jordan Fashion Week, music festivals; are they going to survive Covid-19? I am not even sure. They have been a big support system for everybody, really the main platforms for creatives to grow culturally and professionally, and they might even dissipate in the next year or two."

— *Shermine Sawalha, Cultural manager and event producer*

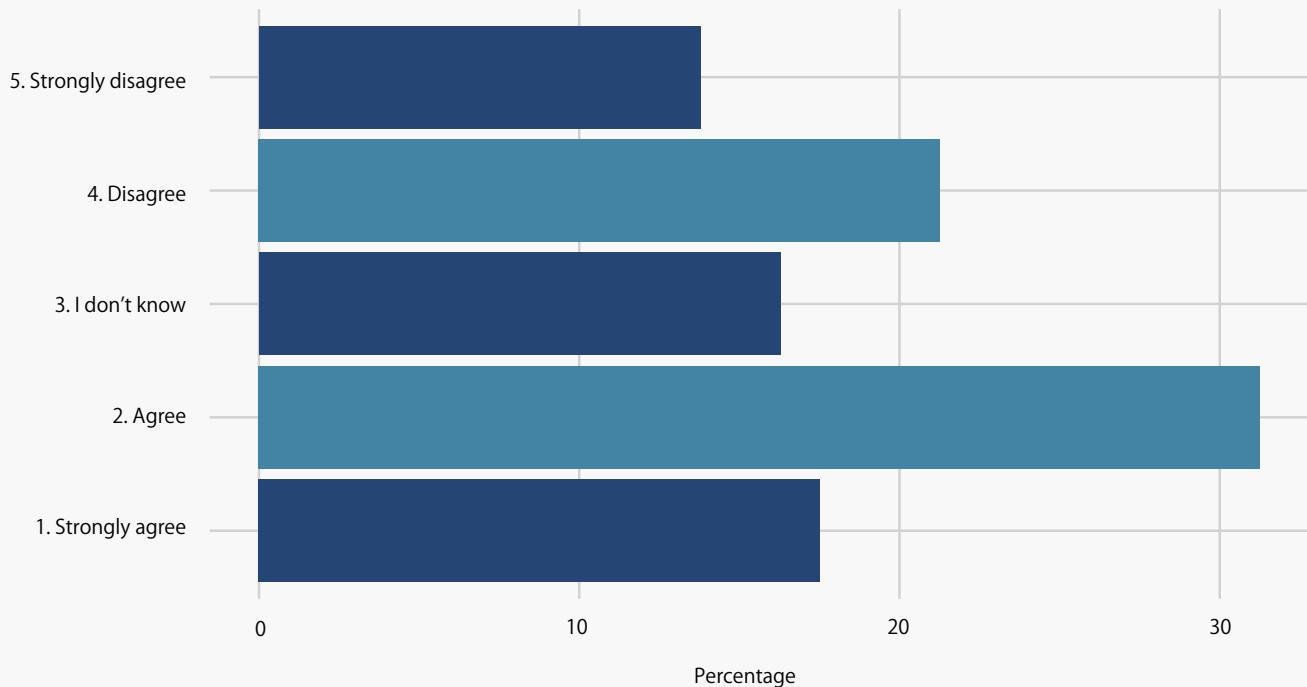


Figure 4. "To what degree do you agree with the following statement: After March, 2020, I was able to move my work to a space with more Covid safety and remain productive." n = 80

DRIVERS FOR DEVELOPMENT

- Access to affordable technology and an available and affordable internet connection are thought to be the most pressing needs, followed by a need for access to finance, healthcare and welfare, and appropriate, affordable, workspace. Electronics and technology are expensive after import tax making it hard for people to access affordable technologies (Figure 5).
- Appropriate, affordable, workspace is a strong need. Focus group comments suggest the need for more spaces to meet, share and learn from each other. This is consistent with Amman's relatively low number of performing and music venues, something raised by different stakeholders in the focus group.
- Subjects felt they had relatively higher levels of access to non-profits, local organizations, and local officials than those in other cities.



"As a fashion designer who just launched her first collection in the middle of the pandemic, it was hard for me to gain the trust of clients just by my social media and without them having the chance to touch the materials I use and see the quality of my products."

— *Shorouq Mazraawi, Fashion designer*



"Design — many times that's not about a tangible object or something that you can feel. It is something visual. So it's easy to sell online because what clients see is what they get. But when you're selling furniture or fashion, you might be afraid and ask, what's the quality in reality compared to the pictures."

— *Mazen Alali, Architect and multidisciplinary designer*

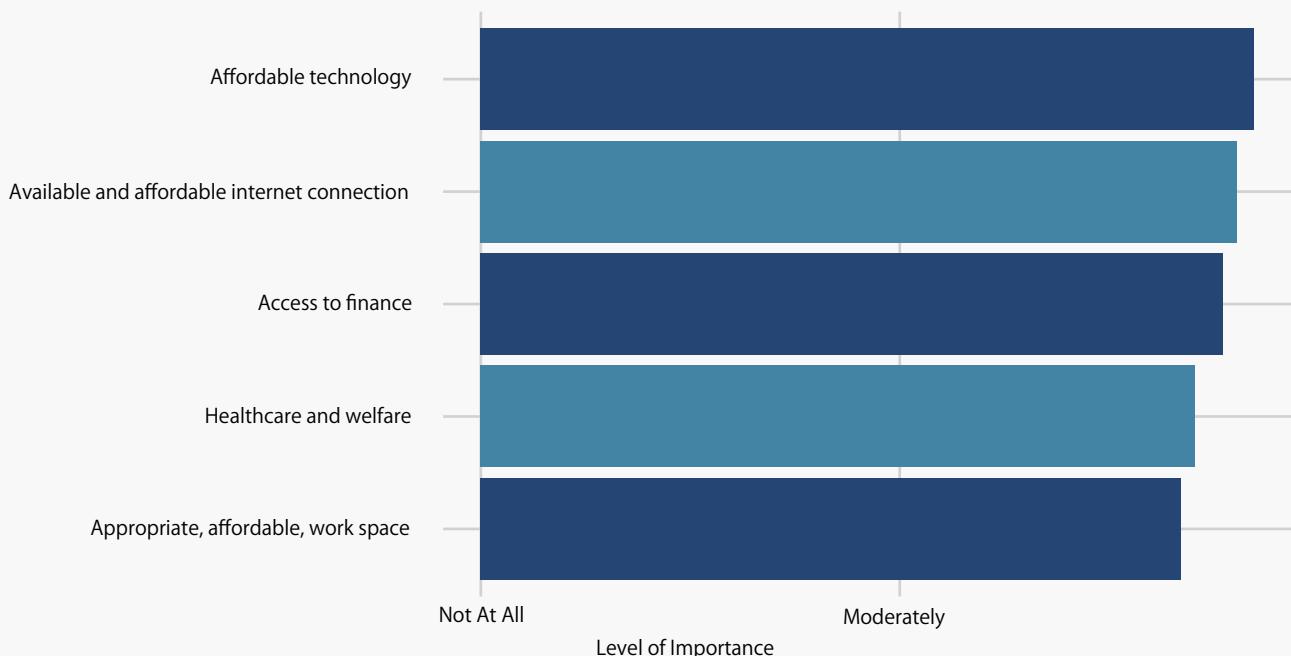


Figure 5. Top 5 responses to "How important are these goods, services and concepts to the success of your work?" n=91.

Strengths

- The design sector is developed, resilient and co-produces positive externalities with the fashion and music industry.
- The music scene has built a collaborative exchange with vibrant scenes in Ramallah, Haifa, Beirut, and Cairo and has seen a noticeable increase in international attention and reputation.
- Online platforms that were born during the pandemic such as *Radio Al-Hara* or *Live Music Jo* are case studies that underlie the scene's innovative drive and adaptability.
- All sectors have strong international connections.

Weaknesses

- Jordan's audiences are not used to paying for cultural performances and especially online shows.
- There are high levels of informality compared to other cities surveyed. Participants reported that running a registered business is extremely costly and bureaucratic.
- Taxes are reported to be high. This makes electronic devices and new technologies very expensive in Jordan.
- Universities seem to have little connection to Amman's creative hubs and communities.
- Lack of inclusive sector networks hinders the equal dispersion of information about opportunities for funds, training, and other forms of support.
- Participants report wide generational and social gaps between the "scene community" clustered around Al-Weibdeh, and an older generation of well established CCI professionals and artists.

SWOT ANALYSIS

Opportunities

- The pandemic has accelerated the digital transition of the creative industries.
- In the design sector there are recognizable efforts to build platforms and spaces (*Amman Design Week* / Platform / *Takween, Design Institute Amman*) which potentially carry the seed to consolidate structures for advocacy.
- In the music sector, crowdsourced initiatives like *Radio Al-Hara* have likewise established successful networks that may provide resources for advocacy work.
- Crowdfunding is beginning to find dispersion in the region and might still offer greater potential.
- There is openness for dialogue with government engagement with sector development (although this is commonly not regarded as a priority).

Threats

- Governmental responses to Covid-19 have noticeably increased social segregation. This increase underlines the future need to rebuild relationships.
- Socially important hubs are reported to have closed down or are forced to relocate.
- While freelancers reported that they have been hit less hard compared to business owners, spaces where they often work from—such as cafés—were severely hit.
- Amman Design Week* and other platform events are considered to be endangered.
- Participants reported that efforts in building their online presence frustrate and exhaust them, as the success of their efforts is often ambiguous and not directly monetized.



© Amman Design Week 2019

Wehda exhibition at the creative space Turquoise Mountain during Amman Design Week 2019. Unit, unity and isolation are among the various possible translations of "Wehda" in Arabic.



"What's missing— in terms of a creative support network—is more resources on the business side of music. Because musicians aren't educated in ways to run themselves as a business. They are educated in their technical skill and their creative expression. But they are not trained in their accounting, their lawyering, when you have to review contracts, in their marketing and branding. And so that's what's needed now to have strong, thriving musicians."

— Dana Dajani, Writer and performer



IRAQ | SULAYMANIYAH

During our investigations, we kept hearing stories about one city: Sulaymaniyah, the traditional capital city of the Kurdistan region of Iraq. ‘Suli’, to give it its local nickname, is a university city boasting an active and educated young population. Its reputation for creative vibrancy has spread throughout the region and beyond. One of our partners in Amman (Jordan), told us, “I’ve been hearing so many rumors about this place lately. The young generation there is onto something, they are hungry for art! Anything they can get their hands on they soak it in like a sponge. And they know everything that’s going on outside from YouTube.”

One reason for the city’s reputation as a vibrant cultural centre stems from the fact that in 2018, after several years of campaigning, a bottom-up artist initiative convinced the Kurdistan Regional Government (KRG) government to transform an abandoned tobacco factory into the largest arts and cultural centre in Iraq, if not the entire Middle East. This iconic industrial space was to become a *“Culture Factory”* full of exhibitions, workshops, technology hubs and sports facilities. Using oil revenue, the government initially planned to invest 50 Million USD, but with the steep fall of the oil price after Covid-19 hit, the budget was subsequently slashed to 4 Million USD. Even so, a clear sign of government buy-in and support.

This reduced government investment turned out to be a blessing in disguise. Rather than being subject to a top-down master plan, the entire compound was slowly colonized by bottom-up initiatives according to real needs. Today, the partly-refurbished building features the youth centre, *X-Line*, which hosts workshops for young aspiring artists, a practice space for a rock band called Nova, meeting rooms for science and writing clubs, a miniature skate park run by a skate and graffiti collective called Boneless, and a cafe. Finding such a condensed cluster of creative disciplines provided a perfect key for our city research.

The respondents paint a picture of a city that is in clear need of government-level initiatives and investment: to support the existing, nascent creative infrastructures, to improve educational facilities, creative resources and skills bases, and to break down cross-generational prejudices and assumptions around working in the CCI. In other words a socio-cultural structure that can bring people of all ages together and help them realize their visions for the future of Suli.

KEY FINDINGS

- The pandemic has had mixed effects in Sulaymaniyah. The city fared better than average in some survey indicators, poorly in others.
- The sample in Sulaymaniyah has the lowest rates of business registration across cities surveyed. This reflects the difficulty of doing business in Iraq.
- There is a significant mismatch between the educational offer and the skills required by the labor market, including the creative sector.
- The Sulaymaniyah sample reported the highest rates of unemployment (18%) - this fact, combined with a relatively high number of freelancers working at reduced income, point to significant underemployment in the creative sector.
- There is scope for strengthening the creative-digital nexus in Iraq by increasing access to the internet and to digital financial accounts. There is also a demand for better access to digital hardware technology.
- There are three needs that are of exclusive importance in Sulaymaniyah — additional education and training, appropriate, affordable work space, and social acceptance.
- More than half the survey participants reported very strong optimism about the future of their creative work.



“Everything that I wanted to learn—and that's not just me, that's everybody in this region—we just go online and find the resources.”

— Seveer Saman, IT specialist

FACT SHEET:

Overview

- Sulaymaniyah is an important city of the semi-autonomous Kurdistan region of Iraq. It is home to a number of universities. 1.78 million people live in the region — half in the capital Sulaymaniyah.¹ 38.43 million people live in Iraq.²
- Compared to other regions in Iraq, Sulaymaniyah has a higher proportion of people enrolled in secondary schools and fewer people living below the poverty line. For example, according to estimates, enrolment in secondary schools is 54% nationally³, but is around 78% in Sulaymaniyah. Furthermore, women represent 20% of the labour force, a proportion that is higher than the national average.⁴

Economy

- According to the World Bank, Iraq is an Upper Middle Income country with a Gross National Income per capita of \$10,830.⁵
- Iraq is one of the largest global exporters of oil globally. Since the pandemic, weaker oil prices are impacting public debt levels, spending, and exchange rates; making imports more expensive.
- UN-Habitat estimates that the conflict with ISIL left 6.7 million people in need of humanitarian assistance. Reconstruction will cost \$100 billion.
- 13.7% of the total labor force is unemployed. The International Labour Organisation estimates that 22.52% of total workers are self-employed.
- The poverty headcount ratio at \$1.90 (2011 PPP) a day is at 1.7% of the total population, while data using national poverty lines highlights that 18.9% of the total population lives in poverty.⁶ The bottom 40% of Iraqis 40% shares 11.6% of the national income⁷, one indicator to measure the UN Sustainable Development Goal 10.1.⁸

Business Environment

- Historically, Iraq has been one of the Middle Eastern countries with better infrastructures and a business environment marked by strong manufacturing, and research and development sectors associated with the oil industry.
- Iraq currently ranks only 172 out of 190 countries in the World Bank Ease of Doing Business Report, scoring well below the regional average for starting a business and with access to credit being a critical issue.⁹
- Only 49.4% of the total population has internet access.¹⁰ 22.6% of people age 15+ have an account at a financial institution or with a mobile-money-service provider.¹¹ Both indicators are below the regional average. The population's access to electricity in urban areas is 100%.¹²

Creative Industries

- UNCTAD has no country specific data for the creative economy in Iraq for the period 2005-2014, although Iraq is an important export and import destination for neighboring countries, including Jordan and Lebanon.¹³
- A recent partnership between the World Bank and UNESCO called "Culture in City Reconstruction and Recovery (CURE)" focuses on urban regeneration of the cultural and creative industries, as a driver for reconstruction. The framework proposed by CURE puts culture at the centre of post-war city reconstruction and recovery, by leveraging the role of people and place-based policies in urban projects and city development strategies.¹⁴

¹: IAU, 2010 and NCCI 2015.

²: UN Population Division's World Urbanization Prospects, 2018.

⁴: UNESCO Institute for Statistics, 2019 (2010 Data).

⁵: NCCI 2015.

⁵: GNI per capita, PPP (current international \$); World Bank, 2019.

⁶: World Bank, 2012.

⁷: World Inequality Database, 2019.

⁸: "By 2030, progressively achieve and sustain income growth of the bottom 40 percent of the population at a rate higher than the national

average".

⁹: World Bank Ease of Doing Business Report, 2019.

¹⁰: International Telecommunication Union World Telecommunication, 2019.

¹¹: World Bank Global Financial Inclusion Database, 2017.

¹²: World Bank, 2018.

¹³: UNCTAD, 2014.

¹⁴: UNESCO and World Bank. Culture in City Reconstruction and Recovery (CURE), Position Paper. Paris and Washington, 2018.

DATA ANALYSIS

The Creative Community

- A significant portion of our 69-person survey sample is reported to have come from the local orchestra, so there is some bias in the results towards their particular level of training and job characteristics.¹⁵
- The survey sample was the youngest across cities, with a majority of creative people in the age group 18-24. The sample was in line with other cities in the study in that more men (59%) than women were surveyed.
- A very high proportion of the sample is university educated (61%). A significant number reported to be self-employed or freelance (44%).
- Music is the dominant industry in the sample, followed closely by Design and Fashion. Compared to other cities, there is a higher proportion of people in the professions of modeling and instrument playing (Figure 1).
- Across all cities surveyed, Sulaymaniyah has the highest proportion of creatives who are self-taught (44%) and who learned skills online (24%). This may indicate a mismatch in skills taught in schools and universities — Sulaymaniyah has a very high degree of young creatives

¹⁵ Please note, however, that in our sample for Music about one fourth of survey participants is from the same music orchestra.

educated enrolled in universities. The focus group highlights that art degrees in universities generally lack a good reputation and that many key fields of creative expertise—e.g. digital design—are not, or only poorly taught. Online teaching by universities during the pandemic was also reported to have been of poor quality.

- Business registration in Sulaymaniyah is the lowest across the cities surveyed. Of the 32 business owners or freelancers who responded, only 26% of said their business was registered — the rest either said “no” or refused to say either way. This represents a result that is in line with Iraq’s low international ranking in business formation.



“The biggest thing I lost was my mind. It wasn’t just hopes and dreams. I lost my mind! I lost my inspiration, my motivation, the thing that was pushing me. I was so far from it that it died after a while.”

— K-dyako Saman, Rapper

Industry (Total n)	Music (30)	Design (27)	Fashion (23)
Top job roles (n)	Instrument Playing (24)	Graphic Design (11)	Design (14)
	Composing (7)	Management (11)	Modeling (12)
	Music Production and Recording (7)	Design (10)	Marketing (7)

Figure 1. Top three job roles in the creative industries

The Impact of the Pandemic on the Creative Economy

- The picture of the impact of the pandemic shown by our survey is mixed. Like most cities in the survey, the Music sector was particularly hard hit.
- The Sulaymaniyah sample had the highest number of people reporting they were not working at all right now (18%), and the share of full-time workers has declined. The baseline for creative employment was already relatively low.
- Sulaymaniyah was the only survey city where a majority of participants reported working less than 35 hours per week in 2019. However, the share of part-time employment was fairly steady from 2019-2020. (Figure 2)
- The creative community in Sulaymaniyah has started to feel the impact of the pandemic relatively recently. The median length of unemployment was reported as being two months, whereas other cities median lengths ranged from 5-11 months. This may be an artifact of small sample size.
- There was not a single business owner or music professional who reported making the same or more money in 2020 as they had in 2019. Only 30% of the survey sample reported that they had maintained their standard of living during that period.

- Subjects in Sulaymaniyah report that the standard of living relative to working income did not drop as much as in other cities, with fewer than 50% claiming that income and aid received was not adequate to maintaining pre-pandemic standards.
- Sulaymaniyah is also an outlier in the type of subsidies received by the creative community, with professional training representing a larger proportion than for other cities.



“Right now, the city is ubiquitous with digital media agencies and they are all hiring people that have only a very basic understanding of graphic design. And at the same time, the demand is there.”

— Seveer Saman, IT specialist

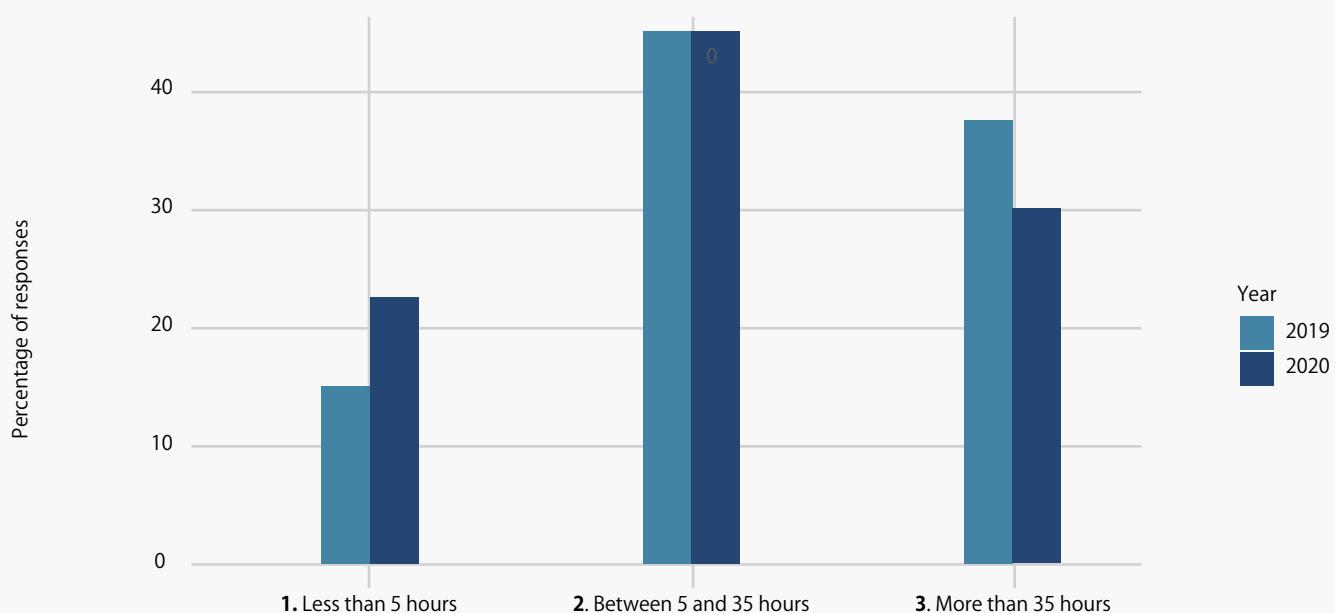


Figure 2. Hours per week in creative employment, 2019-2020, n=61

CREATIVE SPACES

- Creative work is spread throughout the city. The Northeast is the most frequently reported location for creative work, followed by Southeast, which is particularly important for Fashion (Figure 3). Saholaka Street, in the city center, was mentioned by survey participants as being the “key to the [creative] city.”
- Music and performing venues were the most important spaces for the sample. Public spaces were not as important compared to other cities, a significant finding when analysed in conjunction with a stated need for more public acceptance for creative work.
- The focus group notes that any event in public larger than 10 people needs governmental approval which is not easily received, even prior to Covid-19.

- More than 50% of the sample reported that they were able to find Covid-safe spaces to maintain their productivity levels, despite the pandemic. This may be due to the relatively high number of people surveyed already working from home, compared to other cities.
- There is a wide variety of independently-owned or run spaces for creatives to socialize, work, and exhibit. The availability of such spaces was described as an important infrastructure for freelancers who prefer co-working from centrally located cafés rather than renting a private workplace, or for contemporary musicians who find in small venues clustered around Saholaka Street; micro spaces of social acceptance and community.
- Extra-curricular arts clubs at universities and socializing at creative venues around Saholaka Street have been reported as important entry points for the creative community.

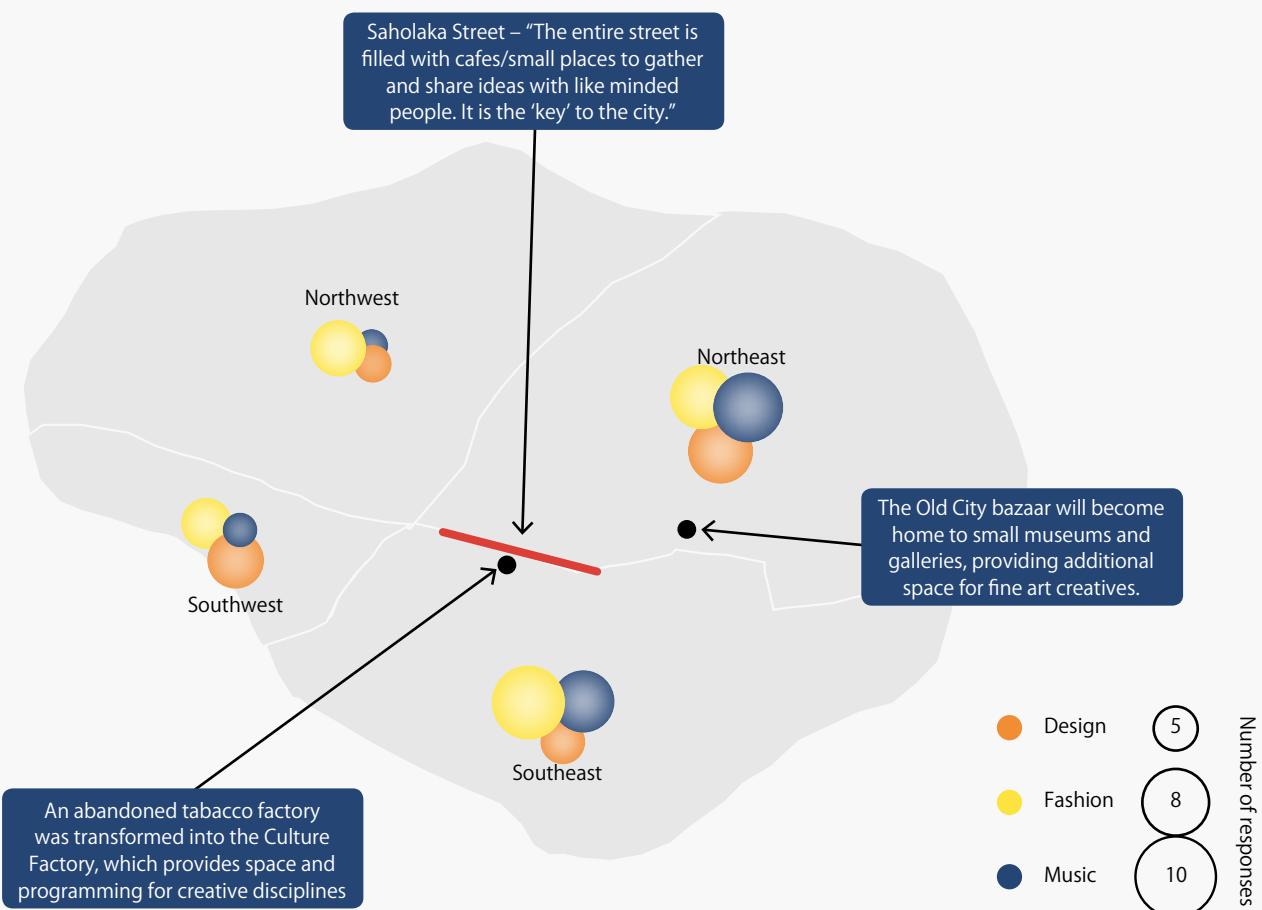


Figure 3. The CCI map of Sulaymaniyah

DRIVERS FOR DEVELOPMENT

Success Factors

- Access to affordable technology and available and affordable internet connection were top priorities in Sulaymaniyah, in line with all other cities surveyed. There are three needs that are of exclusive importance in Sulaymaniyah — additional education and training, appropriate, affordable work space, and social acceptance. The latter is of particular importance, as it stands out as a key priority relative to other cities (Figure 4).
- Sulaymaniyah's creative community reports a higher degree of access to officials and NGOs than any of the other cities of our sample.
- Sulaymaniyah's survey group was very optimistic about the future — 54% expressed strong feelings of optimism.



"I opened my start-up with the help of an incubator program. We wanted to produce T-shirts and hoodies—but when Corona started, nobody would buy this type of clothes anymore. So we changed our idea and started producing face masks with special embroidery. After some time, we suddenly got huge orders from schools and universities. (laughs) I am really scared that Corona goes away, we would lose a lot of customers!"

— Noor Muhsin, Fashion designer

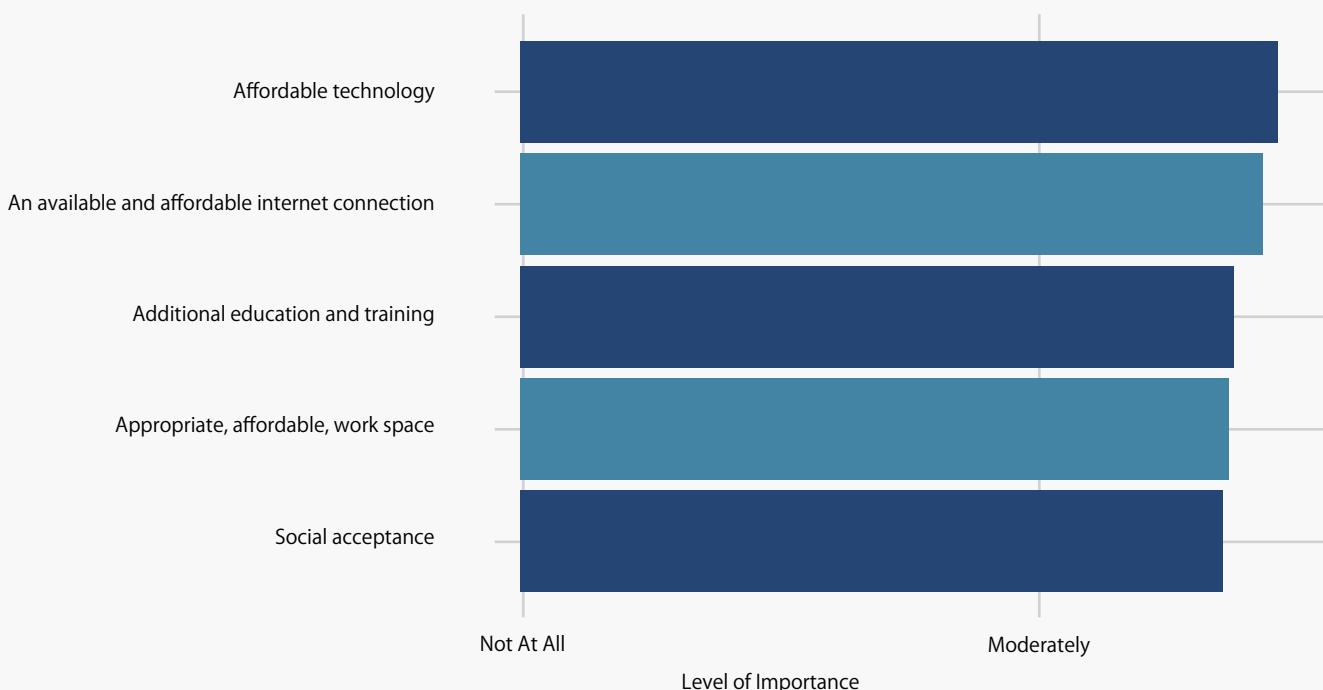


Figure 4. Top 5 responses to "How important are these goods, services and concepts to the success of your work?" n = 69.

Strengths

- Sulaymaniyah enjoys a regional reputation as a cultural capital with a strong tradition in literature.
- With the "Culture Factory" the city provides an outstanding space to diverse creative communities.
- Creatives see more opportunities than risks in digitization and are thirsty to use new technologies.
- Suli Fashion Week, an independent initiative from the fashion sector, has built a bottom-up platform event with regional outreach.
- Survey participants report good access to stakeholders and high levels of optimism.

Weaknesses

- There are huge hurdles for freelancers and small businesses to participate in regional and international trade. This is due to lack of digital payment infrastructure, poor transport logistics, bureaucratic requirements for transnational trade, and lack of centralized and comprehensible guidelines.
- There is little public awareness of the potential benefits that more cooperation between creatives and entrepreneurs can generate.
- Focus group participants reported that their professional development is hampered by social stigma. Families, for example, hesitate to provide financial support for careers in the creative industries.
- Art education is considered poor and there is a lack of degrees for creative jobs in demand such as graphic design.
- There is high demand for digital design jobs but a low supply of skilled workers. Unskilled workers compete for badly paid jobs.
- Foreign aid programs are reported to focus too often on single interventions rather than building sustainable structures and social relationships.

SWOT ANALYSIS**Opportunities**

- There is an opportunity to use the digital shift created by the pandemic to increase eCommerce.
- Digital platforms / apps for delivery services and payments could create synergies with the creative sector.
- Local producers report increased local appreciation during Covid-19.
- Lockdown measures strengthened online communities of creatives and increased exposure of their work.
- Digital skills are generally reported to be self-taught and there is room for training.
- The local Kurdish government has been showing remarkable financial support for the culture sector.

Threats

- There is a lack of tutorials on YouTube and elsewhere online in Kurdish language.
- Performers of non-traditional music (e.g. Hip Hop, Heavy Metal) reported being stigmatized and facing resistance to hold events, use spaces, and speak freely in their music.
- There is a lack of awareness on copyright laws and royalties.
- Social stigma, censorship and physical safety are key threats for the sector, especially for musicians of non-traditional genres.



© X-Line 2021

Voices of Creatives' focus group interviews in Sulaymaniyah took place in collaboration with X-Line at the Culture Factory as a hybrid, on- and offline event. In this picture: Shero Bahadar (right) and Shatoo Gurji (left).



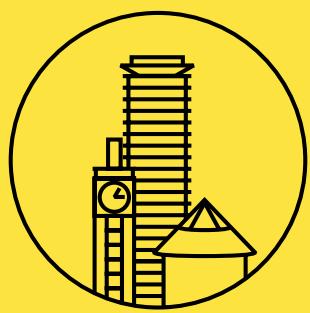
"What the artistic community needs the most right now is to be guided professionally. We have talent, we have passion, but we sometimes don't see the right path to get to where we want to go. Language skills are an asset for being able to find know-how online - but not everyone has that ability. And either way, we need professional mentors."

— Shatoo Gurji, Art director



"The problem with international clients is the payment. Paypal doesn't include Iraq in its services so we are subject to many fees for international transactions. We're locked in here with clients who are not educated about the work of designers, so whatever output we give them, they won't understand how to use it properly and what value it has. And when we look abroad for different sorts of clients who understand our work, it's not feasible because of fees and taxes."

— Seveer Saman, IT specialist



KENYA | NAIROBI

In Nairobi, despite the current stasis experienced by the local music industry, there are grounds for some optimism. Digital business methods are firmly entrenched in the Kenyan capital, with various forms of e-payment widely available. The ongoing cooperation between CCI and financial tech companies has borne fruit in terms of trust and adoption; with online spaces ranking as the most important spaces for business by the Fashion and Design sectors in our survey.

Despite the steady growth of a highly educated entrepreneurial middle class, our Nairobi respondents were quick to point out that their positions and working practices, as creatives working in the sector, are still relatively vulnerable. A lack of legal regulation and representation, especially in contract and copyright law, and fractured government services, hinders further growth in a country where almost half of the workforce is self-employed. Noticeable too, is the resourcefulness of these creative entrepreneurs. The admission that many used self-teaching methods to acquire the skills they needed suggests a dearth of skills on offer at institutional level, and an official lack of understanding of the needs in the marketplace. Wider ranging and less expensive digital access alongside more favorable access to finance and credit could be of untold benefit.

The country's music industry has been badly hit by Covid-19. Known for having a strong musical heritage, with a number of new artists and scenes earning an international profile, local music scenes have suffered from having their main sources of income and profile, "mobile music" and live performance, stripped away. The shift to online is difficult with few seeing any benefit. Artists need better representation, too. The future status of performance spaces—namely what will be left, and what is needed to get the industry back on its feet again - is also set to become a real issue post-pandemic. Respondent Fadhlilee Itulya's passionate address at the state of the industry could be used as an official memo. "The Kenyan music industry has a long way to go. [...] So much mentorship to be given [...] so much money on the loose, from tracking agencies to collecting associations; so much legal work to be done from IP to contracts and endorsements; so many systems to be put in place from artist unions by artists themselves...we have so much to lose."

KEY FINDINGS

- Nairobi's survey sample reported a high degree of optimism about the future.
- The creative industries adapted well to the digital shift brought about by the pandemic. This may be an indication of the health of the business environment in Nairobi, where collaborations between the CCI and financial tech companies are strengthening the growth of the sector.
- The Music sector was hit the hardest by the pandemic. It relies on live performances and is the least adaptable to digital technologies. In general, lack of spaces is an issue.
- Some factors threaten the growth of the sector—the cost of space and technologies, as well as a mismatch between labor supply and demand. While skills are abundant, wages and standards of living are low.
- There is a need to sustain the demand for creative goods and services with dedicated city development strategies and industrial policies. National, regional and international collaboration and investments could play a positive role.
- The Westlands area of Nairobi is an agglomeration of multiple, localized creative industries, and has an outsized importance to each industry in the survey.



"The Kenyan music industry has a long way to go. We have not yet explored our options and therefore there is a lot of exploitation. There is so much untapped talent, so much undiscovered gifts. So much civil education to be done, so many art clinics to be hosted. So much mentorship to be given so much apprenticeship to be passed on so much money on the loose from tracking agencies to collecting associations, so much legal work to be done from IP to contracts and endorsements, so many systems to be put in place from artist unions by artists themselves...we have so much to lose."

— Fadhlilee Itulya, Musician

FACT SHEET:

Overview

- Nairobi, population 4.4M, is the capital of Kenya.¹
- National population is 53.5 million.
- The urban population is 27% but it is projected to rise considerably.² The provision of housing is a top priority.
- Kenya's population is relatively young, with 31.4 million people aged under 24, and 39% of the total population aged 14 years and younger.³
- Access to quality education is a challenge - 11.5% of the school-age population 17 and older are enrolled in tertiary education.⁴

Economy

- Kenya has a Gross National Income per capita of \$4,240.⁵
- Kenya's economy grew steadily since 2014 with a rising entrepreneurial middle class. The medium-term economic outlook is positive as international credit assistance remains favorable.⁶
- Poverty remains a major challenge. Poverty headcount ratio at \$1.90 a day (2011 PPP) is at 37.1% of the total population. The bottom 40% owns as little as 9.4% of the national income⁷, one indicator to measure the UN Sustainable Development Goal 10.1.⁸
- The International Labour Organisation estimates that 49.27% of workers are self-employed.

Business Environment

- Kenya has fragmented services. Adequate infrastructures are often absent in Nairobi's large informal settlements. 83.9% of the urban population has access to electricity.⁹
- Kenya's business environment is one of the strongest in East Africa. Kenya ranks 56 out of 190 countries for ease of credit access.¹⁰

- It is an attractive market for financial technology investments. The national diffusion of the e-payment system M-Pesa has contributed to high levels of financial inclusion. A staggering 82% of people aged 15+ have an account at a financial institution or with a mobile-money-service provider. Internet penetration is low at 22.56%.¹¹

Creative Industries

- Kenya is home to thriving cultural and creative industries. Data from 2013, the last year available for comparison, indicate that creative goods exports were valued at \$40.9m and imports at \$195m.
- Important industries are Films, TV, Radio, Gaming and Publishing, while emerging sectors are Graphic Design and Fashion. Fashion is believed to be a major growth driver - the textile industry is a part of transnational supply chains.¹²
- Nairobi is home to several creative service operators. Heva Fund, for example, is "Africa's first dedicated finance, business support and knowledge facility for creative industries." The Fund regularly produces high quality reports on the state of the creative economy in sub-Saharan Africa and is building strategies to strengthen cooperation between CCI practitioners, governments and the private sector.
- Music is a key creative sector, strong in cultural heritage and international popularity. Kenya has 5,773 music publishers and 12,153 musicians registered with the Music Copyright Society of Kenya. Projections for 2020 estimated that Kenya's music industries generate \$29m, primarily driven by mobile music revenue and live performances.¹³
- Kenya's CCIs are receiving increasing attention from national and international investors, as the policy framework is also evolving with the introduction for example of the COPYRIGHT AMENDMENT ACT 2019.¹⁴ "Silicon Savannah", a city development strategy around Nairobi, is also bringing new infrastructure and support from international technology companies.

¹. UN Population Division's World Urbanization Prospects, 2020. Kenya Population and Housing Census, 2019.

². UN-Habitat, 2018.

³. UNESCO Institute for Statistics, 2019.

⁴. Ibid.

⁵. GNI per capita, PPP (current international \$); World Bank, 2019.

⁶. World Bank, 2018.

⁷. World Inequality Database, 2019.

⁹. "By 2030, progressively achieve and sustain income growth of the

bottom 40 percent of the population at a rate higher than the national average".

⁹. World Bank, 2018.

¹⁰. World Bank Ease of Doing Business Report, 2019.

¹¹. International Telecommunication Union World Telecommunication, 2019.

¹². UNCTAD, 2014.

¹³. Heva Fund, 2018.

¹⁴. UNESCO, 2020.

DATA ANALYSIS

The Creative Community

- The majority of the 75-person sample were in the age group 25-34. 60% of the sample was male. The sample is also highly educated, with more than 50% having a university degree.
- The sample in Nairobi has also the highest levels of optimism across cities. This may be an indication of the thriving conditions of the creative economy in Nairobi. (Figure 1)
- While Music and Fashion are the dominant industries in our sample, they are so only marginally, as we have almost equal responses across Music, Design and Fashion. (Figure 2).
- Nearly 40% of the survey sample reported being self-taught. Given the high level of education of the sample, this suggests a mismatch in the skills on offer at formal institutions and the needs in the marketplace.

- In most cities in our survey, we observed levels of business formality in creative work below national levels. However, Kenya's creative industries sample is proportionally more formalized than national averages. This, in turn, could indicate the creative economy has strong avenues for further and equitable growth.



"The fashion industry in Kenya is still growing in my opinion. There's a lot of young talent and young designers that are extremely creative and hungry which kind of shows the direction we're heading."

— Elizabeth Magondu, Fashion designer

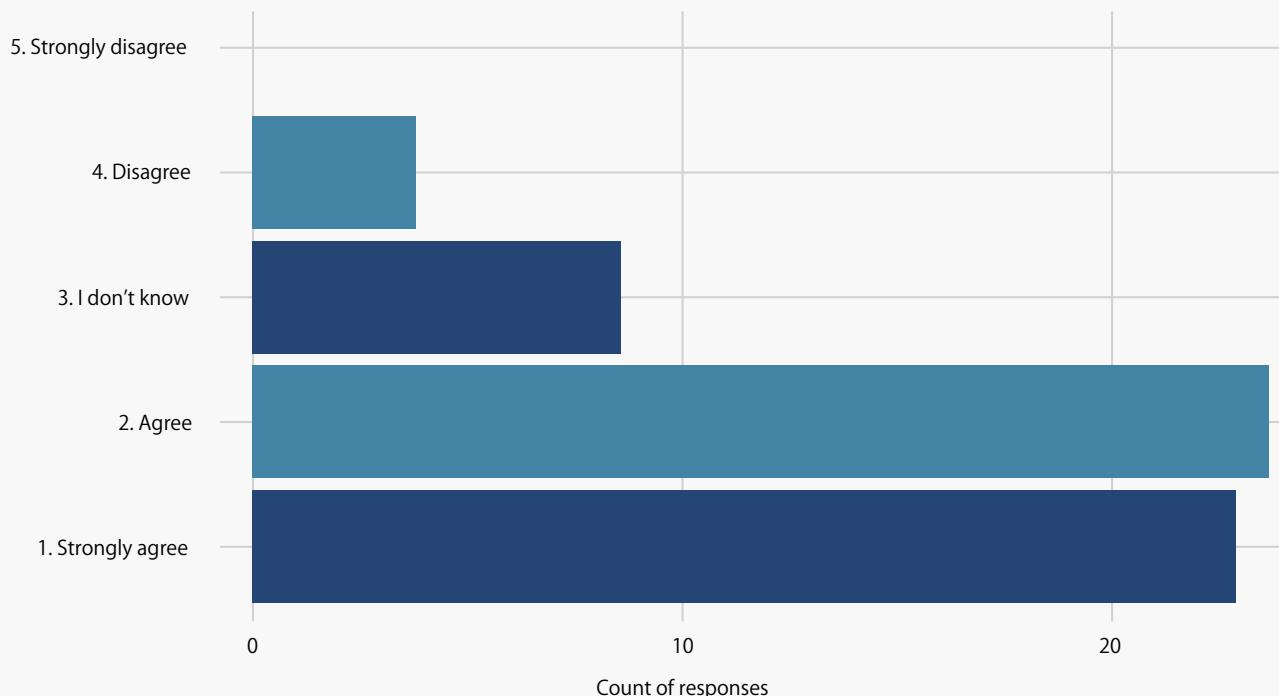


Figure 1. To what degree do you agree with the following statement "I feel optimistic about the future for my work practice. N = 67"

Industry (Total n)	Music (30)	Design (28)	Fashion (30)
Top job roles (n)	Event production (16)	Graphic design (18)	Design (20)
	Music production and recording (15)	Management (8)	Sales (11)
	Management (13)	Product design (8)	Marketing (10)

Figure 2. Top three job roles in the creative industries

The Impact of the Pandemic on the Creative Economy

- Nairobi has experienced significant economic impacts, with the Music sector particularly hard hit. 67% reported that the income received was not adequate to maintain pre-pandemic standards.
- Roughly 50% of business owners and self-employed

persons reported over 75% income loss from 2019 to 2020.

- Reported relief consisted mostly of mutual aid and family support. Nairobi, uniquely has a significant number that accessed loans (Figure 3). This reflects the availability of credit and financial technology. This debt may pose a risk, should the creative economy recover slowly.

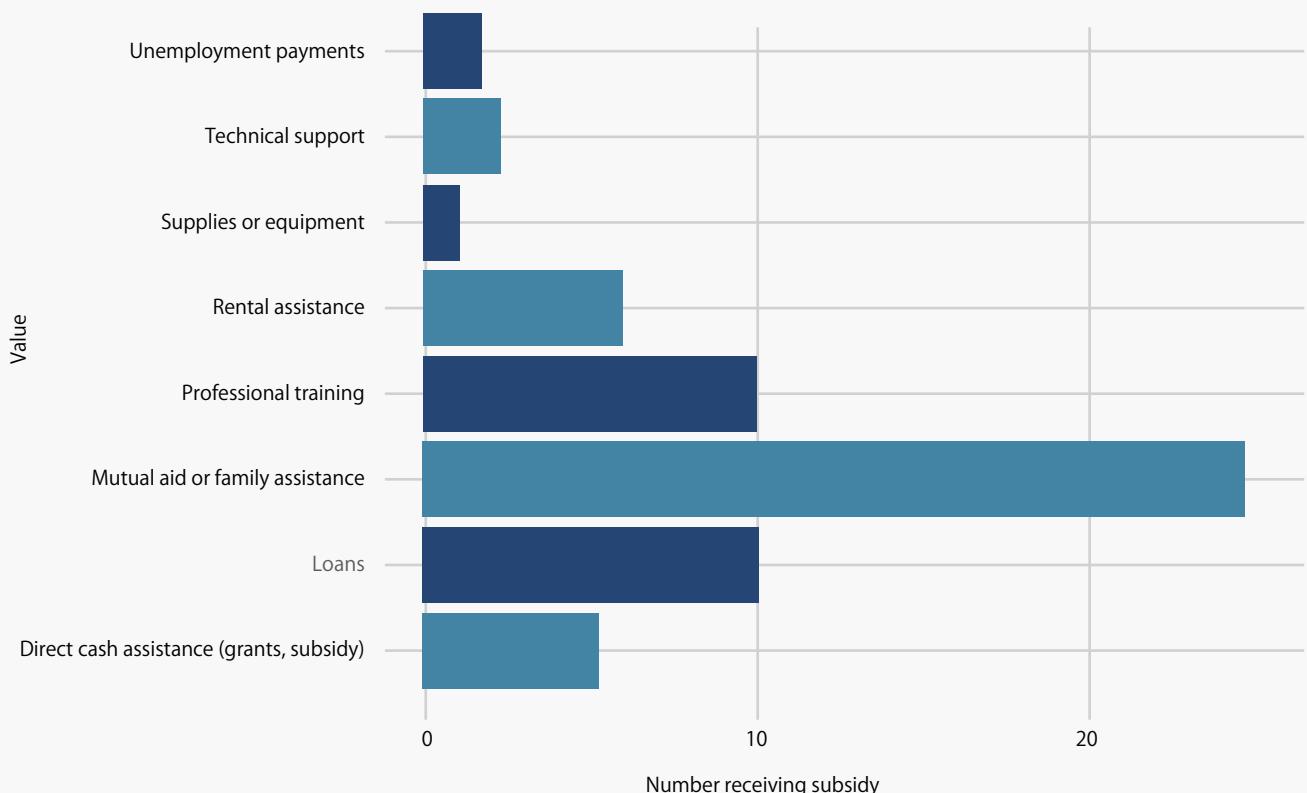


Figure 3. Forms of subsidy received. N= 75.

CREATIVE SPACES

- The top creative area in Nairobi is the Westlands, which is clearly an important cluster for all sectors (Figure 4).
- A variety of types of spaces are important to CCIs in Nairobi. Online spaces were proportionally more important here than in other cities in our survey, while light industrial spaces such as warehouses are almost absent (Figure 5).
- Nearly 50% of the sample reported that productivity levels were maintained despite the pandemic. This may be due to the relatively high number of people working online and from home.



“What percentage of young people are able to pay for data for a 2 hour concert stream?”

— *Abdi Rashid Jibril, Event curator and promoter*

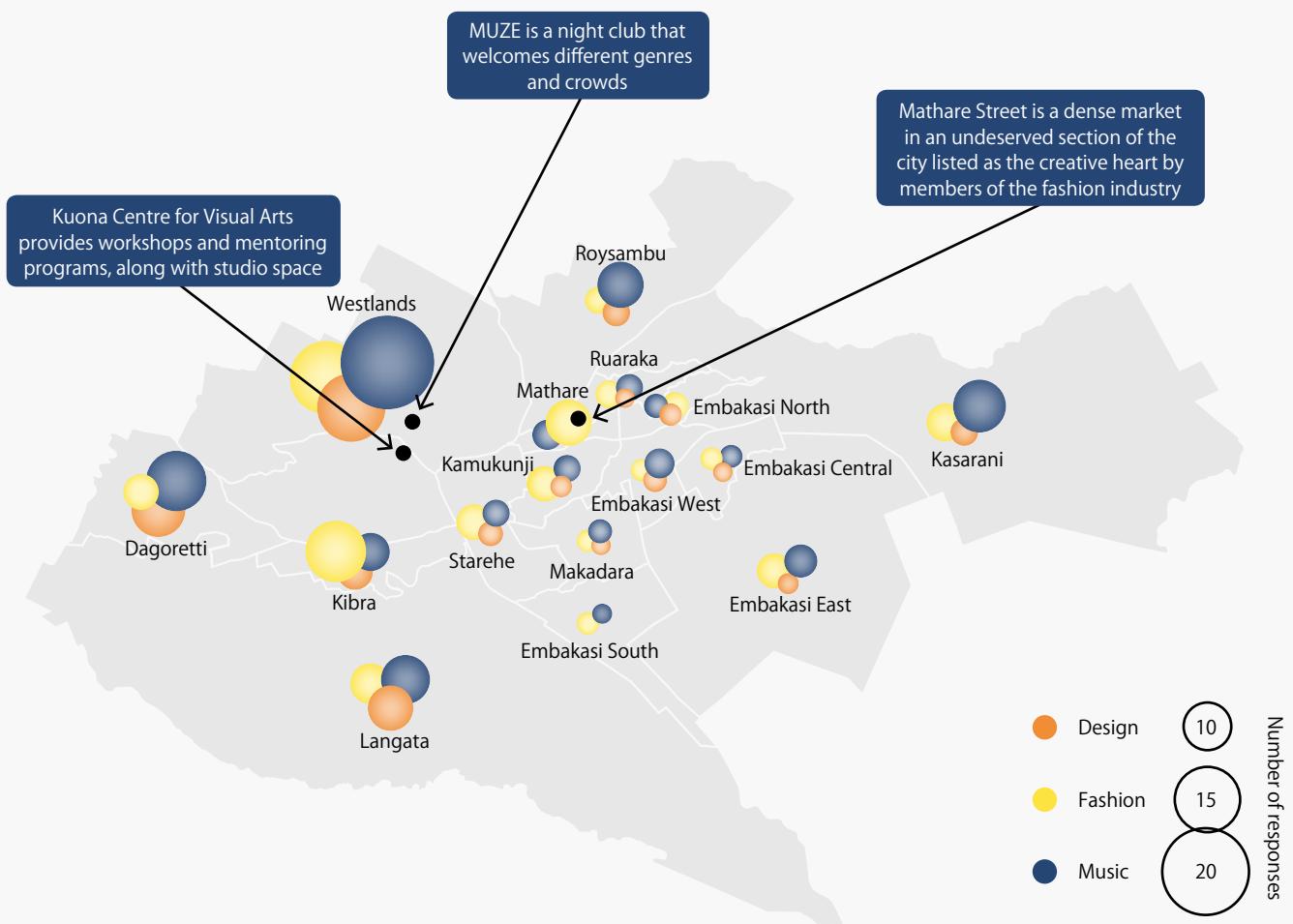


Figure 4. The CCI map of Nairobi



"Access to resources is kind of why we collaborate for my community. Our strategy and general practice is that we pool together funds and get access to what we need for a project."

— Sam Momanyi, Designer

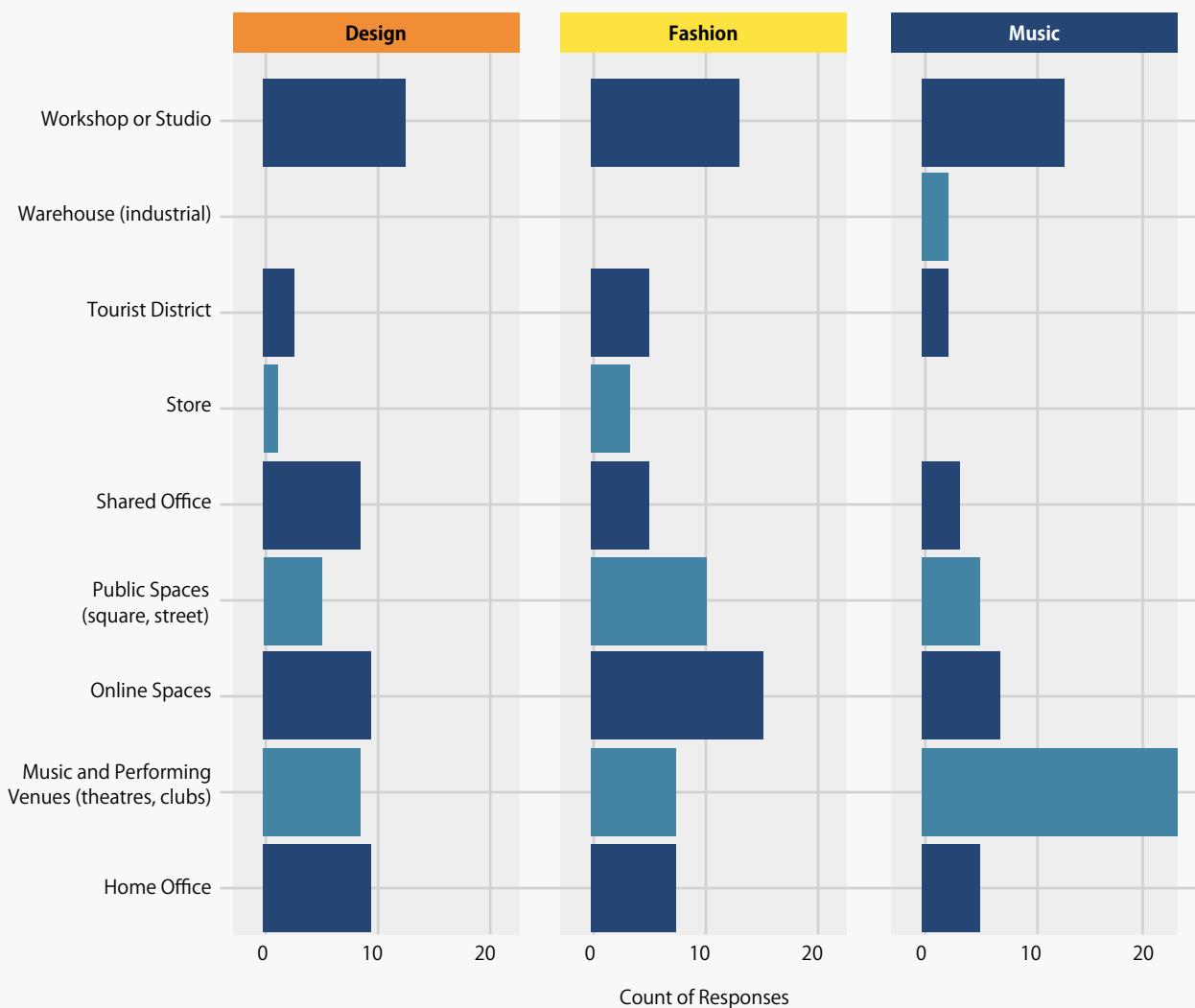


Figure 5. "Prior to Covid-19, which of these spaces were important to your work?" n=75

DRIVERS FOR DEVELOPMENT

Success Factors

- Available and affordable internet connection and access to affordable technology and are top priorities in Nairobi, in line with all other cities surveyed. Healthcare and Welfare was a key priority, a success factor that was not so important in other cities. Interestingly, while there are high levels of financial inclusion and credit is available, the need for a more adequate level of access to finance may indicate its high cost (Figure 6).
- Subjects in Nairobi indicate that access to local officials and NGOs is perceived to be low, but nonetheless important. It is currently a key priority.



"The pandemic caused disconnections in the sense that we were no longer able to attend community meetups like before. I am not worried about that much, as I am in the digital space; hence we could effectively deliver and collaborate online. The only concern would be that sometimes as humans we need that face-to-face connection to help boost creativity and collaboration."

— Victoria Mbaluka, UX designer

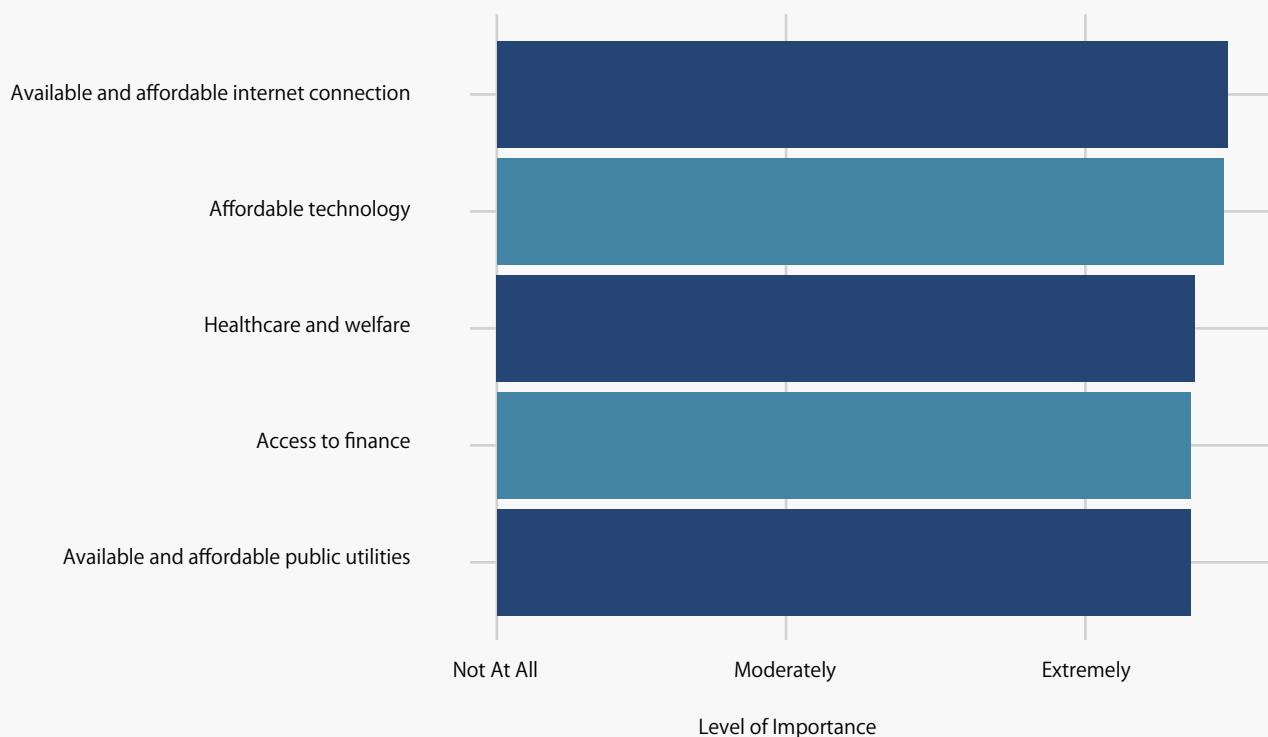


Figure 6. Top 5 responses to "How important are these goods, services and concepts to the success of your work?" n = 75.

Strengths

- The creative economy in Nairobi is thriving and levels of optimism are relatively high.
- The sample in Nairobi seemed among the most prepared to embark in the digital shift required by the pandemic.
- CCIs work closely with the digital and fintech sector.
- Nairobi seems to have a strong spirit of innovating by using digital tools across sectors: Music, Design and Fashion collaborate, share, and learn from the fintech environment.
- Digital Fashion is resilient.
- Overall, the creative community successfully adapted to online markets.

Weaknesses

- Copyright societies have very strict measures that don't serve the community.
- Access to digital markets is very expensive for artists and consumers.
- Adaptation to online performance is costly. Music artists feel less appreciated because online platforms are not favorable financially.
- Lots of important musicians from the city moved back to their rural homes due to rents.
- Fashion work has increased, but income is stagnant.

SWOT ANALYSIS

Opportunities

- Networking and collaboration is a big opportunity, especially in the fashion sector.
- Dense agglomerations in the Westlands area can be a place for multi-sector programming.
- A lot of small businesses and groups were able to grow despite isolation.
- Most companies have just been enlightened about the importance of User Centered Design.
- Artists from similar neighborhoods have built new support networks.
- The government made new connections to artists to push its Covid-19 related agendas by sponsoring community murals.
- Open-air and streaming live music sessions have generated some excitement.

Threats

- Survey subjects report a lack of creative venues and rehearsal spaces.
- Resources are expensive.
- Continued cancellations are a financial danger to performing artists.
- Lack of space results in missed opportunities for collaboration despite the large presence of creative people with skills that could be matched with other industries.



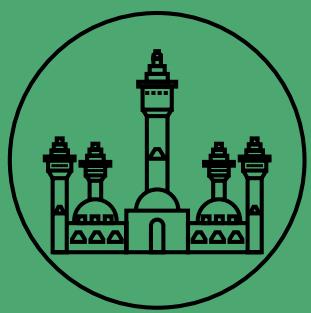
© The Eventsguru 2019

Live music show YETU (Swahili for OURS) curated by Mbogi Connection in June 2019 at PAWA254 in Nairobi. PAWA254 is a creative hub for people to meet, network, share and collaborate on social impact projects designed to foster social change.



"The biggest concern about the pandemic and its effect on your professional community is stagnation. Resources are relatively expensive to access and we have to deal with other pressing objectives during the pandemic. So with less work being done our future goals are just pending."

— Sam Momanyi, Designer



SENEGAL | DAKAR

Dakar is a cultural city, proud of its reputation and traditions. The capital of Senegal has long been revered in international musical circles for its musical styles, innovations and traditions, high levels of cultural craftsmanship and traditional methods of (musical) knowledge transfer. The Senegalese state is acutely aware of this reputation and was one of the first countries to establish a Ministry of Culture, in 1966. The country also has a history of funding artisans with state-led initiatives. The respondents reflected these settled structures when they mentioned the painful shift in readjusting to a more impersonal world. Tradition can maybe be seen in another form in the respondents' answers as, strikingly, no-one is represented between the ages of 18-24, despite the country having a young population, with just over 40% being aged 14 or under. The significant impact of the pandemic revealed the inherent weaknesses of relying solely on independent artisan business practices that reflected a tradition of relative economic thrift on a personal artistic level, balanced with a paternalistic (and often overly acquisitive) state attitude towards cultural traditions and goods.

Many creatives mentioned the dramatic adjustments to online that Covid-19 necessitated; with small, autonomous and predominantly local business and live event spaces and networks, built up over time by personal contacts, needing to shift to online to maintain any form of presence. Bibi Seck, a designer, reflected the personal element that drives doing business in Dakar, and the effect of its absence. "There's been a big emotional loss. In our industry, we often work in teams. For 4 or 5 months last year I didn't do anything. I was totally K.O." And beatmaker and producer Sidy Talla found the lack of human reaction noticeable whilst adjusting to online. "I tried to transition online through a WhatsApp group, but the results weren't very positive. People found it hard to follow online and weren't as receptive."

Despite government grants being available there was a recognition that the CCI as a whole needed to mobilize and establish new lateral and local connections. International contacts were suddenly limited, and government taxation and import policies were prohibitive, meaning a refocus on those resources and markets closer to home. Mara Ndiaye: "There were some positives to this pandemic. At the end of the year, we've seen a surge of solidarity. The Senegalese people bought local products." There is a growing realization in Dakar that the pandemic has maybe acted like a mirror, reflecting the weaknesses of the traditional ways of working back to the creative industries. Ousmane Faye: "We're seeing

a sort of rupture to a new era [...] This pandemic is changing our relationship to work and life and is asking us to find new ways to live and work together."

KEY FINDINGS

- The creative community in Dakar benefits from high levels of formalization, structure and a history of public support. The sample enjoys the highest levels of access to human resources and connections of all cities surveyed.
- Training in digital skills may be beneficial. The scale of the "digital shift" in Dakar is the largest across samples. This may signal a slower pace in adopting digital solutions to the creative economy. Online training and use of digital spaces the lowest among cities surveyed.
- The creative community sampled in Dakar is significantly older and relatively not as educated as the other samples surveyed. This may indicate the scope for a more inclusive reach in terms of age, as the group 18-24 is not represented. However, while university education is low, apprenticeships are high, further pointing out the strengths of existing cultural structures.
- Survey subjects report a lack of accessible creative space.
- The impact of the pandemic was significant and the standards of living dropped relatively more than in other cities. Access to finance remains a priority and a potential success factor, as the volume of public subsidies seems to be insufficient.



"There were some positives to this pandemic. At the end of the year, we've seen a surge of solidarity. The Senegalese people bought local products."

— **Moustapha 'Maraz' Ndiaye, Designer**

FACT SHEET:

Overview

- Dakar is the capital city of Senegal, with a population of 1.4 million. There are 16.7 million people living in the country.^{1,2}
- Senegal's population is very young, with 42.8% of the population under age 14. Enrolment in primary and secondary schools is 82% and 46% respectively.³
- While Senegal remains one of the most stable democracies in the African region, during our field research there was ongoing political tension and violent protests.

Economy

- Senegal is a Lower Middle Income country, with a Gross National Income per capita of \$3,310.⁴ Before the pandemic, Senegal had a strong economic outlook, with an annual growth between 2014 and 2019 above 5% driven by rise in services and exports.
- The International Labour Organisation estimates that 7.1% of the total labor force is unemployed and that 63.7% of workers are self-employed.⁵ Unemployment for those with advanced education is at 16.1%.
- The poverty headcount ratio at \$1.90 (2011 PPP) a day was at 38.5% of the total population in 2011, the last year for which data is available.⁶
- The bottom 40% shares only 9.5% of the national income⁷, one indicator to measure the UN Sustainable Development Goal 10.1.⁸

Business Environment

- Adequate housing and access to basic services and utilities remain a key challenge. 21.9% of the urban population has access to safe sanitation. 92.4% of the urban population has access to electricity.⁹
- While Senegal ranks only 123 out of 190 countries in the World Bank Ease of Doing Business Report, the country scores well above the regional average for starting a business.¹⁰
- Only 46% of the total population uses the internet.¹¹
- The proportion of people aged 15+ with an account at a financial institution or with a mobile-money-service provider is at 42.3%.¹²

Creative Industries¹³

- Senegal has a large creative economy trade deficit - \$77.6m imports versus \$8.6m exports. The top 3 creative goods exports are crafts, visual arts, and publishing. The importance of craft art is a unique characteristic.
- Top trading partners are Mauritania, Germany, and Gambia. The top three import countries are France, the UK, and Belgium.
- Senegal has a strong tradition sustaining CCIs. It was one of the first countries to establish a Ministry of Culture (in 1966), and has a history of funding artisans with state-led initiatives.¹⁴
- After the pandemic hit the country, The Association des Métiers de la Musique du Sénégal surveyed the CCI sector, which reported a loss of \$10m.¹⁵

¹. UN Population Division's World Urbanization Prospects, 2018.

². Senegal National Statistics Agency, 2016.

³. World Bank, 2019.

⁴. GNI per capita, PPP (current international \$); World Bank, 2019.

⁵. ILO, 2019.

⁶. World Bank, 2011

⁷. World Inequality Database, 2019.

⁸. "By 2030, progressively achieve and sustain income growth of the bottom 40 percent of the population at a rate higher than the national

average".

⁹. World Bank, 2018.

¹⁰. World Bank Ease of Doing Business Report, 2019.

¹¹. International Telecommunication Union World Telecommunication, 2019.

¹². World Bank Global Financial Inclusion Database, 2017.

¹³. UNCTAD, 2014.

¹⁴. Institut für Auslandsbeziehungen, 2020.

¹⁵. The Conversation, 2021.

DATA ANALYSIS

The Creative Community

- The sample of 48 subjects in Dakar is relatively older than the national median. A large proportion of people surveyed are in the age group 35-49. This may signal that the creative community reached in Dakar is more established and, at the same time, that there is scope to include and invest in younger cohorts such as creatives in the age group 18-24, who are nearly absent from the sample.
- Dakar had the lowest response rate across cities surveyed. Music is the sector with the highest count of responses, followed by Design and Fashion (Figure 1). Men represent almost two thirds of the sample.
- 50% of the sample did not attend university — the lowest rate for cities in the survey, but still well above national statistics.
- The creative community is largely self-taught (35%). However, there is a significant number of creatives who learned skills via formal or informal apprenticeships (26%). This is an interesting finding, which may indicate the presence of distinctive characteristics of the Senegalese CCIs.

- Those who report learning their skill through online training is low (8%).
- Dakar is also unique in that a large proportion of the sample reports owning a business, with an equally high proportion of freelancers and self-employed.
- Compared to all other cities surveyed, Dakar has, by far, the highest level of business registration (86%) and, consequently, the lowest rate of CCI businesses operating informally in this survey. This might be a function of the age bias in the survey sample.



"We suffered considerable losses because 60% of our revenues came from artists through music videos, and it all stopped. If artists don't have revenues from live performance, they can't hire us to produce videos for them."

— Steve Ndone / Weeflag, Video producer

Industry (Total n)	Music (29)	Design (15)	Fashion (15)
Top job roles (n)	Music production and recording (19)	Marketing (12)	Marketing (11)
	Marketing (13)	Graphic design (9)	Production and manufacturing (11)
	Event production (12)	Printed design (6)	Textiles (9)

Figure 1. Top three job roles in the creative industries

The Impact of the Pandemic on the Creative Economy

- The general number of hours lost was drastic, as the percentage of the sample working full time decreased from 62% in 2019 to 21% in 2020 (Figure 2). Freelancers reported losing proportionally less income than business owners.
- Direct cash assistance (grants, subsidy) was the most important form of support received by the creative community. Some received job training or mutual aid.
- Almost 75% of the people surveyed report that combined working income and aid received do not meet pre-pandemic standards of living. However, the level of optimism in the city is very high compared to other cities.



"When we reopened our business, we decided to focus on the local clientele. The pandemic allowed us to come closer to the Senegalese and African market. It allowed us to develop our own economy."

— Marie Madeleine Diouf / Nunu, Fashion designer

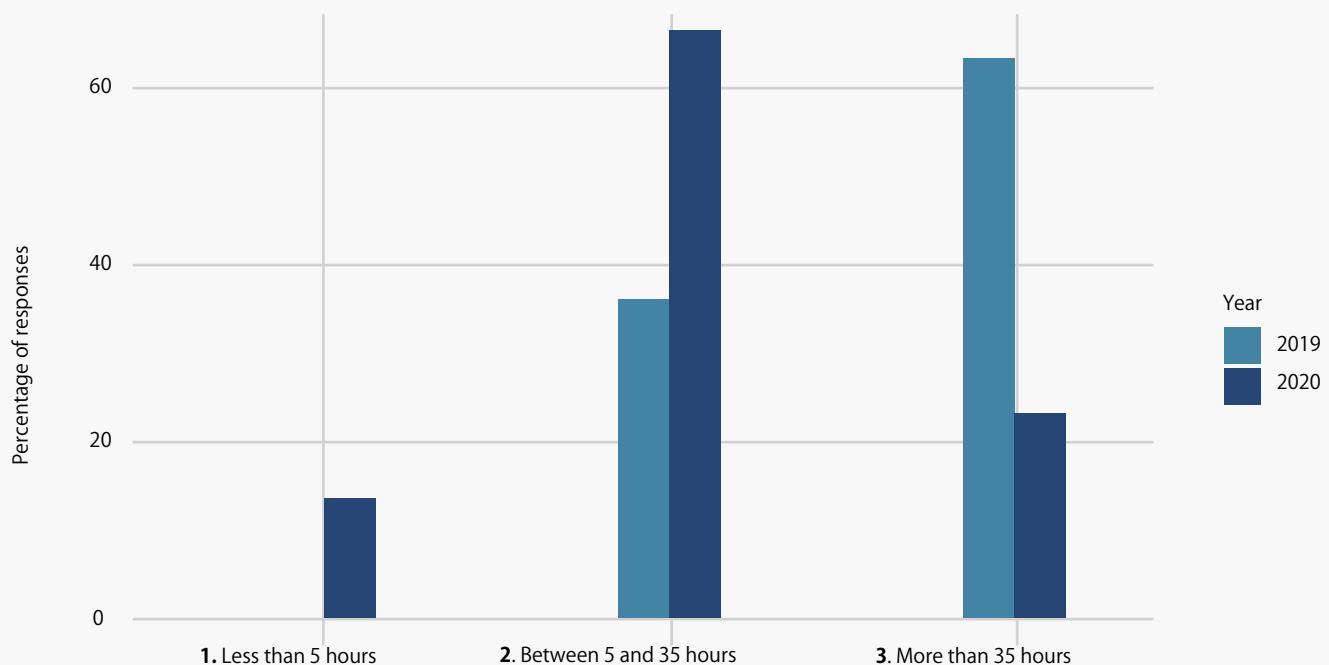


Figure 2. Hours per week in creative employment, 2019-2020. n=48

CREATIVE SPACES

Annotated Map

- The top three creative areas in Dakar are Ouakam, Médina, and Plateau. Ouakam seems to be a creative cluster for all sectors, but of particular importance for Music, with Plateau of significant relevance for Fashion and Marmoz-Sacré-Coeur of significant relevance for Design. (Figure 3).
- Subjects reported that venues, workshops and studios are the most important creative spaces in Dakar, followed by public spaces such as squares and streets.
- The change in the work environment has had severe effects. More than half of the creative community reported to be unable to find the right type of space to remain productive during Covid, and 82% reported that digital tools became more important since March 2020, the highest shifts across cities.



“Very quickly our saving funds dried out and we couldn’t pay our collaborators. People had to change jobs. It’s been very dramatic for our industry...We tried to go digital, but the event industry is all about meeting people and a sense of community that you can’t recreate fully online.”

— Don Cortega, DJ

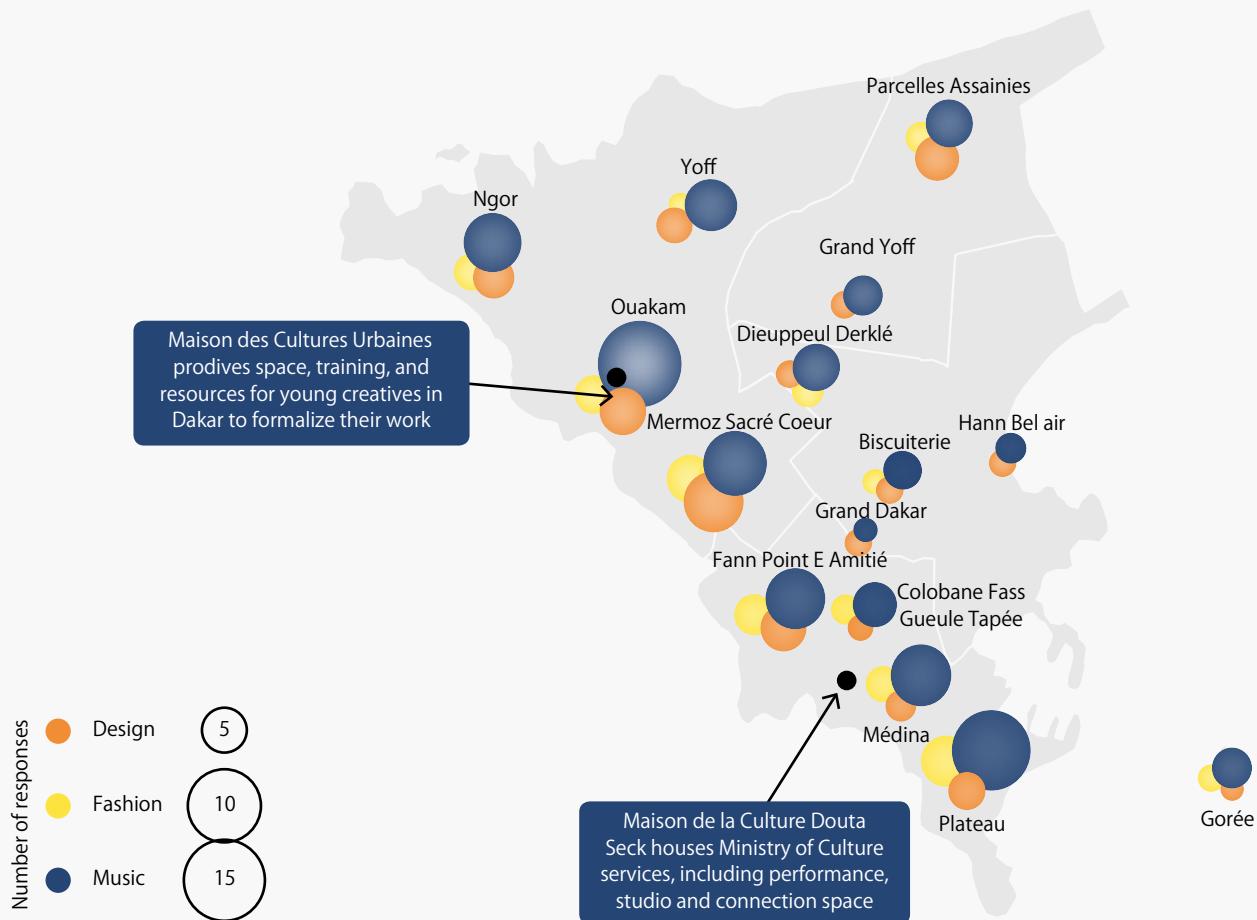


Figure 3. The CCI map of Dakar.

DRIVERS FOR DEVELOPMENT

Success Factors

- Affordable technology and available and affordable internet connection are top priorities in Dakar. In comparison with other cities, however, access to finance is of particular importance (Figure 4).
- Access to key stakeholders (local officials, foreign organizations, professionals and local organizations) is the highest across cities surveyed. This is a significant finding. It may signal that Dakar has a high level of structural organizations sustaining the sector — this would be consistent with historical trends in state support for arts in Senegal. Such findings may explain the high rates of formalization of businesses, including for freelancers and self-employed.



"I used to give training to the local youth interested in beatmaking. But we couldn't find any location to give the training. I tried to transition online through whatsapp group, but the results weren't very positive...The virtual space wasn't adapted for our training. We lost the ability to foster interaction between beat makers and other artists who could have collaborated."

— *Sidy Talla, Beatmaker and producer*

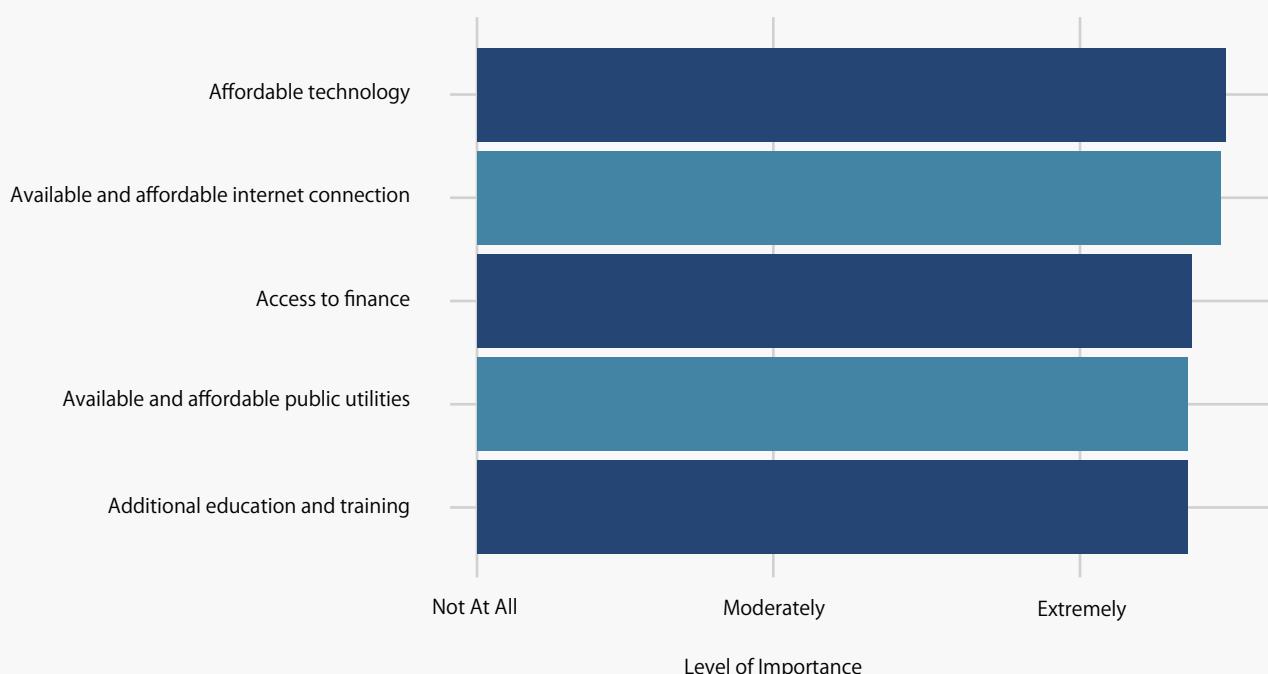


Figure 4. Top 5 responses to "How important are these goods, services and concepts to the success of your work?" n = 48.

Strengths

- Focus group participants reported a high level of professional flexibility across creative sectors in response to the pandemic and active adaptation to the rapidly changing market.
- Some CCI sectors were reported to have built advocacy structures during the pandemic to voice their common interests.
- The Senegal state has a history of funding artisans.

Weaknesses

- The sample reported a lack of affordable and accessible creative space for music.
- It is difficult for cultural enterprises to access financial institutions and understand financial options.
- The crafts sector suffers from a lack of access to high quality raw material on the local market.

SWOT ANALYSIS**Opportunities**

- The wide shift to working from home offers lasting opportunities to save resources which can be re-invested in other areas.
- The sample sees greater opportunities in the local market since the pandemic broke out through higher appreciation for local production among the wider public. Loyalty has developed towards local producers and local products. Focus group participants consider this to be particularly beneficial to the craft sector.
- Multidisciplinary exhibitions and events are recognized by the sample to provide impact opportunities across sectors and help improve the creative community's access to diverse ideas and skills.

Threats

- The live music industry's losses are dramatic and have affected the whole music sector's ecosystem.
- Live music sponsorships have decreased to nearly zero through the pandemic.
- Government taxation and import policies hinder the local production of textiles and other goods.
- [Personal] savings of CCI professionals are reported to have been used up.



© Jean-Baptiste Joire 2014

The picture was taken in Dakar's Médina district during a march organized by the association "Les petites pierres" to highlight the need for bringing cultural vibrancy to working-class neighborhoods.



"In Senegal I have seen a burst of creativity from the youth who brought a profusion of solutions to the situation. Some designed fountains, others created soap dispensers."

— Bibi Seck, Designer



SOUTH AFRICA | CAPE TOWN & JOHANNESBURG

Despite (sometimes fitful) government aid, both cities seem to be experiencing a momentary depression in spirits. Cape Town, a city with a strong tradition of live music, has been badly hit, with 63% of business owners reporting that earnings and income in 2020 are less than 25%, compared to 2019. Whilst Johannesburg was less severely impacted than its neighbor and was able to maintain a certain level of productivity, there is only qualified optimism for the future. Will the government understand the enormous potential of the creative sector? There is an open fear that both cities' collective creative communities are not taken wholly seriously.

Uncertainty seems to be the key emotion. This may have something to do with the respondents themselves, who, in both cities, were on the whole male, well educated and somewhat older. An admission that creative Skill Sets were often acquired outside of formal education and training does hint at a lack of resources and knowledge at state level. The concerns also hinted at a wish for consolidation and stability, with available and affordable internet connection and technology leading the wants list, and healthcare and welfare, better public utilities and physical security following closely behind.

Like many cities, the loss of performance spaces in the events sector has been severely debilitating for both Johannesburg and Cape Town, whether these events be music gigs or wine festivals. But traditional resilience and adaptability and a new focus on online can be the key drivers to a bounce back. Thabo Rasenyallo: "I grew up in poverty, so I know what a pandemic is. When I was 8, I was old enough to know what apartheid was but not to understand the impact. So to experience a pandemic of this nature in my mid-30s didn't necessarily affect me in [terms of] feeling hopeless. Historically as black South Africans, we have been very agile and able to execute even before understanding the business model."

Still; the shift online has reinforced an awareness amongst those in the creative sector that a levelling up in terms of access to resources and opportunities, on a countrywide scale is key to long term success. The "two worlds" of the Townships and the Inner City of Cape Town are still far apart. Amira Shariff also touched on the poverty gap when speaking of the future of creative life in Johannesburg: "Through experiences of connection you form identity. And not all people in South Africa have access to such high levels of technology. We are coming from such a Middle Class

experience; many don't have iPhones, Instagram, or Wifi. These are things we have to keep in mind as we creative industries going forward."



"We can't do things the way we used to do them, we can't give people platforms the same way we used to, we need to think of ways to restructure our narrative as creatives and create a new dialogue of our role. What direction do we go to now? What's next?"

— Amira Shariff, Promoter, cultural creator and curator

FACT SHEET:

Economy

- According to the World Bank, South Africa is an Upper Middle Income country with a Gross National Income per capita of \$12,530.¹
- The contraction caused by the pandemic prompted the South African government to borrow money from international markets and organizations to invest in a post-pandemic plan focussed on job creation in 2021.
- The International Labour Organization estimates that 28.7%² of the total labour force is unemployed. 16.3% of workers are self-employed.³ Unemployment for those with advanced education is at 13.6%, although unemployment for those with basic education is higher, at 35.0%.⁴
- The poverty headcount ratio at \$1.90 (2011 PPP) a day was 18.7% of the total population in 2014, the last year for which data is available. However, data using national poverty lines highlights that 55.5% of the total population lives in poverty.⁵
- South Africa remains also one of the most unequal countries in the world, where the bottom 40% shares 4.1% of the national income⁶ while the share of Top 0.1% in South Africa accounts for 29.8%. This is a good indicator to measure the UN Sustainable Development Goal 10.1.⁷

Business Environment

- South Africa is a country with a good business environment and infrastructure, especially in comparison with regional peers. South Africa ranks 84 out of 190 countries in the World Bank Ease of Doing Business Report, scoring above the regional average for starting a business.⁸

- South Africa has unequal provision of services, especially in areas such as adequate housing and water, sanitation and hygiene. Nearly 8% of the people living in cities do not have access to electricity.⁹
- The proportion of people aged 15+ with an account at a financial institution or with a mobile-money-service provider is at a staggering 69.21%. Internet penetration, however, is low at 56.16%.¹⁰

Creative Industries¹¹

- South Africa's creative economy is growing and has a strong service industry that represents an important hub for the African continent, with 67% of exports in the African market in 2014. Another important market is the United States.
- The most important sector is Design with goods such as interior design, jewellery and fashion generating \$315 million in exports. Other important sectors are publishing, art crafts. A strong local film and television industry is also developing. However, with \$1.8 billion imports, South Africa has a trade deficit of \$1.2 billion, with the UK, the US and Germany the top 3 import countries.
- Before the pandemic, South Africa's music revenue was estimated to be growing at 4.4% annually, with a projected revenue of \$178 million in 2020, sustained by growth in streaming revenue and digital technologies.¹²
- The South African Department of Sport, Art and Culture was able to survey creative workers and provided targeted relief during 2020 to account for lost live event revenue. These relief funds totalled \$8.4 million. Internet access and language barriers were obstacles to many reaching the funding.¹³

¹. GNI per capita, PPP (current international \$); World Bank, 2019 Prospects, 2018.

². ILO, 2020.

³. ILO, 2019.

⁴. Ibid.

⁵. World Bank, 2014.

⁶. World Inequality Database, 2019.

⁷. "By 2030, progressively achieve and sustain income growth of the bottom 40 percent of the population at a rate higher than the

national average".

⁸. World Bank Ease of Doing Business Report, 2019.

⁹. World Bank, 2018.

¹⁰. International Telecommunication Union World Telecommunication, 2019.

¹¹. UNCTAD, 2014.

¹². Heva Fund, 2018.

¹³. Global Nighttime Recovery Plan, Chapter 4, 2021.



SOUTH AFRICA | CAPE TOWN

KEY FINDINGS

- The sample in Cape Town is well-educated and has a great deal of experience working in the creative economy.
- Although many report participating in multiple creative disciplines, more than 75% have some role in the music industry. Many professionals in marketing and management report working across sectors.
- The level of formalization of the creative community is among the highest across all samples.
- Cape Town has seen the largest negative impact of the pandemic, with 63% of business owners reporting that earnings and income in 2020 are less than 25% compared to 2019. 81% of the sample reports that standards of living were not maintained despite support coming from different forms of relief. Full time work has diminished severely.
- South Africa was able to provide some forms of relief to unemployed creative workers that other countries did not.
- The music industry has had the largest financial losses, in part because it heavily relied on the availability of performance and public spaces.



"There seems to be a lack of transparency on how things get awarded funds by Government or NGOs — if you know someone who can get it to the right person to read your proposal it becomes easier — nepotism"

— *Inyambo, Studio manager and music producer*

FACT SHEET:

Overview

- Cape Town is the legislative capital of South Africa. The UN estimates that there are 4 million people living in Cape Town and 57.78 million people living in South Africa.¹
- According to UN-Habitat, South Africa's urbanized population is projected to increase from 67% today to 80% by 2050.
- The lasting effects of apartheid are related to growing inadequacy of housing and high levels of inequalities.²
- South Africa has a very young population, with 29.0% of the population is under 14. Enrolment in primary and secondary school is nearly 100%.

¹. UN Population Division's World Urbanization Prospects, 2018.

². UN-Habitat, 2018.



"Covid-19 showed us that a lot of creative industries had a lack of support even pre-Covid-19, and many of us shrug that away and put the show on."

— *Simon Wilson, Freelance designer*

DATA ANALYSIS

The Creative Community

- The majority of the 86-person sample was in the age group 35-49. Overall, the sample is male dominated. 31% of the sample was female. The sample is also highly educated, with more than 64% having a university degree or graduate education.
- The majority of the creative community sample in Cape Town works in Music—with significant overlap between industries, especially in marketing and management roles, where people report doing work across multiple disciplines. (Figure 1)
- 38% of the survey sample reported being self-taught and only 25% gaining skills from schools. Considering the high level of education of the sample, this may suggest a mismatch in the skills on offer at formal institutions.

- 30% reported owning their own business, with an additional 37% self-employed or working as freelancers. 14% of the sample is currently not working.
- 65% of the business-owning sample operates formally with their business registered.



“Loads of small boutiques closed down, and the fashion industry really took a hit, we have zero support from the government, if i hadn’t had help from my family i would have been on the streets”

— *Chrisna De Bruyn, Stylist and magazine producer*

Industry (Total n)	Music (65)	Design (33)	Fashion (23)
Top job roles (n)	Marketing (49)	Marketing (31)	Marketing (25)
	Festivals (43)	Management (26)	Management (20)
	Event production (42)	Film, TV, Video (21)	Festivals (14)

Figure 1. Top three job roles in the creative industries

The Impact of the Pandemic on the Creative Economy

- Full-time creative work diminished severely from 2019-2020. Large segments of full-time and part-time workers went to working under 5 hours per week in 2020. Unemployment or near-unemployment is now more common in our sample than full-time work (Figure 2).
- The sample registers high levels of uncertainty—52% don't express optimism about the future of their work.
- 63% of creative business owners report earning less than 25% of their 2019 revenue in 2020. Freelancers and the self employed were also badly hit, with the majority reporting income in 2020 to be less than 25% of 2019 levels.
- 81% of the sample reports that standards of living dropped, among the highest levels across samples.
- Mutual aid and family support are the most common forms of support, followed by direct cash payments and unemployment payments, the latter being a significant form of support only in South Africa.

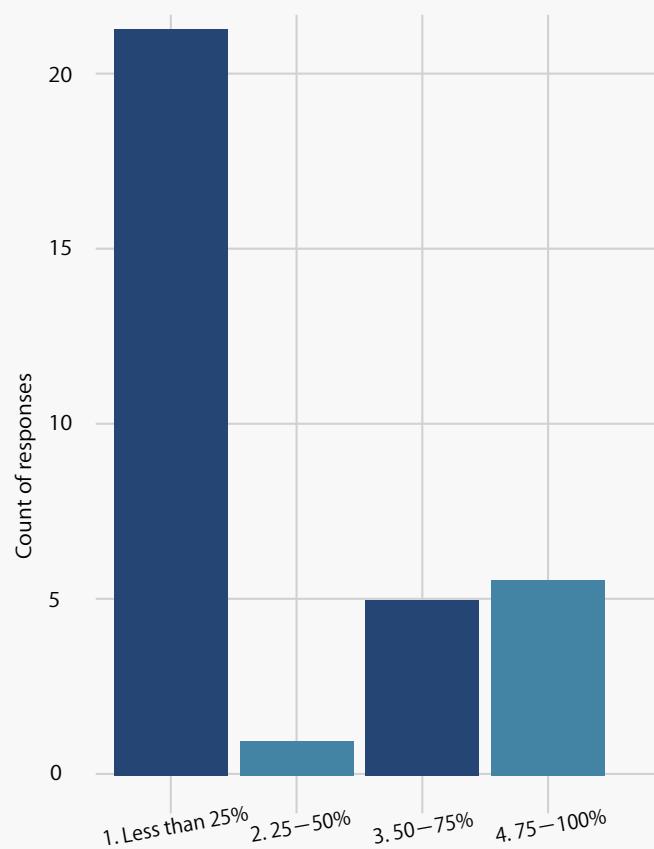


Figure 3. Business owners' 2020 gross revenue as a percentage of 2019 gross revenue. N = 33

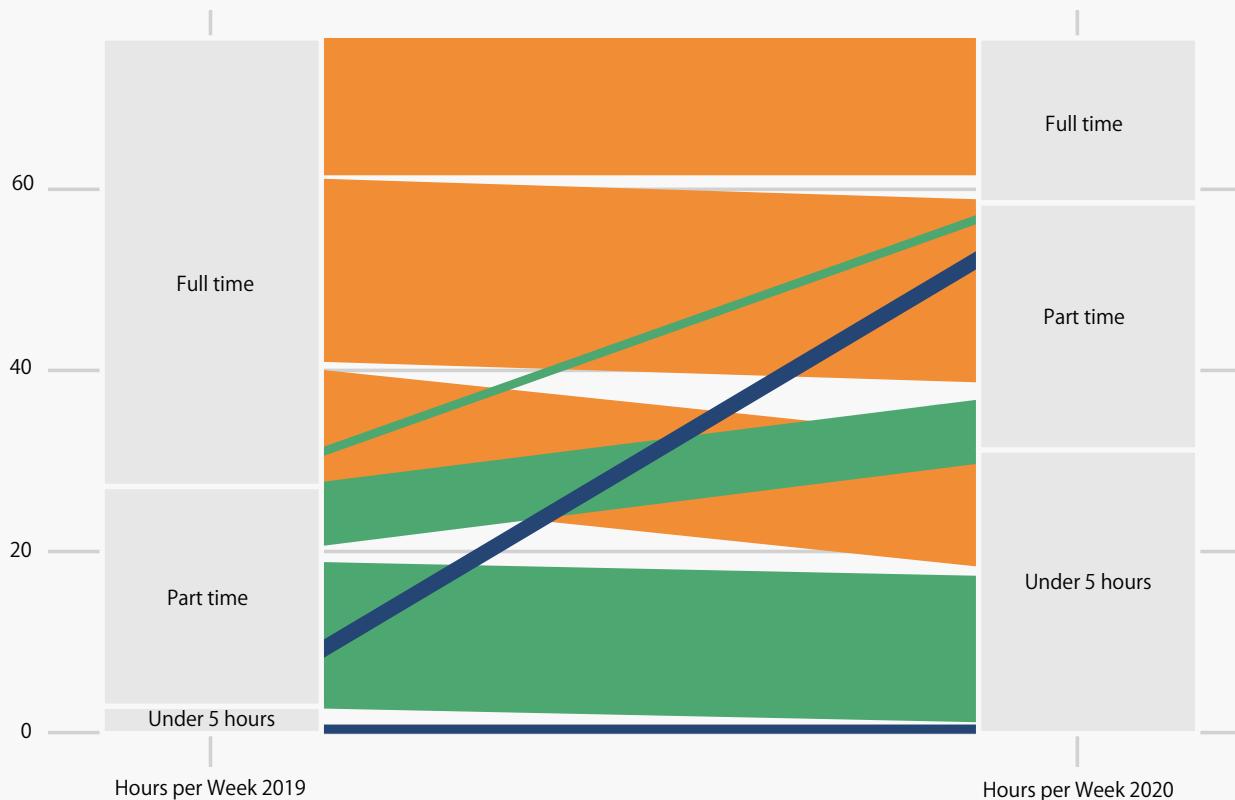


Figure 2. Change in work status from 2019-2020. Full time denotes 35 or more hours per week. N = 76.

CREATIVE SPACES

Annotated Map

- The three areas in which most subjects reported doing creative work are Southern, Western, and Khayelitsha, with the boundary between Southern and Western representing a main hub (Figure 4). However, the CBD, which is not a formal administrative district, is the most commonly referenced hub area in the city.
- A variety of types of spaces are important to CCIs in Cape Town, although performing venues are the most important space, followed by workshops or studios and public space.
- 58% of the sample reported that productivity levels were not maintained. This may be due to the relative high number of people relying on performing venues.



"Chasing grant money is a whole job by itself. It requires a massive amount of time and resources and there's a widespread feeling that many grants are awarded to the same, established beneficiaries every year. We need to install much greater transparency and grants that specifically target non-established players and emerging creative sectors."

— Ivan Turanjanin, Culture curator

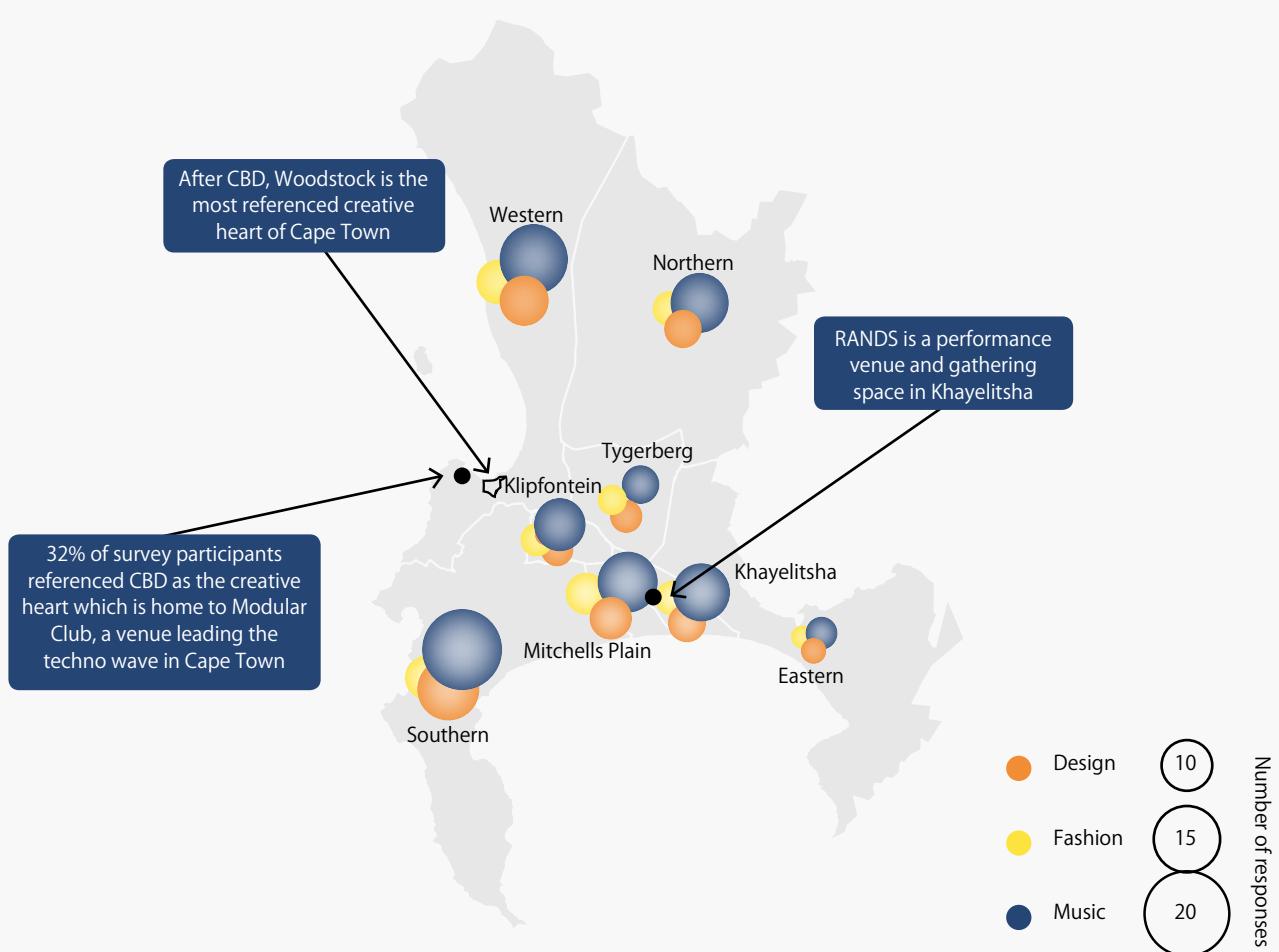


Figure 4. The CCI map of Cape Town.

DRIVERS FOR DEVELOPMENT

Success Factors

- Available and affordable internet connection and affordable technology are thought to be the most pressing needs, followed by healthcare and welfare, available and affordable public utilities and physical security. Physical Security seems to be an important aspect primarily for South African cities (Figure 5).
- Access to a wide range of stakeholders is limited compared to other cities, as the sample in Cape Town reports insufficient access to foreign organizations, local officials and local organizations, while enjoying a good deal of access to professional connections.



"Why isn't our government paying for free access to certain educational or creative outlets? We see now that even pre-Covid-19 we have been taken advantage of and now we can begin to make our own spaces and restructure."

— Simon Wilson, Freelance designer

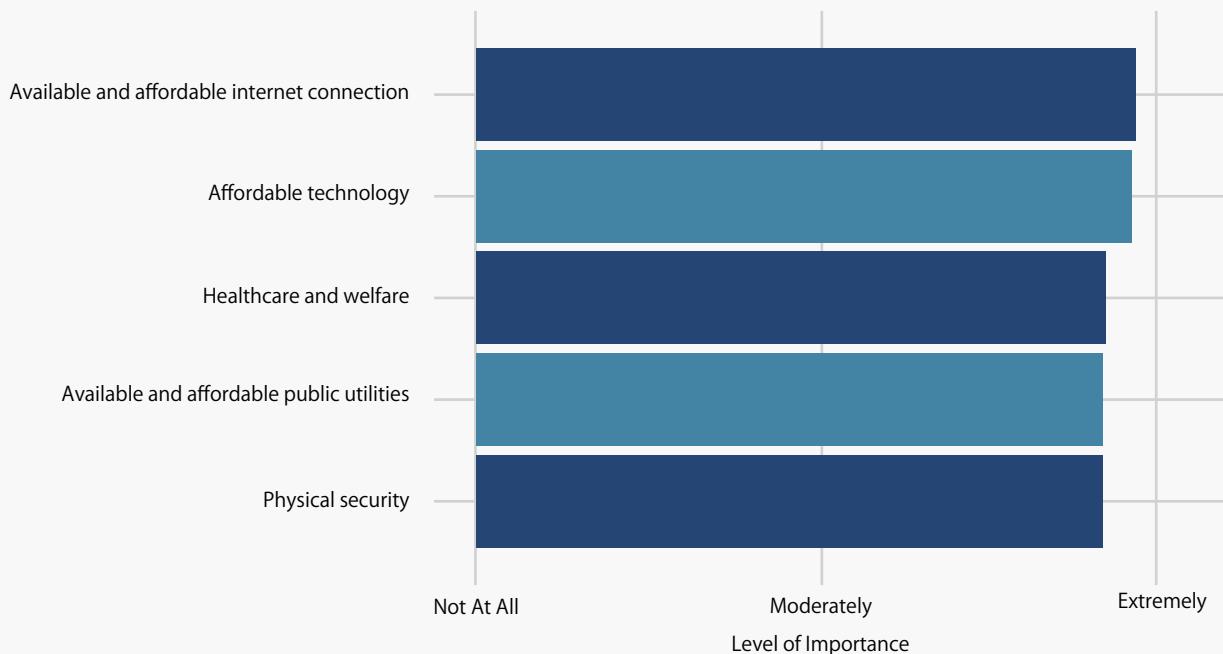


Figure 4. Top 5 responses to "How important are these goods, services and concepts to the success of your work?" n = 48.

Strengths

- The crisis helped townships and inner city to move closer together.
- The population is crisis-tested and agile to face challenges like the pandemic.
- Creatives identify with their region and are proud to label it with "Made in Cape Town".

Weaknesses

- Access to suitable funds is reported to be very limited for most areas of the CCI. Focus group participants reported grant programs to be complicated to apply for, intransparently awarded and bureaucratic to manage.
- The sample felt a lack of acknowledgement for the relevance of culture and entertainment among the wider public.
- High levels of social and economic inequality and unequal access to services and digital connectivity limit opportunities for post-pandemic recovery for many.

SWOT ANALYSIS

Opportunities

- Townships are increasingly recognized as creative hotspots. Educating creatives in townships about distributing and monetizing their art can unlock available potentials.
- International reputation and tourism are seen by creatives as opportunities for post-pandemic growth.
- The South African national government has employed targeted pandemic relief and research regarding creative sectors in an internationally notable way.
- The multi-disciplinary skill sets of creative professionals apparent in our survey data (e.g. in management and marketing) present opportunities for a well working interaction of disciplines and sectors.

Threats

- Levels of employment have dropped dangerously low in the cultural and creative industries.
- The sample reported the beginning of a brain drain. Young talents are leaving the country or the creative sector, switching professions.
- Focus group participants point to the absence of a public safety net for small businesses in the CCI.
- The burden of Covid-19 restrictions on the event industry in particular is expected to put the sector at risk long-term.



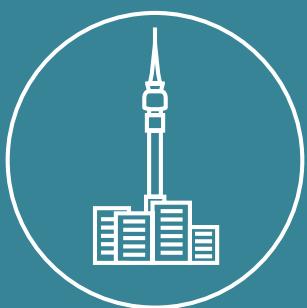
© Mik Motala Photography

DJ InviZable riding a customized bicycle soundsystem at *Open Streets* event on 28. October 2018 in Cape Town's Woodstock district. The event promoted non-motorized transport, safe spaces, and creativity.



“Lack of resources is a big factor on how to bring the two worlds together – the Townships and the Inner City – Cape Town is quite different than the rest of the country”

— Thabo Rasenyallo, Studio manager and DJ



SOUTH AFRICA | JOHANNESBURG

KEY FINDINGS

- The findings coming from Johannesburg are broadly in line with those in Cape Town—dominated by music industries, with lots of cross-sector professional work, and badly hit by the pandemic. Compared to the capital, however, the sample is more professionally diverse in composition.
- The impact of the pandemic was slightly less severe than in Cape Town, but levels of optimism about the future of creative work are mixed.
- Creative industries are widely dispersed throughout the city, whereas most other cities surveyed were highly centralized in one or two agglomerations.
- Johannesburg is unique when looking at the type of support received, where loans are the most popular forms of support after mutual aid and family support. Access to types of support varied by education level.
- 50% of the sample reported that productivity levels were maintained, which is higher than in Cape Town.

FACT SHEET:

Overview

- Johannesburg is the most populated city in South Africa. There are almost 6 million people living in Johannesburg with a metropolitan area of more than 10 million people, a large proportion of the 57.78 million living in South Africa.¹
- For more detailed statistics about South Africa and its economy and creative sectors, refer to the Cape Town case study 64.

¹. UN Population Division's World Urbanization Prospects, 2018.



“People don’t care about brands right now. They care about being helped. We need to find out how people are hurting, and give them something to help them in this time, and then you have their loyalty forever.”

— *Sharon Cooper, Music festival manager*

DATA ANALYSIS

The Creative Community

- The majority of the 90-persons sample was in the age group 35-49. Overall, the sample is male dominated. Only 32% of the sample was female.
- The sample is well educated, with 38% having a university degree, 24% from graduate school and 15% with secondary school degree.
- The majority of the creative community in Johannesburg works in music, while many with management and marketing skills work broadly across sectors (Figure 1).
- 33% of the survey sample reported being self-taught, 26% gaining skills from schools, 23% via formal and informal apprenticeships, and a significant proportion, 15% via online training.
- 13% of the sample is currently not working.
- 30% owns a business and 44% is self-employed or works as a freelancer.
- 67% of the sample operates formally with their business registered, in line with Cape Town.



“Design in township was relying on music and it’s basically not existing any more.”

— Luke Young, DJ, promoter and advertising agent

Industry (Total n)	Music (68)	Design (36)	Fashion (16) ²
Top job roles (n)	Management (53)	Management (36)	Management (16)
	Event production (41)	Marketing (29)	Marketing (16)
	Marketing (40)	Graphic Design (15)	Design (11)

Figure 1. Top three job roles in creative industries

²Figures include roles listed through cross-registration through multiple industries (e.g. many said they participate in both design and fashion industries, and indicate their primary jobs as including management and marketing in both fields)

The Impact of the Pandemic on the Creative Economy

- The sample in Johannesburg registers high levels of uncertainty - only 53% say they feel optimistic about the future of their work in the creative sector.
- Creative business owners in Johannesburg were not as impacted as in Cape Town, although half of the sample indicates that in 2020 earnings and income dropped below 25% compared to 2019. These businesses reported shedding most of their employees in 2020 (Figure 2). The majority of freelancers and self-employed were similarly badly hit.
- Many people have received aid during the pandemic. Access to aid is very unequal with regards to educational attainment. While many with university education have accessed loans, those with lower education were more likely to seek unemployment or mutual or family aid. (Figure 3)

- 70% of the sample reports that the money they've had in 2020 is not enough to maintain their previous standard of living.



"We had to take jobs for less rates. But when things pick back up, how do we get our rates back up?"

— Kavir Magan, Creative Consultant

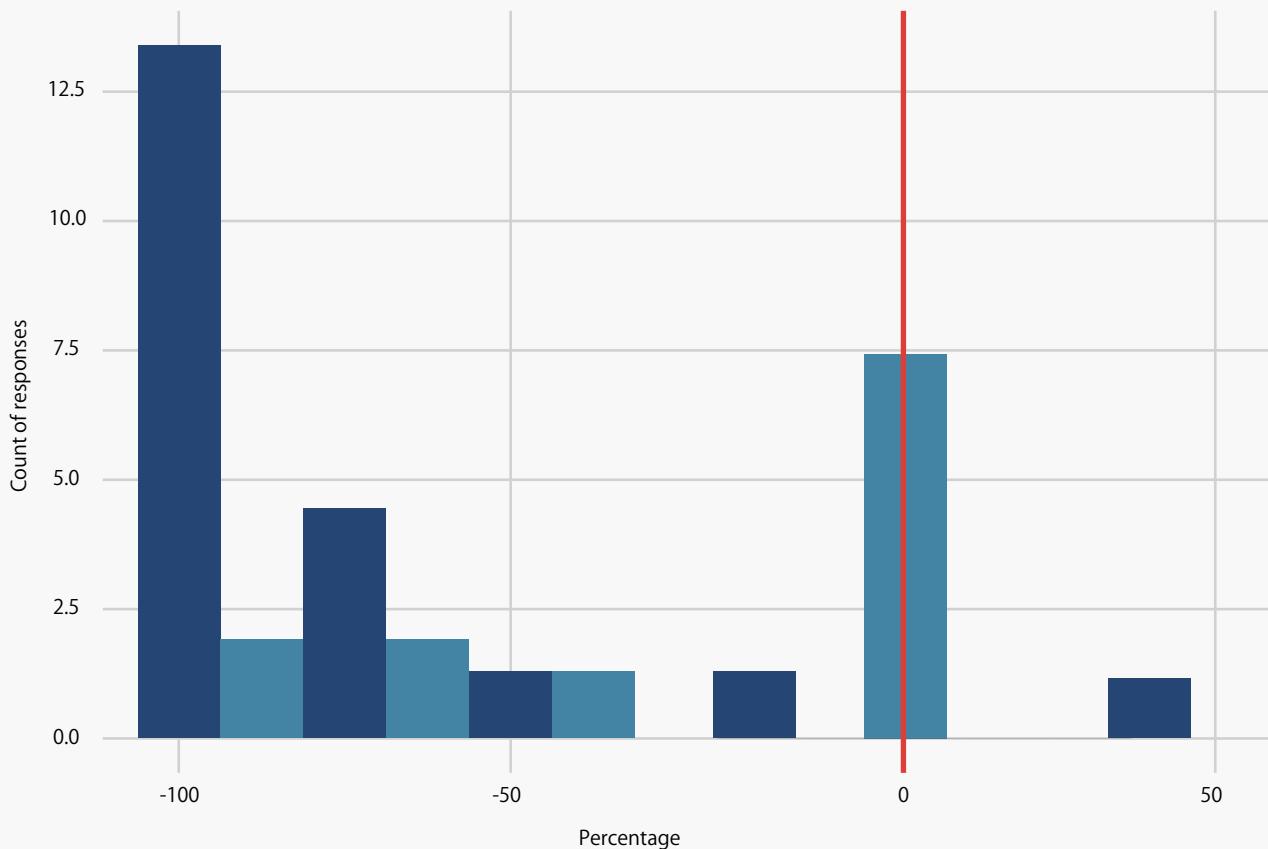


Figure 2. Number of employees reported by business owners in 2020 as a percentage of those they employed in 2019. N = 38.

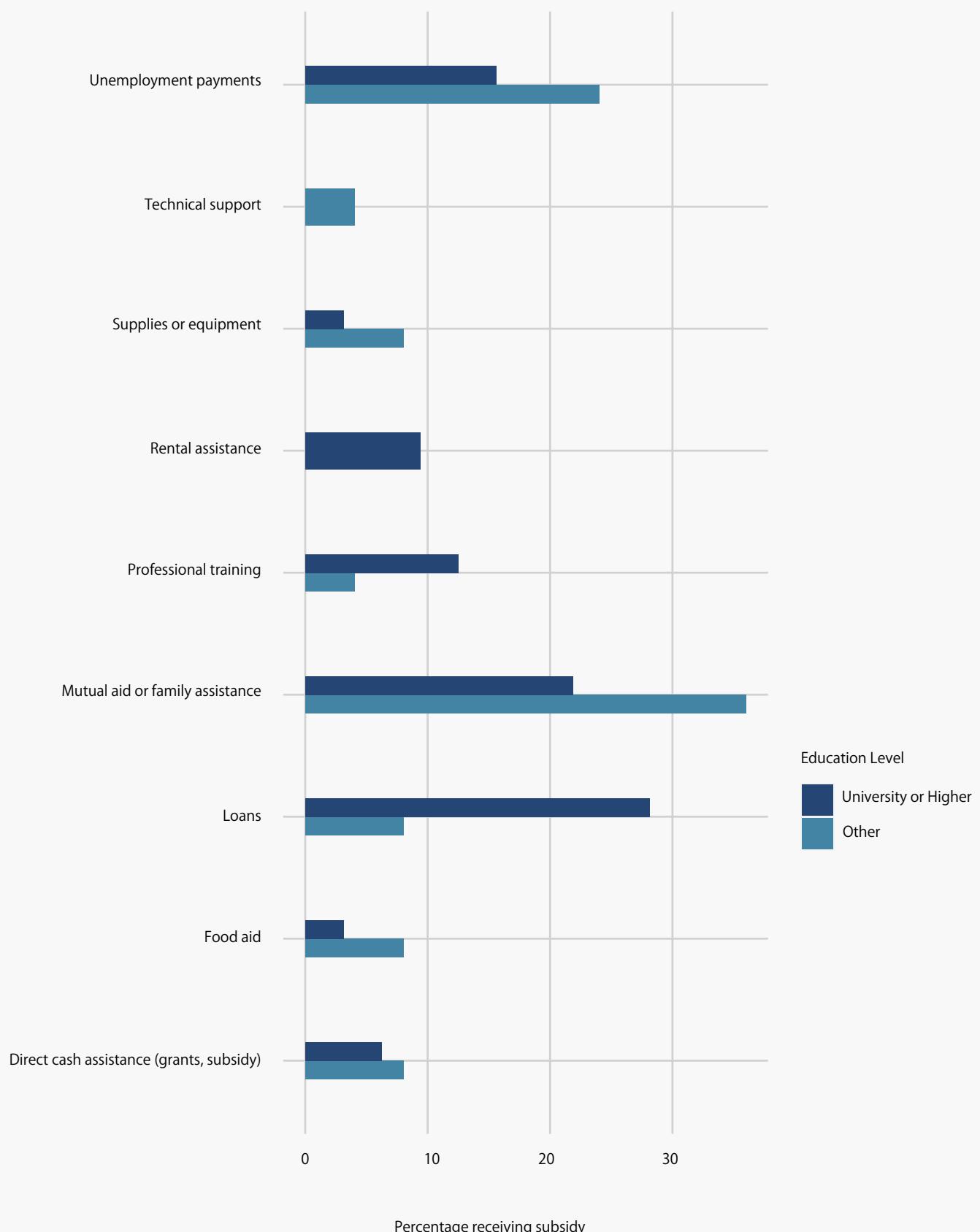


Figure 3. Forms of subsidy received by educational attainment. N = 80

CREATIVE SPACES

Annotated Map

- The top three creative regions in Johannesburg are Sandton, Braamfontein, and Rose Bank, with Newtown and Maboneng being the creative heart of the city (Figure 4).
- A wide range of spaces are important to CCIs in Johannesburg, but performing venues remain the most important creative space, followed by workshops or studios and public spaces, rankings in line with those in Cape Town.
- 50% of the sample reported that productivity levels were maintained, which is higher than in the capital.



“Collaborative spaces are needed to get access to new sectors. We need more diverse connections between different disciplines. Our ability to move beyond existing ideas is very limited.”

— *Nthabiseng Lechaba, Strategy consultant*

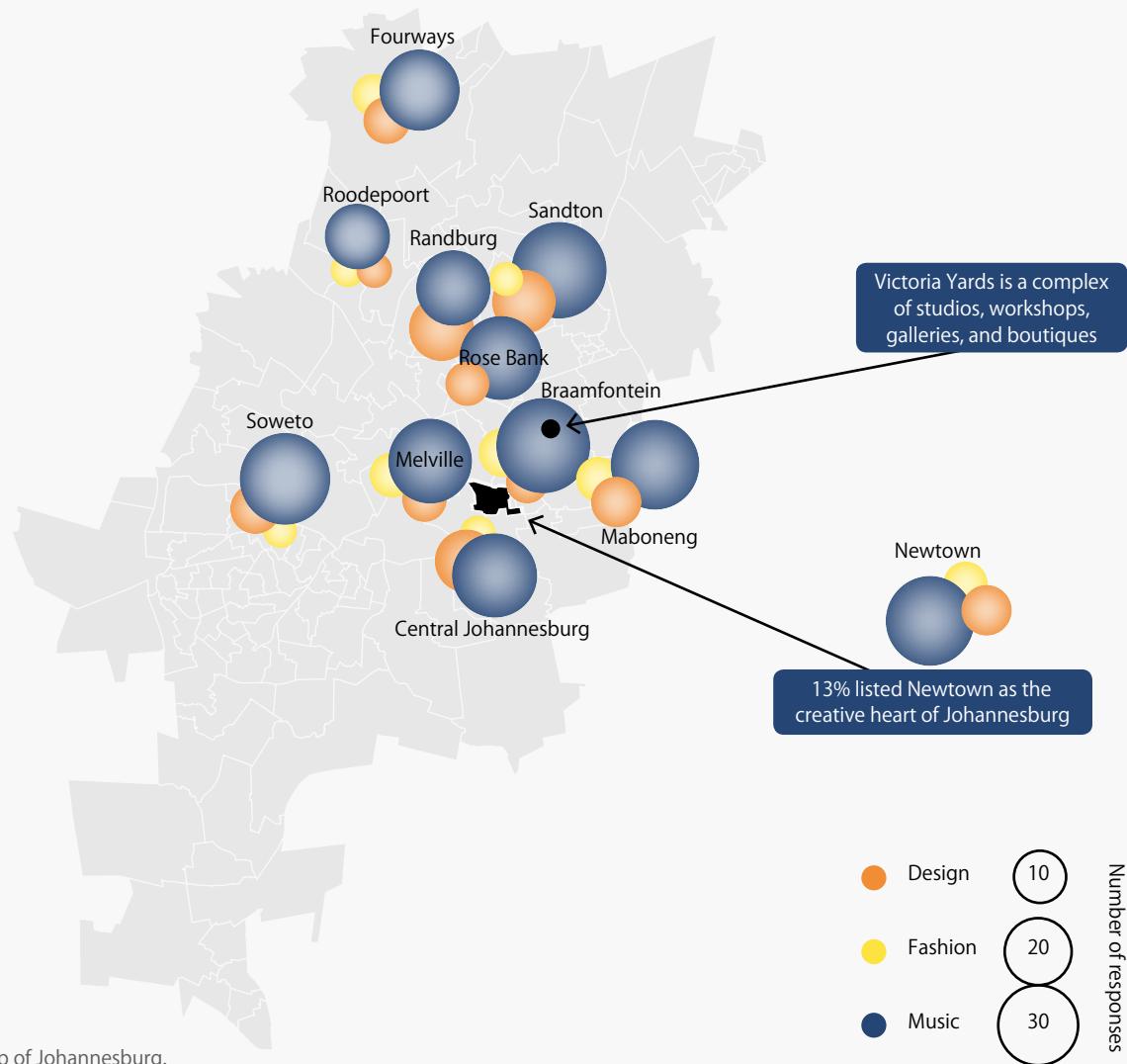


Figure 4. The CCI map of Johannesburg.

DRIVERS FOR DEVELOPMENT

Success Factors

- Available and affordable internet connection and affordable technology are thought to be the most pressing needs, followed by available and affordable public utilities, physical security, and healthcare and welfare. All results are broadly in line with those of Cape Town (Figure 5).
- Access to a wide range of stakeholders is limited compared to other cities, as the sample in Johannesburg reports that it does not have sufficient access to foreign organizations, local officials and local organizations.



"Through experiences of connection you form identity...and not all people in South Africa have access to high levels of technology. They don't have iPhones, Instagram, or Wifi...there are things we have to keep in mind as creative industries going forward."

— Amira Shariff, Promoter, cultural creator and curator

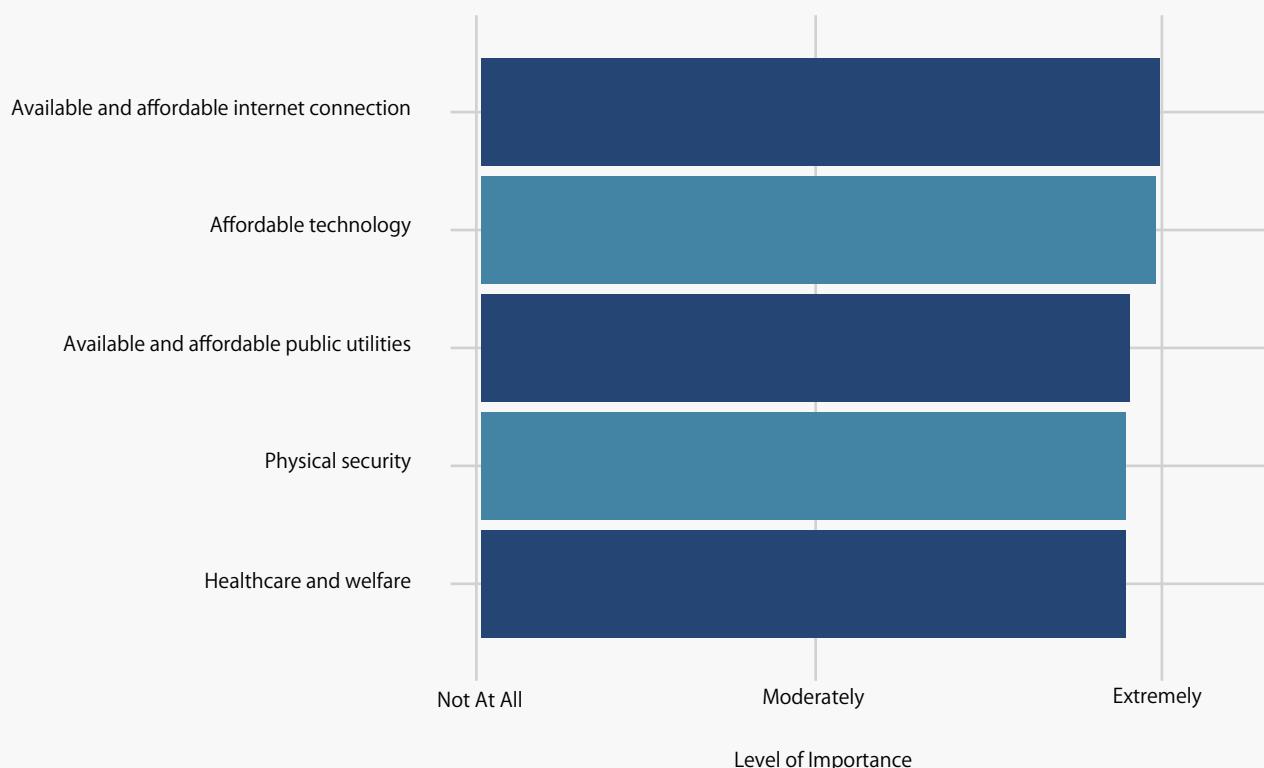


Figure 5. Top 5 responses to "How important are these goods, services and concepts to the success of your work?" n = 90

Strengths

- Focus group participants reported strong interdisciplinary collaboration between the CCI and the IT sector. There is an advanced awareness for integrating digital technology into creative work.
- Many participants of the focus group stated that flexibility paid off as they adjusted their jobs and became more successful during the pandemic than they had been before.
- The sample reported positive examples of accessing funds by international organizations as well as good collaboration with the Department of Trade and Industry for international exchange programs.

Weaknesses

- Large events / festivals are not able to monetize digitally and, in many cases, had to cancel completely.
- The most relevant training needs as voiced by focus group participants lie in the protection of intellectual property, the protection, marketing and development of brands, and building online business presences.
- Due to heavy Covid-19 contact restrictions, peer-to-peer learning has been very limited during pandemic and not satisfactorily counterbalanced by digital formats.
- Focus group participants point to the problem of limited access to technology and stable internet connection in some regions.
- Echoing critique by focus group participants from Cape Town, grant programs are reported to be intransparent and hardly accessible.
- The sample highlighted the problem of "gatekeepers" hindering access to funds, well-reputed events or creative space and the need for greater transparency and more inclusive communities.

SWOT ANALYSIS

Opportunities

- Focus group participants see the greatest chance for short term relief in fast returning tourism.
- Empty retail spaces may be appropriated for temporary pop up stores for designers and fashion creators to use the given conditions as an opportunity for testing new ideas and concepts.
- Focus group participants point to locally available competence in fundraising (e.g. Bubblegum Club) that can be partnered up with to design successful training programs in this area.
- The South African national government has employed targeted pandemic relief and research regarding creative sectors in an internationally notable way.

Threats

- Focus group participants express the need for greater awareness and appreciation among the government for the creative ecosystem.
- The sample sees a downward shift from organized to informal structures, accompanied by problems of efficacy, transparency and inclusiveness.
- By the closure of festivals and markets due to Covid-19 restrictions and their ongoing economic endangerment, the maker scene has lost extremely relevant sales and networking platforms.
- Existing social and economic inequalities will make the post-pandemic recovery more difficult if not addressed by targeted interventions.



© Craig Owen Photography

This image is from RoseBank (a Johannesburg suburb) Keyes Art Mile Building . The show is part of the Independent Designers and Designers Fashion Market.



"We are entering a new Renaissance period where the old systems are not working the same anymore and we need to navigate the new ways."

— Amira Shariff, Promoter, cultural creator and curator

CROSS-COUNTRY INSIGHTS

CROSS-COUNTRY INSIGHTS:

There were several general findings from our survey which look at creative sectors and creative workers as a group. This approach allows for consideration of broad challenges and programming opportunities.

- Access to affordable internet and affordable digital technologies is the greatest need across all cities and industries. Digital tools and skills have become generally more important to creative work — a trend that was accelerated by the pandemic (Figure 1).
- Freelancers, self-employed people and small business owners made up the majority of the survey sample. Subjects in the survey reported performing many different business roles, frequently 3 or more.
- The largest sub-population was from the music industry, followed by Design and Fashion.
- Across sectors and cities, financial losses were extreme.
- Full-time employment dropped by two thirds in some cities, and only a small minority reported maintaining steady income or being able to maintain their standard of living from before Covid-19 (Figure 2).
- The large majority of business owners shed some, or all of their staff in 2020 (Figure 3).
- The music sector was the most deeply damaged by the pandemic and relied the most on spaces for assembly prior to Covid-19.
- The loss of physical spaces and markets has a likely relationship to the deep financial and social problems we observed in the creative sectors. Most cities have a few agglomerations where creatives of all kinds clustered in pre-Covid-19 times. These areas are the place where the economic inputs to the creative sectors often merge, where ideas are generated, social experiences are shared, and the consumption of culture takes place.
- The survey sample was far better educated than country national averages, but high levels of self-education in the creative work indicates that the skills being learned in schools and universities were not sufficient for success in creative sectors. Some indicated that there is social pressure to pursue conventional education in non-CCI disciplines before pivoting to a creative career.
- Relief measures varied by country, but it seems likely that higher levels of education had some relationship with the ability to access more complex forms of relief.
- Creatives generally feel a lack of access to local officials

and NGOs (Figure 4).

- Levels of optimism about the future were generally high, but were lower in cities with problems of instability, and lower in the music industry, where economic impacts have been severe. While flexible forms of aid can be of great advantage under such volatile circumstances, there is a very deep yearning for stability, longer-term visions, and personal perspectives and experience; all of which should be considered in content and formats of aid programs. Ad-hoc interventions alone will not satisfy these needs and may even be confronted with resistance.
- Reports of exacerbated mental health challenges among CCI communities appeared in our focus groups. Mental health awareness is likely to become a relevant skill for those who design activities in support of CCI professionals.

CROSS-COUNTRY INSIGHTS

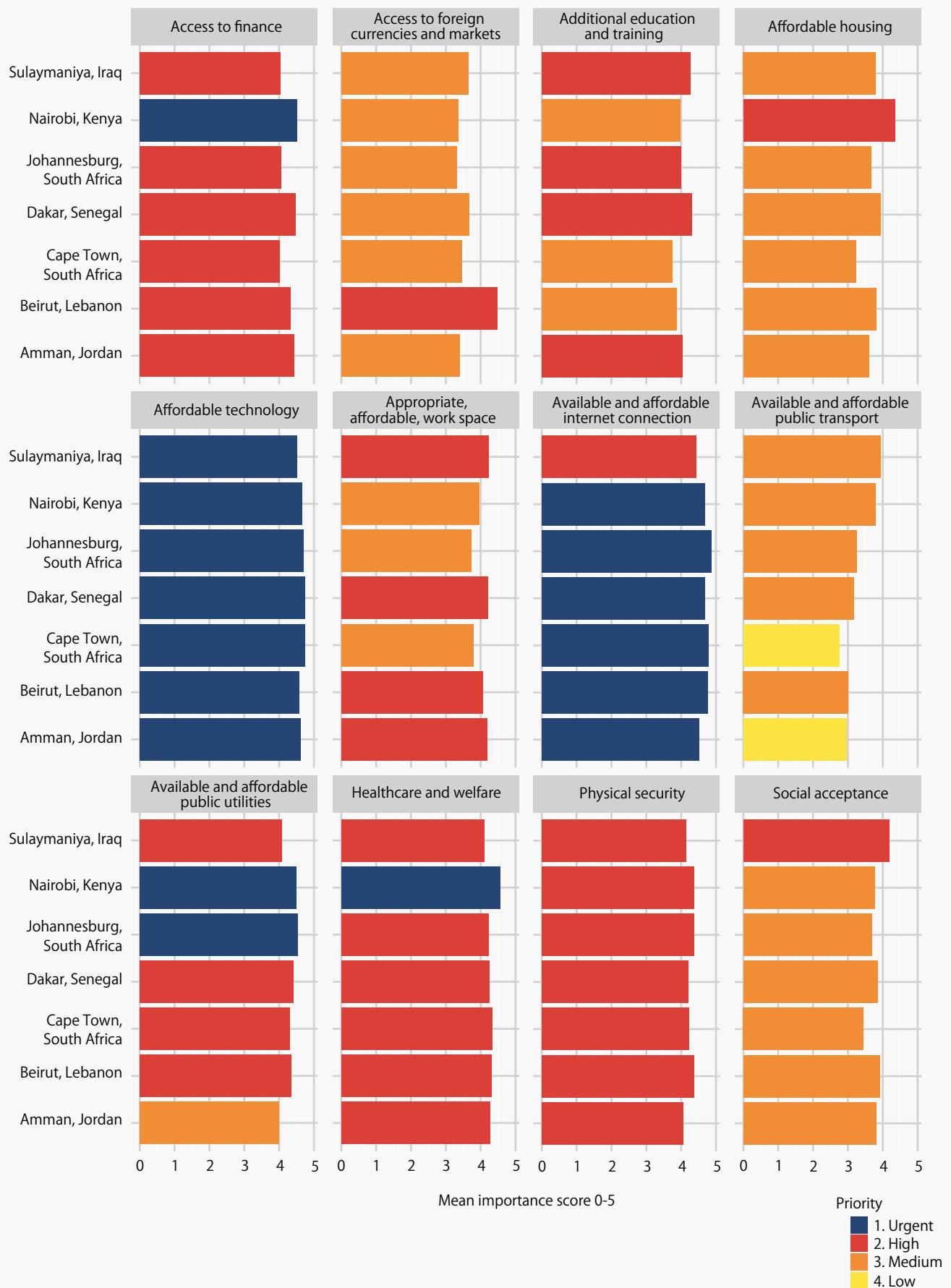


Figure 1. "How important are these goods, services and concepts to the success of your work?" on a five-point scale of "Not at all important" (zero) to "Extremely important" (5). N is variable by city.

CROSS-COUNTRY INSIGHTS

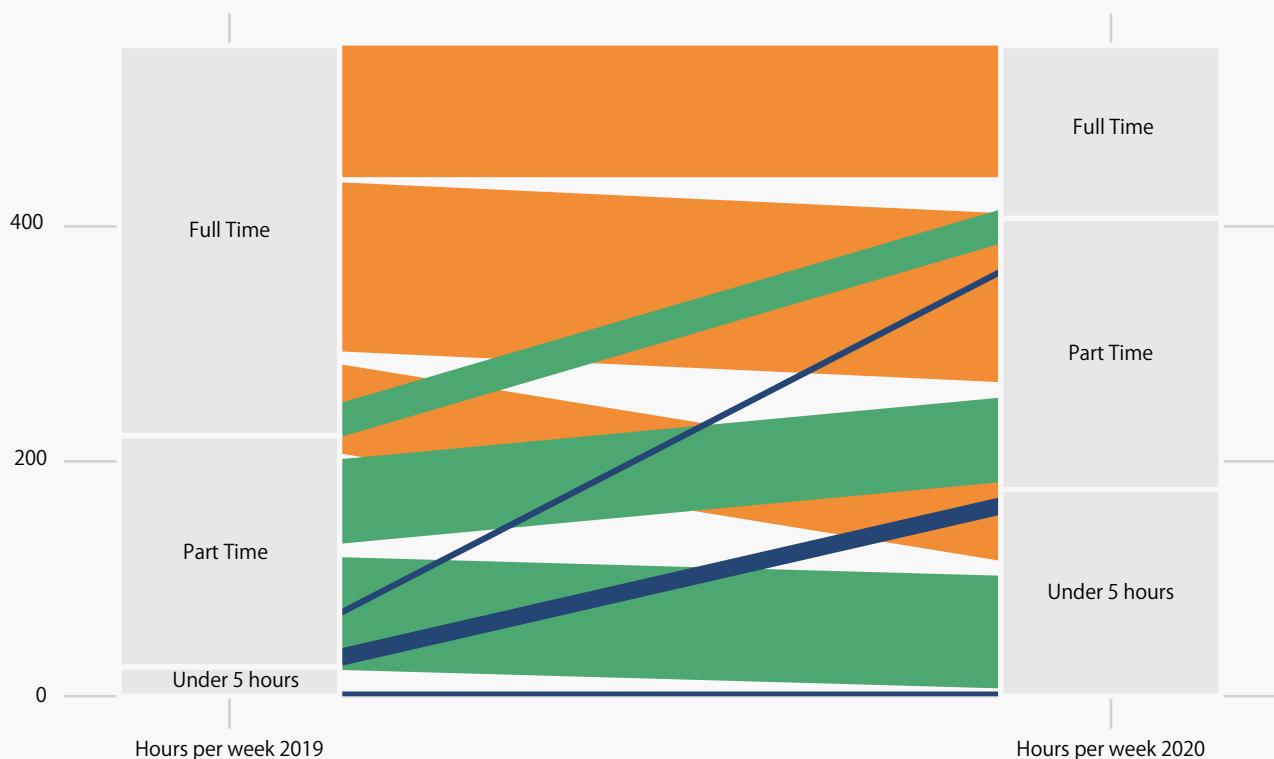


Figure 2. Change in work status from 2019-2020. Full time denotes 35 or more hours per week. N = 552.

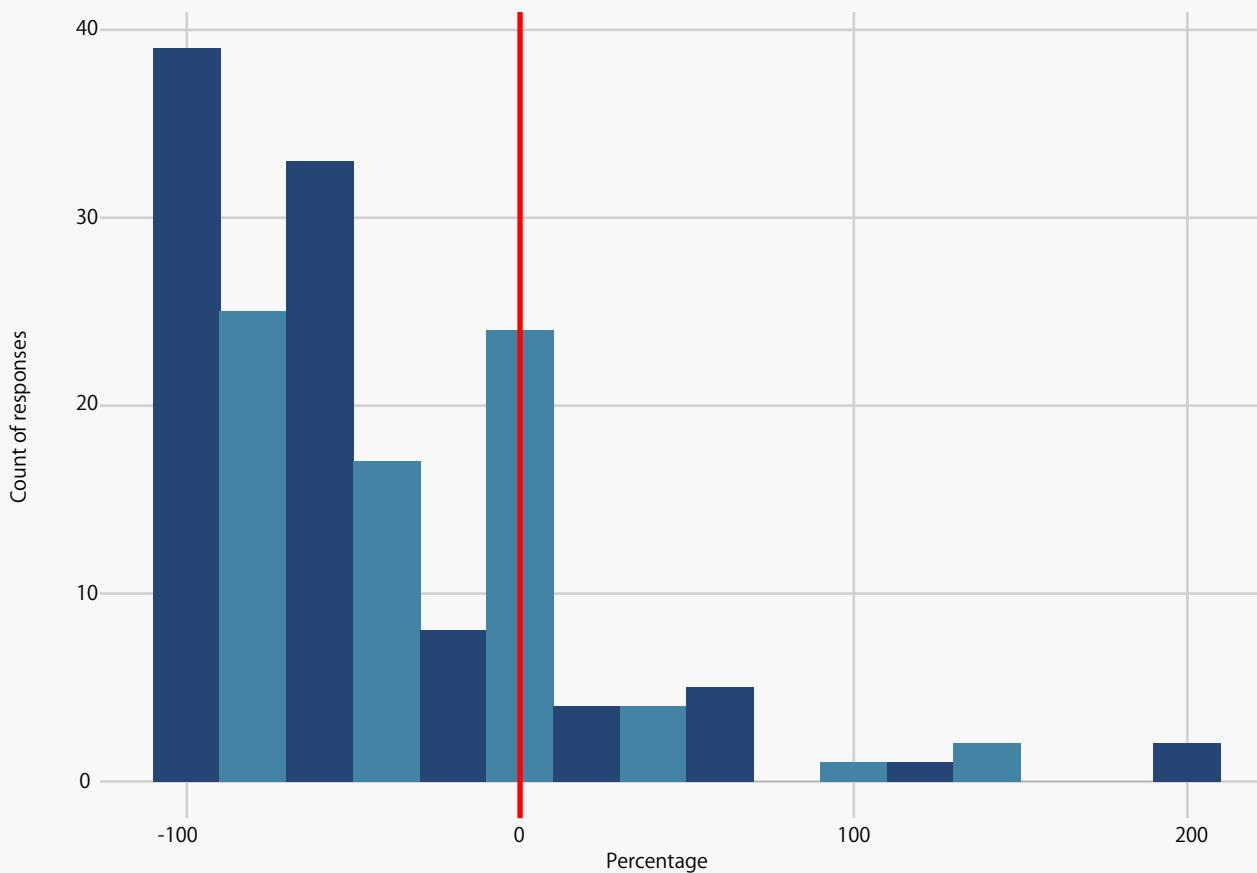


Figure 3. Number of employees reported by business owners in 2020 as a percentage of those they reported employing in 2019. The red line represents no change in employment. N = 215

CROSS-COUNTRY INSIGHTS

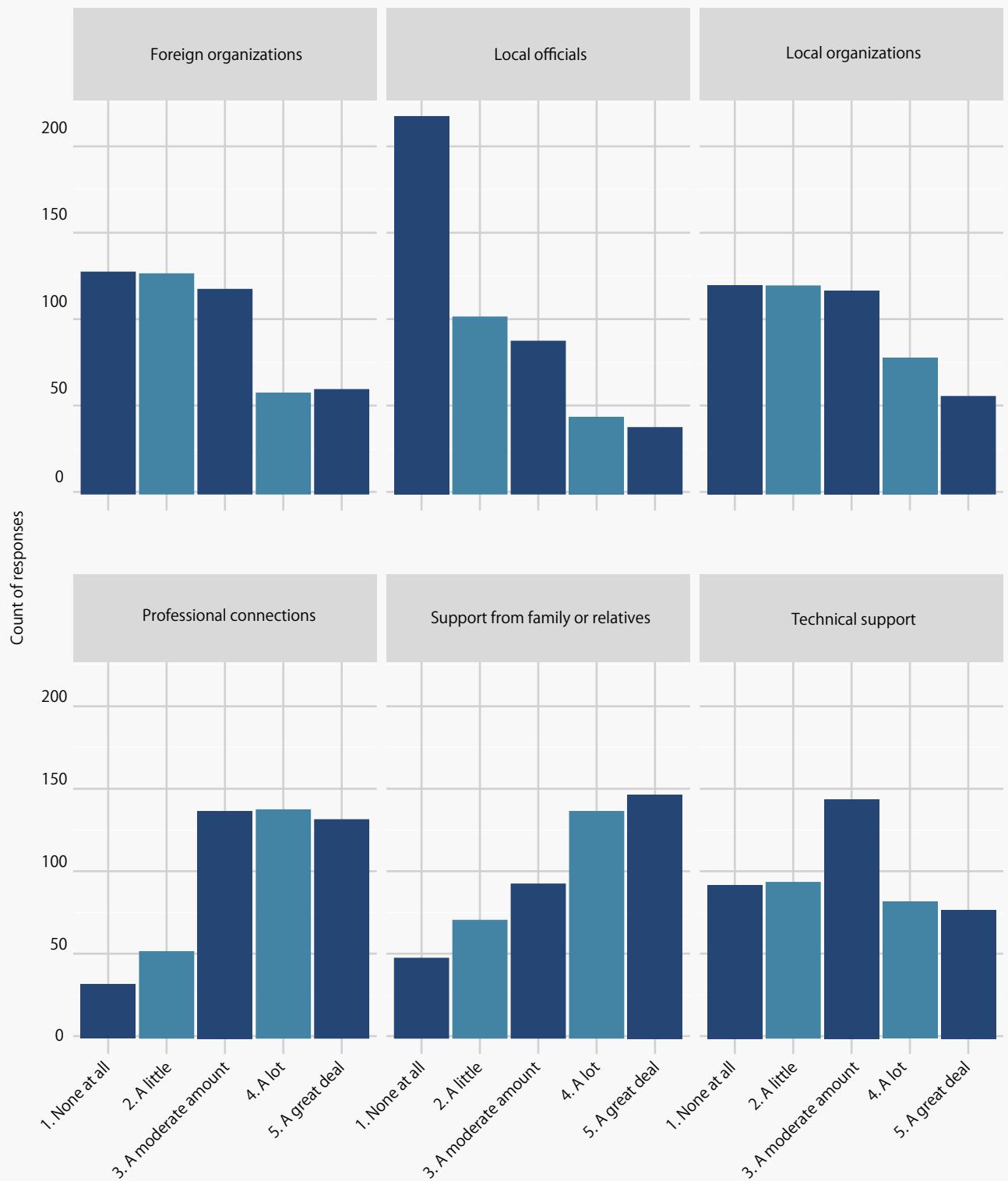


Figure 4. "How much access do you feel you have to the following resources to help you with your art/career?" n is variable by city.

ROADMAP TO CHANGE

a. INSPIRATION

Get inspired by best practices from around the world.



b. ASSESSMENT

Collect numbers and data, listen to stakeholders of the Creative Industries.



c. ACTION PLANNING

Develop a manifesto, a strategy and a roadmap for the next steps.



f. EDUCATION

Professionalize industry stakeholders and build knowledge among government officials about CCI.



e. ACCESS

Get access to funding, decision-makers and strategic partners.



d. AWARENESS

Widen awareness about what needs to be done and gain allies.

RECOMMENDATIONS

RECOMMENDATIONS

The previous chapter has documented Covid-19's impact on the cultural and creative industries in the seven cities under investigation and supplies the public with a vast amount of evidence. (Again, we'd like to remind you that you can find even more detailed outcomes from the Voices of Creatives survey in our [web-only appendix](#)!). In this part of the report, we show how the collected facts and figures can be turned into informed action.

Initially in our research, the VibeLab team had started off drafting recommendations right after each of the focus group workshops which, naturally, were about the specific needs of the country / city that participants were from. Or so we thought. Discussing these first drafts in a conference call with our local project coordinators we quickly realized that the majority of needs was surprisingly uniform for most or all cities (which is great news, by the way, for the prospects of international collaboration).



"You could literally just cross out "Beirut" from that recommendation, write Cape Town instead and you'd nail it. People here need exactly that same kind of action."

— Ivan Turanjanin, Local project coordinator Cape Town

We therefore condensed the gathered materials into a total of 21 recommendations grouped around four essential elements of a thriving CCI: Space, Community, Training and Funding. You can expect that, on average, 16 to 19 of these elements will be considered of high importance by creatives in any of the seven cities.

Despite these transnational similarities in wants and needs, local conditions still do greatly affect how to work with our recommendations on the ground - i.e. what local resources and structures to build on, what networks to include, what urgencies to consider, and so forth. We therefore asked our local team members to add their notes to each of the recommendations, highlighting aspects that must not be forgotten when designing initiatives that put those recommendations locally into practice. Many of the mentioned local networks, projects and resources are hyperlinked so that they can be easily found and contacted.

SPACE

COMMUNITY

TRAINING

FUNDING

SPACE

Physical creative spaces have been the most vulnerable to lockdown measures. While a lot of legitimate hope is currently being invested in the digitization of creative businesses, it is important to keep two things in mind: one, not all segments of the CCI, including venue managers, their staff, and live performers, are equally able to adapt to and monetize in digital spaces. Two, real life encounters in shared space will remain crucial for vibrant, creative ecosystems as they synergize with, rather than stand opposed to new possibilities of digitized interaction.

Our recommendations cluster “Space” looks at three types of spaces: physical spaces — such as studios, creative centers, and event venues —, temporary spaces — such as Music / Design / Fashion Weeks, trade fairs, or temporary uses of public spaces — and digital spaces. Our recommendations pay special attention to the future interaction and synergies between these three categories. Rather than asking about physical or digital, interventions to aid the CCIs will rather have to consider the connection between these three types of creative spaces and the potentials of hybrid strategies. Just as physical creative centers can get local populations in touch with new technologies, an online hackathon may be the right place to bring in internationally diverse expertise on how such centers should be designed.

© Sergey Mayorov, 2013

The Soweto Cooling Towers contain the largest mural painting in South Africa.



1. Creative Hubs

Music

Fashion

Design

Local stakeholders expect a development towards a reduction of physical creative spaces and capacities. They also see the need to shift focus towards establishing creative community centers that are more inclusive and accessible, and where high quality production equipment can be shared and financially sustained by greater numbers of users. Stakeholders from the design and fashion sector, for example, report a lack of spaces and creative ecosystems beyond simple coworking — i.e. spaces where they have access to advanced technologies, do prototyping, build their network and exchange knowhow. CCI workers in many cities are also running out of options when it comes to finding a safe, adequate and affordable home. It is vital that action is taken to address these challenges when implementing creative hubs. We recommend establishing, consolidating and further developing physical hubs as well as platform events (Music / Fashion / Design Weeks) where creatives build peer networks and can gain access to new customers.

- Assessment of creative hubs (permanent) and collaborative events (temporary).
- Creating partnerships and funding opportunities to develop event concepts, pop-up and permanent venues.
- Support this spatial shift through financial aid and by providing know-how (by e.g. Factory Berlin or Designmai Festival Berlin).

Notes:

Amman Design Week, Beirut Design Week and Fashion Week, Nairobi Design Week, and Suli Fashion Week are reported to be endangered because of the pandemic's repercussions — support for these widely acclaimed events seems well invested.

Sulaymaniyah's "Culture Factory" is described by many of its creative users as a perfect place. There is scope to accompany them to further develop structures of participatory decision-making within the center for the sake of its organic, user-oriented development.

Sulaymaniyah

Survey data on Sulaymaniyah's fashion sector shows a very clear lack of studio spaces and workshops (they rank 7th on the list of important spaces for business, in contrast to ranking in the top 3 in all other cities). This is supported by our focus group interviews, where fashion designers highlighted their need for a shared co-working place outside of their home offices where machinery could be shared and all working steps can happen in one space.

Sulaymaniyah

In Nairobi there are already some successful creative hubs, such as "Creatives Garage" which will host an online festival for different creatives, that allows a crossover for the different disciplines. In our focus groups these organizations, venues and institutions were also mentioned and recommended as working hubs and networks in the region: Metta Nairobi, She Trades, Swahilipot Hub Mombasa, Pwani Youth Network Mombasa, One Off Gallery and Kuona Trust.

Nairobi

In Dakar there is already a Fashion Week, running for over 7 years and there are plans to start Dakar Design Week and Dakar Music Week in 2021.

Dakar

In Cape Town, most people are traveling to the Central Business District (CBD) to get together for events. If the right hub with the right offer and / or amenities became available there could be a real opportunity to bring the creative sectors together and connect them to a network with global outreach, thereby accelerating the creative bounceback.

Cape Town

2. Live Music Venues

Music

There is a lack of physical spaces for the music community to meet and learn from each other, to create new collaborations and to share resources. Studios for rehearsal or recording are reported to be unaffordable for young musicians practising non-traditional genres. The mismatch for demand and supply holds likewise true for music venues suitable to small-to-mid-scale music events. Ignite the music scene's potential by protecting, supporting and developing venues, events, and festivals.

- Conduct a transparent, method-based assessment of spatial potentials (see *Creative Footprint* methodology).
- Nightlife advocacy associations in other countries, such as *Clubcommission Berlin*, offer a rich toolbox, including mapping adequate spaces, matchmaking formats for space owners and creative users, and offering awareness work and mediation for event organizers, venue owners and surrounding neighborhoods¹.
- Focus group participants promoted ideas to establish music production hubs that rather work with a membership model and are more inclusive, thus also sharing costs for equipment, reducing prices for musicians, and giving more space for experimentation².
- Provide tailor-made funding³.

¹. See page 99.

². See page 92.

³. See page 114.

Notes:

Beirut's music and nightlife infrastructure is expected to undergo extensive transformation. Projections from local music organizers include a reduction of venues and event sizes, stronger presence of local artists on stage, and transformation of event spaces to music production centers where investments into quality equipment are sustained by larger user communities.

Beirut

Amman's nightlife struggles because most older clubs and venues are now in the midst of residential areas and had to close or switch business due to noise complaints. Most music events currently take place at small bars around the city (capacity >100) which are not owned by members of the creative community. There are a lot of pop-up events that rent venues seasonally, yet compete with the higher paying wedding planners and corporate event managers. The production costs for nightlife promoters and event producers is high since most venues come without adequate equipment.

Amman

There is a vital cluster of small culture cafés around Saholaka Street in Sulaymaniyah where musicians gather, jam, and perform. However, they express the need for better production and recording spaces, and to revive the Beats in Suli festival as a platform with greater public visibility.

Sulaymaniyah

In Dakar, live music is in the hands of restaurants and hotels. That is why the program is often poorly curated. The only dedicated venues for music are large sized theaters. This means there is a lack of small capacity music venues (100-300 capacity) with a professional sound system and equipment that are accessible for local emerging artists.

Dakar

Addressing the closure of venues, focus group participants from South Africa see potential in unifying booking agencies in efforts to approach more hotels, clubs, and bars to curate music programs in so far underused spaces.

South Africa

In Cape Town most live music venues have been shut down because of losses suffered during lockdown. There are only a few venues left such as Modular and Stereo Culture to support the music scene. The Bridges for Music school in Langa is also reported to provide relevant support to musicians.

Cape Town

In Johannesburg, Braamfontein near the town centre is an area that contains a cluster of key music venues that are vital to support musicians. Further into town TOYTOY is reported to be another relevant space which has so far managed to survive lockdown restrictions.

Johannesburg

3. Public Space and Intermediary Use

Music

Fashion

Design

The physical and social dynamics of public space play a central role in the formation of public values and communities.

Streets, parks, squares, and other shared spaces are difficult to access for non-traditional creative products and arts. Examples where our focus group participants encountered such difficulties ranged from electronic or rock music concerts in public, to designer street markets, and public catwalk shows.

Helping stakeholders from the cultural and creative industries display their work in public space is particularly important in connection with four factors. One, producers find many of their most loyal online clients through personal, face-to-face encounter. Two, while the need for running one's own physical shop decreases with eCommerce, the need for temporary usage of physical space for personal client encounters may actually increase. Three, many physical creative spaces - in particular live music venues - have been lost and while conditions may soon allow the re-opening of events, the question is: where will they be held at? Four, many creatives emphasized their struggle with public preconceptions against their art and work. Displays in public space may be an integral element in increasing the public's access, acceptance and appreciation for CCI.

- Initiate collaborations between institutions of traditional arts and culture (e.g. museums) and local pop music and digital design communities for events and streaming projects.
- Support food or flea markets and include a music stage for emerging artists.
- Acquire empty facades and exhibition spaces of (public) buildings for murals and other forms of contemporary art to create public awareness.
- Convince global advertising companies to include local fashion, design and music in local product campaigns to increase their visibility in widely watched media.

Notes:

Beirut's urban design and policy framework doesn't create favorable conditions to use public spaces creatively, e.g. for public concerts or other presentations of creative work. In the midst of the economic crisis and the expected plummet of real estate, focus group participants rather see opportunities in repurposing private spaces for more inclusive, semi-public use and see a high need for this.

Beirut

Sulaymaniyah has two public spaces where a few cultural performances have taken place in recent years: Sara Square in the Old City that is surrounded by bookshops and cafés, and Azadi Park where the local government has announced it will install a "speakers corner", to honor free speech.

Sulaymaniyah

Our data from Nairobi shows relatively little importance of public spaces for music (a big gap when compared to South Africa but also Beirut and Amman). The space that is available is either down or not set up to be used for events (e.g. access to electricity).

Nairobi

Cape Town has many beautiful outdoor and public spaces ready for musicians and performers. They just lack programming and funding. The V&A Waterfront has done a good job of activating various performance spaces around the district.

Cape Town

4. Digital Marketplaces and Infrastructure

Music

Fashion

Design

Covid-19 has increased the pace of eCommerce growth and the shift to online shopping is expected to continue. Challenges most mentioned in our focus groups are the use and the establishing of digital marketplaces; especially in so called "cash-in-hand" societies (i.e. where customers prefer cash payment). Most focus group participants said they used Social Media such as Facebook and Instagram as their predominant sales platforms. We therefore must not oversee the close link between eCommerce and community building. Online marketplaces, consequently, seem to generate most income in connection with personal (and often offline) client contact.

- New self-management skills are required for creatives because of direct artist-audience relationships (without intermediary agents and promoters, etc.)¹
- Help the community find local, customer-oriented solutions to improve eCommerce (i.e. solutions that, for example, consider the very different availability of payment and delivery systems among the six countries) and establish sustainable services.
- Establish high-performing sales collectives among local producers to be represented at online marketplaces as well as international fairs.

¹. See page 105.

². See page 94.

³. See page 107.

Notes:

The development of eCommerce among fashion designers is not only a matter of training and digital infrastructure. Fashion designers repeatedly raised concerns that "customers want to touch the material and see the quality", or that "20 percent of customers generate 80 percent of the income", indicating that trying out a designer's work is the most important generator of further purchases.

Surprisingly, online spaces rank as highly important spaces for business for fashion designers in Nairobi and Sulaymaniyah only, contrasting findings from most other cities. In turn, this indicates a wide scope to develop capacities of fashion designers to generate more income online.

Our data from Beirut shows that online spaces rank last (!) when fashion designers were asked which spaces were most important for them to do business. Building Lebanese designers' capacities to thrive on digital marketplaces and generate income in foreign markets will be a top priority for their economic survival.

Beirut

Examples for local solutions to enhance eCommerce are the apps *Kubak* and *Boombeene* in Iraq - a country where neither postage nor digital payment are easily available. The apps offer platforms where shops find drivers to deliver goods and return cash payment, making online shopping and regional trade much easier². Focus group participants, however, report that although many digital services are being developed locally, few manage to sustain and regionally expand their business. Thus, business development support³ is needed.

Sulaymaniyah

There is an old crafts market in Dakar, but it doesn't fully reflect the contemporary Senegalese creative industries. A GIZ project turned a store in a shopping mall into a pop-up store for locally designed products. There is a need for a permanent sales space like this.

Dakar

5. Online Events and Streaming Platforms

Music

Design

Live streaming is becoming very popular in showcasing music and digital art. The use of live broadcasts can enhance and maximize direct communication with customers and community partners and allows them to reach and interact with more people across the world. Although there are successful DIY-online-community-projects, music sector stakeholders report that they find it hard to build an audience for their content, attract views and monetize streams.

- Develop local / regional streaming platforms for contemporary music that combine forces and can connect to international audiences (e.g. *United We Stream*).
- Build local partnerships (e.g. tourism marketing) to co-finance streaming production costs.
- Provide streaming equipment to share between stakeholders in CCI.
- Offer training interventions focused on content and audience development¹.

¹. See page 105.

Notes:

In Beirut, an online streaming initiative called "Away to" was created by *Factory People*, showing local talents and locations in Lebanon, before expanding to regional and international concepts. Several fundraising streams were also launched following the Beirut explosion to support local groups, while a streaming concept called "*Electronic Labor Day*" was created to specifically support nightlife staff.

Beirut

In the Levant, several noticeable online streaming initiatives were created during the pandemic. For Amman, these include *Live Music Jo* and *Radio Al-Hara*.

Amman

Non-traditional music producers from Sulaymaniyah reported that their audience is currently relatively small and they encounter too little interest in and resources for their music locally. As many of them prefer to produce music in the Kurdish language to build local interest, this fact also limits their potential audience beyond the Kurdish region. Finding solutions might be best supported by regional networking with peers, possibly in an online / hybrid framework.

Sulaymaniyah

Muze Club and *Gig Dynamics* have been very active streaming music from Nairobi. The Alliance Française has also been supportive in offering streaming capacity from its venue. There would be potential to stream from public spaces to create awareness for musicians/designers as well as their need for using public space.

Nairobi

Since there is no dedicated small music venue in Dakar, there is also a lack of highly trained professionals that could provide a high quality streaming standard set-up for local artists.

Dakar

In South Africa *United We Stream* (UWS) was very valuable to the local musicians. Several fundraising initiatives were launched through various partnership with UWS

South Africa

COMMUNITY

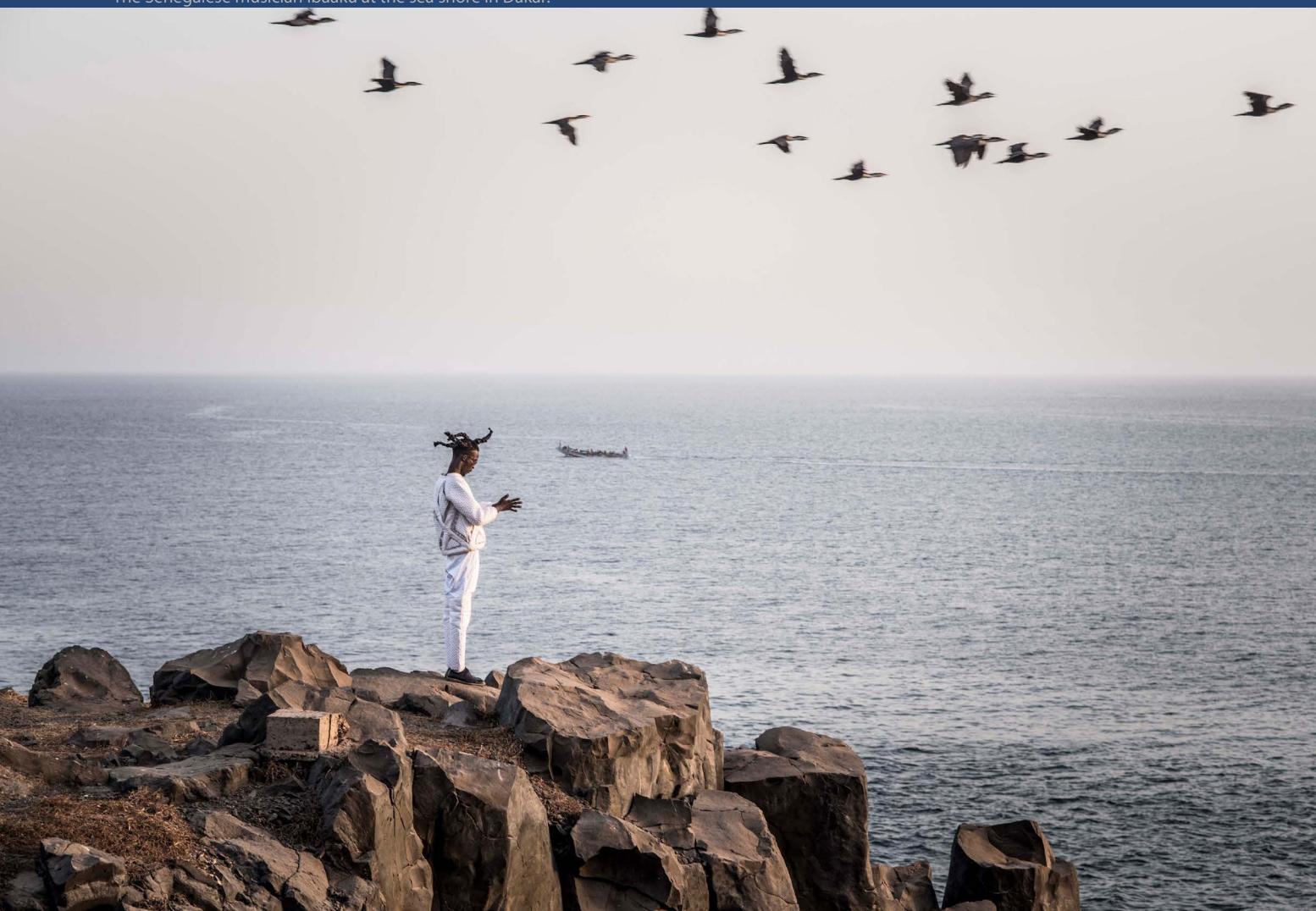
When we asked about the nature of resilience in the cultural and creative industries, we were strikingly reminded of one thing — the importance of people to people. While many hope that digitization, global reach, and new markets will be escape routes from the economic vulnerability the pandemic has revealed, the truth on the ground is that local community and personal relationships are what helped most people survive the immediate effects of this crisis.

But don't mistake non-monetary, mutual aid as only a last gasp means to survive. In fact, it might well be the essential currency boosting the digitization of most CCI freelancers and small businesses. Meanwhile, new digital tools and their rapid integration into project planning open up new potential of meeting, working, and also giving solidarity remotely.

In general, we have seen that resilience is greater where different sectors interact well. Cross-sector interaction requires conditions that facilitate encounter and dialog — open access, mutual awareness based on shared values or interests, and an ecosystem of shared physical and digital spaces, events, or networks. Our recommendations for the cluster "Community" include everything that builds resilience by targeting those elements.

© Jean-Baptiste Joire, 2017

The Senegalese musician Ibaaku at the sea shore in Dakar.



1. Careers in the Creative Industries

Music

Fashion

Design

Many CCI professionals experience social stigmas associated with their work or communities. It creates obstacles in education, lowers income, and limits diversity of expression. This stigma can be lessened with several approaches.

- Provide information and build awareness of the productive potential of the creative industries and their positive role in local economic development. Facts-and-figures-based information campaigns can have great impact. If reliable data about certain creative sectors is not yet available, provide resources and know-how to collect it.
- Increase the quality and reputation of education in CCI disciplines by designing more needs-based, state-of-the-art and sustainable education programs. Intensify the collaboration between experienced CCI workers, international organizations that offer ad-hoc training, and universities that offer degrees in CCI fields to reach that goal.
- Help to sharpen the profiles of creative professions and an understanding in the wider ecosystem of how creative skills are best implemented in clients' businesses. It's about mutual learning — creative professionals and their clients could be well-targeted with a free strategic consultancy program to accompany their cooperation.
- Support outward-looking, public-facing programs and spaces to enhance public familiarity with diverse creative expressions (if safety can be ensured).
- In places with safety risks, support spaces where divergent creative communities that face risks when performing in public can safely gather and build talent. Also provide incentives to non-music events — such that gain public consensus — to include non-traditional music side-programs. This is a recommendable strategy to allow public familiarity with such performances.

Notes:

CCIs are key for recovery processes and building cities back. The involvement of the creative community in programs such as World Bank's *Culture in City Reconstruction and Recovery (CURE)* could be beneficial for cross-sector dialog. CURE is a program where the CCIs constitute a driver for urban regeneration and development.

In Lebanon, the educational sector is reported to be moving in a direction where quality higher education is reserved for expensive private institutions and non-CCI disciplines. Positively highlighted were the *Académie libanaise des beaux-arts* for creative studies as well as *Creative Space Beirut* and *ESMOD* for Fashion. There is a strong need for support, however, in graduates bridging the gap between these programs and finding employment and income in the cultural and creative industries.

Beirut

Focus group participants from Sulaymaniyah's music sector who play non-traditional genres (hip hop, heavy metal, rock, electronic music) reported facing the strongest social disapproval of all sectors. There are many inspiring examples in the SWANA region (South West Asia and North Africa) from recent years where new music scenes and successful careers emerged under similarly difficult conditions. Connecting non-traditional musicians across Iraqi cities as well as other countries (such as Jordan, Lebanon, Palestine, or Egypt) could help get ideas flowing. Building links to regional scene-related online media (such as Cairo-based *Scene Noise*) could also be a valuable resource to gain both information and exposure.

Sulaymaniyah

Our data shows that in many of the researched cities there is a high offer of self-taught / non-formally educated CCI workers, making their price — and not their training — the prime marker of difference. Increasing formal education can help increase income possibilities. For Sulaymaniyah, for example, focus group participants voiced strong demand to develop a university program for digital design.

Sulaymaniyah

Kenya's educational system had a big shift in the last two years to offer more Arts and Crafts classes.

Nairobi

In Dakar there is a profound lack of visibility for the CCI. The private educational sector does not offer much training in creative industries. Focus group members are not aware of any specific plans or policy intentions by the Senegalese government to expand arts education offerings.

Dakar

In South Africa, a more rigorous approach to mentorship and internship can help close the gap between finishing studies and finding work placement. The government is heavily involved in trying to close this gap at present.

South Africa

2. Advocacy for CCI, Arts and Culture

Music

Fashion

Design

With few exceptions, the researched countries don't have unions, syndicates, or organized artist movements in the music, fashion, or design sectors. Advocacy groups and business development programs are important structures to strengthen communities. These programs and groups enable better training capacities, provide access to information and know-how in the sectors and can enrich academic cooperation. In cities around the world, specifically designated, or community-elected officials are being tasked with connecting and empowering their creative economies, community members, and state and non-state stakeholders.

It was remarkable that while in the Global North we see a lively debate on Covid-19, safer event concepts between the music and events sectors, universities, and policy-makers, such debate was completely absent in our focus groups. This can be attributed to missing sector interactions and under-developed advocacy structures, meaning that in the surveyed countries, the idea of music organizers influencing political decisions on lockdown measures and event regulations by proposing concepts seems unlikely and, therefore, isn't given priority. This is a good example of how advocacy is relevant to ideation and development.

To gather people for a united project takes a lot of time and effort. Contacting all the individuals and bringing them together needs funds and know-how. What is needed is to "institutionalize" a network of venue and festival operators, music producers and artists to work more together as a group.

- Build transparent, membership-based associations for advocacy in synergy with existing, value-driven communities.
- Get advice from music and nightlife advocacy groups from around the world when forming new advocacy groups (e.g. Clubcommission Berlin e.V. or Night Mayor Amsterdam Foundation).
- Support advocacy initiatives in project management and capacity building by initiating networking events and think tanks to tackle the disappearance and/or shortage of creative space.
- The relationship between state actors and local CCI professionals in the researched cities is, at best, distant; but common interests — such as lowering thresholds

for business registration, enhancing cross-pollination between CCI and tourism — may motivate in the look out for greater synergies. Supporting the CCI community to collect data about its sectors may help spark a constructive, facts-based dialog.

Notes:

Radio Al-Hara is a bottom-up, crowdsourced, DIY online radio founded during the pandemic by musicians, designers and activists based in Palestine and Jordan, and one with strong ties to Lebanon. United projects of such kind are an excellent source of expertise for investigating potentials, contents and formats for advocacy.

Due to the highly condensed clustering of CCI professionals, businesses, and spaces around the central neighborhoods of Jabal Al-Weibdeh, Jabal Amman, and Downtown, advocacy structures in Amman may have potential to evolve around the CCI community in this area and common needs (e.g. creative space, noise conflict mediation), rather than based on individual sectors.

Amman

In Sulaymaniyah, focus group participants voiced the need to strengthen the forum of creative users of the Culture Factory and develop structures for participating in decision-making in dialog with higher levels of venue developers and public officials. X-Line youth council has been active in this sense for the past years.

Sulaymaniyah

Kenya based HEVA Fund is Africa's first dedicated finance, business support and knowledge facility for the creative industries and can be a role model for other countries.

Nairobi

Goethe-Institut Nairobi organized workshops in partnership with Clubcommission Berlin on creative advocacy in 2016 that were well received.

Nairobi

In Senegal there are a few advocacy networks in music. In 2020 there also has been an association for beatmakers established, enabling musicians to get SODAV membership cards (Senegalese Copyright and Related Rights Office). It is advisable to join efforts to create a collective dynamic and also involve other sectors in the creative industries.

Dakar

3. Local Community-Building

Music

Fashion

Design

CCI professionals across all sectors frequently described the creative industries in their city as a “site of disconnected micro-bubbles” with close relationships within each bubble but sharp disconnects from other groupings. Exclusion commonly appears along the lines of:

- Age groups, career levels, and social classes (gate-keeping),
- Districts, cities, or urban and rural areas (spatial disconnects),
- Professions (gap between creative producers and related industries),
- Sectors (lack of cross-sector exchange).

Our data shows the huge importance of mutual aid. Being part of a bubble increases resilience through access to this resource of support. Potential could lie in understanding what is effective about community support and translating it to more inclusive organizational frameworks.

- Identify powerful, value-driven creative communities and help them build accessible, membership-based advocacy associations¹.
- Map the fragmented CCI communities, both within and between cities, and curating encounters (job shadowing, residencies, short-term apprenticeships, visiting programs, united projects, online conferences, etc.).
- Build inclusive forums for newcomers by providing shared working spaces², incubator programs, mentorships³, and visibility through dedicated newcomer programs at public events.
- Consolidate platform events⁴ and develop strategies for better outreach and inclusiveness.
- Connect creative producers and related industries (e.g. fashion designers and textile producers). Contribute to cross-sector collaboration by avoiding the habit of designing sector-specific projects.

¹. See page 98.

². See page 92.

³. See page 102.

⁴. See page 92.

Notes:

In the face of the currency crisis and rising prices, venue managers in Beirut are putting their heads together to uphold the inclusivity of nightlife (but need support in developing and implementing strategies). Our data indicates that Beirut's music venues play an important role not only for music but for cross-sectoral exchange and collaboration. Venue managers are obvious allies for projects to strengthen inclusive creative communities.

Beirut

Fashion designers in Beirut are in need of establishing a better network to local textile producers in order to reduce their import dependency and lower costs. Collaboration with designers from other disciplines could help them to develop localized production cycles and find innovative solutions.

Beirut

Takween in Amman is a good blueprint for newcomer support in Design. Also, *FOOD:FABRIK* is a program that brings designers of different trades and food producers together to innovate in the culinary industries. Both of these are programs under the Global Project Cultural and Creative Industries.

Amman

In Sulaymaniyah, focus group participants highlighted the need to strengthen structures for younger people to have more say in decision-making at the local level and bridge generational gaps. Mentorship programs and strengthening youth councils or other advocacy structures are obvious needs.

Sulaymaniyah

The Acacia Collective is a platform for trading and sharing resources and skills within the design creative community in South Africa. Also the *SWIFT* organization was mentioned; empowering women in South Africa by offering mentorship programs. Conferences like *Design Indaba* were mentioned as good examples that foster collaboration and appreciation.

South Africa

4. International Community-Building

Music

Fashion

Design

International community-building and professional cooperation is hindered by current travel restrictions and — for some countries — longer lasting obstacles to international trade, postage and digital payment. While new digital tools and possibilities should not be left unexploited, our research gives strong indications that offline encounters remain essential. We therefore recommend to, wherever possible, combine online and offline formats for international community building.

- Support and possibly upscale private sector initiatives that provide matchmaking services for CCI professionals with international clients and mobility support¹.
- Set up a volunteering program in the partner countries targeting international CCI professionals interested in giving non-monetary work in exchange for access to the creative communities. Lebanon could be a pilot location for testing this.
- Offer micro-grants² that help cover side costs of self-organized support by international communities (e.g. travel and accommodation of volunteers, shipping of donated equipment by solidarity initiatives).
- Many formerly on-site activities— training, workshops, events — should be shifted online and targeted at international participants, ideally in combination with offline encounters of those participants³.

¹. See pages 112 and 113.

². See page 110.

³. See page 105.

Notes:

The creative community of the Levant and the wider SWANA region maintains close and very vibrant personal ties. Important hotspots include Amman, Beirut, Ramallah, Haifa, and Cairo. Strategies should take those ties (i.e. a wider look at demand, resources, partnerships) into consideration and not stop at national borders. There is potential to integrate Iraqi communities in this ecosystem.

There is high international awareness for the crisis in Lebanon and focus group participants have reported receiving a lot of solidarity from their international friends and colleagues. Certain frameworks might help to turn more of such willingness to support into real, effective action (e.g. *For My People Fundraising compilation*).

Beirut

There are many private initiatives — especially in the crafts sector — where Senegalese fashion designers are able to take part in trade fairs in other African countries. For the large majority of other sectors such as music, it is difficult to do business outside of Senegal.

Dakar

5. Mentoring

Music

Fashion

Design

Previously mentioned disconnects between newcomers and established professionals spread with the pandemic. Events and physical encounters were restricted while at the same time gate-keeping in the communities became fiercer. Yet, in some places and disciplines as well as for some technologies, there are simply no established professionals available; forcing newcomers to often rely on YouTube tutorials and trial-and-error to make their way. Mentorships are a tool that can tackle both the need for building more inclusive communities and peer learning.

- Mentoring programs can rely on a solid history of research and strategies that should be considered in designing programs. It is not enough to establish contact between mentor and mentee, but mentors especially should receive special training on deeper aspects of mentoring, and be regularly accompanied in their task.
- If there is a lack of mentors locally, online mentorships or hybrid formats (starting with a personal encounter and being continued remotely) can build bridges between peers internationally.

Notes:

Remote mentorships can be a suitable format for retaining links between the CCI community in Lebanon and Lebanese creatives who left the country.

Beirut

There is particular scope for mentorship programs for the CCI community in Sulaymaniyah, which is the youngest across samples and strongly DIY-based. Since there might be an actual lack of possible mentors locally (e.g. for rappers and web-coders), remote online-based mentorships could offer great new options.

Sulaymaniyah

Focus group participants from Nairobi and Amman in particular reported a generational gap between senior creatives who receive a lot of attention and who act as gatekeepers, and a younger, emerging scene struggling to be recognized. Mentorship programs might help to establish constructive bonds between those groups. It is interesting that both groups —newcomers and older professionals - mostly frequent very different spaces in the city. This spatial element—i.e. dissolving existing limitations to access - should be considered.

Some of our focus group participants in Senegal were alumnis of the Goethe-Institut's training and mentoring program for musicians. But for young aspiring creatives in other sectors there is not yet a properly structured mentoring scheme available.

Dakar

6. Residencies

Music

Fashion

Design

Facing the threats of local brain drain, divestment, closing infrastructures, and reduced visits by international artists, the CCI community—and particularly its emerging talents—will benefit from international exchange opportunities (residencies, job shadowing, apprenticeships, etc.) to gain fresh ideas. Investigating whether programs of such kind could be realized online or in hybrid forms (real life encounters and online meetings) is highly interesting.

Residency programs offer distinct advantages as they take on network building with the clear purpose of delivering output, whether an artistic work or a prototype. Within the framework of residency programs, creative excellency is awarded in terms of a stay in another city or abroad. Travel expenses and costs of the residency (food, accommodation and working or rehearsal space as well as a project fee, if applicable) are financed by the grants program.

- Provide a personalized funding package for CCI stakeholders looking to develop artistically and professionally through a particular project that is time-limited.
- Residencies may be linked with and continued by remote mentorship programs.

Notes:

Musicboard Berlin is offering residencies for Berlin-based artists worldwide, such as in Cuba and Uganda.

Although for Beirut several residencies already exist such as *Berut Art Residency*, *Starch Foundation* and *Berut Berlin Express*, there is demand to create residency programs that are more intricate and foster cross-sector collaboration. International exchange is a high priority for research participants from Lebanon — whether through dedicated programs or by providing mobility grants for self-organized initiatives.

Beirut

Focus group participants from Sulaymaniyah have a strong thirst for gaining insights into the creative ecosystems in other countries and collect examples of good practices from abroad that could advance the CCI in Iraq. An international exchange program with a focus on cultural management and bottom-up development seems particularly suited to the expressed needs.

Sulaymaniyah

Kuona Trust in Nairobi offers creative residencies for visual artists since 2008, but has been undergoing some restructuring.

Nairobi

Constitution Hill is currently looking at setting up a residency program in the Central Business District in Johannesburg.

Johannesburg

TRAINING

Education and Training, as well as affordable technology and internet connections were considered to be the most important success factors across all investigated countries. These findings suggest that digitization needs to be accompanied with training and education to improve accessibility and digital revenue models.

While face-to-face trainings have an important role in network-building, e-learning comes somewhat naturally to the communities we spoke with and offers many opportunities: to reduce costs, respond in more agile ways to current needs, work with more diverse trainers, create shared courses for participants from different cities, and build synergies with existing online resources.

This section focuses on contents, formats, and stakeholder alliances for training to respond to, on the one hand, skills and know-how needed in response to shifts that the pandemic accelerated and, on the other, new possibilities of combining online and offline, formal and non-formal learning.

© Creative Space Beirut, 2020

Creative Space Beirut is a social enterprise that encompasses a school of design, fashion label, and online retail platform. It intertwines technical and creative education with various businesses and socio-cultural initiatives.



1. Digital Business Training

Music

Fashion

Design

New opportunities are mostly connected to the ongoing and accelerated digitization. The shift to an increased use of digital technology in the creative industries leads to a change of requirements in skills and training across all countries and sectors. Training should go digital not only with regard to contents but also formats.

Online training programs open new opportunities to transmit know-how to remote areas on topics which wouldn't attract enough participants if offered as an on-site event. They furthermore can help to build networks between disconnected creative communities of different cities, especially if combined with mobility programs and offline encounters. As yet another option, the production of video tutorials can make knowledge available on-demand.

For stakeholders from Music, training should include education about distribution and monetization in digital markets. Skills in need of development include:

- Understanding streaming platforms, how to monetize them or using them for beneficial partnerships¹,
- Learning how to implement crowdfunding models (e.g. Patreon),
- Online audience development and digital marketing on platforms such as Bandcamp, Twitch, Youtube, Discord,
- Development of knowledge about intellectual property, music publishing, sync licensing, performance rights organizations, and national and international copyrights,
- Business skills and basic legal know how,
- PR and promotional skills.

For stakeholders from Design and Fashion, skills in need of development include:

- Online audience development and digital marketing on platforms such as Instagram, Tiktok, Snapchat, Pinterest (Fashion), Dayflash, Artstation, The Dots, Behance (Design),
- Communication skills such as storytelling and content creation,
- Online marketing skills including digital advertising,
- Sales knowledge for eCommerce platforms.

Notes:

Creative professionals frequently reported gaining a lot of information they need on YouTube or specialized online learning platforms such as LinkedIn-owned *Lynda*. Existing resources should be known and integrated when designing new training.

Iraqis seem to be highly used to accessing knowledge through online tutorials which highlights this as another interesting option. They nevertheless report the lack of entry-level tutorials (e.g. Photoshop basics) in Kurdish for teenagers who do not yet have a sufficient level of English to access available videos.

Sulaymaniyah

While the sample in Nairobi has adapted well to the digital shift accelerated by the pandemic, the current levels of supply can be sustained with adequate levels of income and profits. The demand may be there but does not bring enough money to producers. *Good Times Africa* are at the forefront with this. The event production company recently offered a big workshop for people in the creative industries or for those aspiring to be in the business.

Nairobi

In Senegal, where our sample is relatively older than in other survey cities, there is still a big potential in adapting to digital markets. Small businesses in Design and Fashion especially couldn't profit from digital marketing and continued lack of access. Also internet access (data) is rather expensive in Senegal.

Dakar

In South Africa, focus group participants recommended training programs by *Design Indaba* and *UMUZI*. The focus should be on more accredited training in the creative sector. This gives the training legitimacy and allows for more rebate opportunities from the government.

South Africa

¹. See page 95.

2. Non-Formal Learning

Music

Fashion

Design

Survey data in all partner countries indicate the under-developed role of universities in providing adequate education for careers in CCI. Survey participants mostly gained their skills through self-education — percentages of self-education are between 30 and 40%. In Iraq and Kenya, online learning was equally, or even more important than formal education. With this in mind, non-formal learning resources and formats are already central to the growth and resilience of creative professionals. And for a group that must stay abreast with rapid technological and economic changes, the skill to acquire knowledge in such agile and needs-suited ways may actually have a range of advantages to institutional education.

- Take on an interdisciplinary approach in training to bridge gaps between sectors as well as between academic and informal education. Peer-to-peer learning can take place in barcamps, workshops, hackathons, or thinkathons for creatives across sectors.
- Use prototyping and design-thinking approaches to foster innovation (ideally in combination with provided funds).
- Build reliable and accessible online learning resources.
- Create mentorship programs¹.

¹. See page 102.

Notes:

The interaction between CCI communities and universities should be improved in all researched countries in order to develop the quality of teaching, act on the mismatch between provided training and skills needed (apparent in our data), and close the social disconnect between students and experienced CCI workers.

There is scope for mentorship programs for the CCI community in Sulaymaniyah which is the youngest across samples and strongly DIY-based. Focus group participants also highlighted the need for entry level online learning resources for diverse creative disciplines in Kurdish language for young people.

Sulaymaniyah

The University of Nairobi has an incubation space where many interdisciplinary events like hackathons are being offered.

Nairobi

The South African government is currently investing in several training initiatives in the creative sector. *Cape Town Electronic Music Festival Connect* is a training program specifically aimed at previously disadvantaged areas and communities and helping to put artists on a global platform.

Cape Town

3. Business Development and Internationalization

Music

Fashion

Design

Training in business development can support CCI sectors to further professionalization and internationalization. Most creatives in our study are either self-employed or running their own businesses. Local, regional, or foreign markets each require different business strategies and management skills to create profitable opportunities in international business networks, to develop and maintain partnerships, to provide support for new product development, and to recognize and respond to customer needs.

- Offer business training and courses to learn how to professionally negotiate and collaborate within businesses environments regionally and internationally (primarily digital sales enablement).
- Initiate round tables with designers and industrial producers¹ to create purchasing pools.
- Design a model of export capabilities and synergies in the CCI sector to enhance export performance of local products.
- Develop better recycling strategies in the fashion sector - to improve local production cycles to strengthen sustainability and reduce import dependency.

¹. See page 100.

². See page 98.

Notes:

The project *FOOD:FABRIK*² may serve as a good case example for connecting designers and industrial producers and developing new business models including localizing production cycles.

Fashion designers highlighted the relevance of events (weddings, nightlife) to designer fashion sales. Thus the effect of moving sales online was limited while lockdown measures on events remained in place. Many designers sought to radically pivot their production (e.g. from dresses to face masks) to respond to the measures. There is a clear demand for consultancy regarding such challenges in business development.

Internationalization is an urgent need for practically all CCI professionals in Lebanon. They cannot be sustained anymore by their local client base alone and are under pressure to access foreign markets and currencies to maintain business.

Beirut

According to our focus group participants, in Iraq, the development of eCommerce requires better solutions for online marketplaces, remote payment and delivery. Local start-ups developing digital platforms for these services are reported to be numerous but small in size and often fail to establish themselves.

Sulaymaniyah

The design sector in Nairobi is growing, but there is still a great deal of untapped potential especially regarding professionalization in business development. The sector needs guidance on how to run businesses. This can be provided by workshops for entrepreneurs as well as workers, so they can facilitate sustainable and fair working conditions.

Nairobi

In Dakar there are a number of Business Development programs run by organizations like Alliance Française and Goethe-Institut that are essential to the CCI sectors in the region.

Dakar

4. Financing and Fundraising Expertise

Music

Fashion

Design

Many creatives struggle with writing grant proposals. Grant offers should, therefore, be accompanied with training and / or e-learning resources. Additionally, local consultancies can give creatives an overview of available funding opportunities, motivate and support them with their applications, and guide them towards possible alternative strategies for financing their initiatives.

- Build local consultancies offering workshops and consulting for creatives interested in grants and funds — *Kulturförderpunkt* or *Music Pool Berlin* are examples of best practices.
- Providing information about liabilities and advantages of obtaining grants from organizations and the selection of grants organizations.
- Specific training for crowdfunding can motivate creatives to go public with their ideas.
- Providing less bureaucratic micro-grants that are easier to access and offer an entry-level experience for managing funds would offer an ideal opportunity for CCI practitioners to learn the needed skills on the go¹.

Notes:

Focus group participants from all countries stressed the need for a platform to support and disseminate information on calls for tenders and funding programs for the CCI sectors.

Bubblegum Club from Johannesburg is highly recommended as an example of successful funding proposals during our focus groups.

Johannesburg

¹. See page 101.

FUNDING

To face rapid transformation, having access to financial resources is of crucial importance for the cultural and creative industries across all six countries and the demand for assistance in this last cluster of our recommendations is the highest. From the focus group interviews we conducted, we found a great deal of difference between countries and creative communities in terms of how they have access to finance in its various forms, or envision suitable strategies to get it.

We were surprised to find that receiving direct cash grants had played a relatively small role for most CCI workers, if any. While this may mirror a healthy mentality of entrepreneurship and independence from donor organizations on the one side, many participants voiced difficulties in accessing information about available opportunities, matching eligibility requirements, and—if they did receive a grant—reconciling its conditions to their own ways of working.

In this concluding cluster “Funding” we collected recommendations to improve financial aid for the cultural and creative industries as well as target areas of high importance, as voiced by our focus group participants.

© Amman Design Week, 2019

Civil Architecture x studiolibani’s work “Minor Paradises” is a prototype for a waterless public garden. It represents a new approach to “gardening” for places where the assumingly central resource - water - is scarce.



1. Micro-Grants

Music

Fashion

Design

Throughout our research, the need for non-bureaucratic, agile, and small sized financing instruments (200 - 1000 EUR) was emphatically expressed by our interviewees. We've seen two fields where such instruments would be particularly needed. First, micro-grants would lower the threshold for newcomers who have little experience in writing proposals and managing funds to learn these skills hands on. Second, in all places where "mutual aid" appears as an important resource of communities, micro-grants can be an effective support mechanism to cover side expenses and facilitate the flow of such aid. We have also seen throughout our research that loosely organized bottom-up action groups have been among the most visible drivers of resilience but there are no funding schemes suitable to the logics and needs of these important initiatives.

In order to be feasible, opening micro-grant schemes would require institutions to find alternatives to their usual, highly regulated procedures.

- Micro-grants are recommended as an instrument for (or rather instead of) training inexperienced applicants how to write applications and manage funds ¹.
- Micro-grants should cover a wide range of wants and needs that promote self-organized non-monetary aid, and basic expenses for strengthening international relations.
- Another strategy to make financial support more available to newcomers, lower formal requirements, and assure that funds are awarded to continuously changing beneficiaries is the format of newcomer awards.

¹. See page 108.

Notes:

Good practice examples for micro-grants include *Quartiermeister* and *Youth Bank*. Quartiermeister is a German beer brand and social business which gives out all of its profits as micro-grants to initiatives which have a positive social impact. Youth Bank is an initiative founded in the UK and later expanded to other countries which offers grants of up to 400 EUR to applicants aged 14-25.

The British Council in Nairobi has consistently offered micro-grants over the last years, helping creatives to travel or to buy certain equipment. *Advance Africa* provides an overview of current grants programs and scholarships. — Nairobi —

2. Funding for Small, Established Businesses

Music

Fashion

Design

CCI businesses need investments in order to digitize and target new markets. Our focus group participants perceive that most foreign aid and major business development programs are designated for businesses which meet criteria in registration, employment, track record, or revenue that they cannot. Focus group participants voiced the common impression that access to funding depends largely on "knowing the right people" and that they are continuously awarded to the same networks of beneficiaries.

While newcomers and start-ups in their first two years in business (seed/early stage, with a high affinity to technology) seem to find aid opportunities and suitable skills training programs, it is those slightly more established professionals and businesses that report such gaps in business development support.

- Analysis of funding options for small businesses and freelancers.
- Improvement of communication and centralization of information about the offers of different aid organizations.
- Provide free consultancy to newcomers with little experience in applying for and managing funds to support early business development concepts like prototyping and showcasing.
- Design funds for growth and expansion phases in CCI.

Notes:

Fashion designers in almost all focus groups report not being able to find funding opportunities as funding schemes mostly operate with "conservative" categories of art or industry which exclude fashion.

In Sulaymaniyah, focus group participants emphasized that financial support in business development should be connected to training or mentorships to guide investments.

Sulaymaniyah

Focus group participants from Sub-Saharan Africa highlighted positive experiences with organizations like *Boost Africa*, or *Close the Gap Hub*.

HEVA fund, *Hivos International* and the British Council offer funding for small creative businesses in Nairobi.

Nairobi

The GIZ offers some funds in Senegal, but our focus group participants experienced the application process as complicated and additionally reported difficulties with access and feedback.

Dakar

3. Funding and Matchmaking to Access Foreign Markets

Music

Fashion

Design

For creative professionals in the researched countries it is extremely difficult to be sustained by the local market alone. This creates pressure to access foreign markets to maintain business and is especially true for sectors which rely on imported materials—they are exposed to risk from economic volatility. Approaches may include:

- Curated matchmaking with foreign clients,
- Mobility grants and visa support for travels related to client acquisition,
- Participation in trade fairs and international conferences,
- Micro-subsidies as incentives for first time collaborations between local stakeholders and clients abroad, which could have a multiplier effect and be effective gate openers.

Notes:

This recommendation is of particular relevance for Lebanon due to the fall of its local currency which practically brought the local market to a standstill. The need for “fresh money” is urgent — i.e. funds that arrive in foreign currency, and not converted to LBP¹.

Beirut

Free trade helps Jordan to make it more affordable to import products and raw materials made in the USA and Canada and to export products from Jordan to those countries and allows for a higher profit margin on the finished goods e.g. fashion and design items.

Amman

Travel funding programs for fashion designers from South Africa’s Department of Trade and Industry have been highly recommended in the focus groups.

South Africa

¹. See page 88.

4. Tour Funding

Music

Pre-pandemic, the researched countries' scenes managed to host more and more international artists, thanks to improved availability of venues and a professionalized tour management that distributed costs. Local scenes can further increase vibrancy and both local and regional interest as music destinations by improving conditions for events and supply in adequate venues.

Given the limited options on the local market (and the devalued local currency in Lebanon), supporting tours of local artists abroad will help them generate income in "fresh currency" and, thus, help the local music market. A funding model to promote the mobility of artists for appearances at important music festivals that will presumably re-open in 2022 could be an important business development for the music industry.

- Investigate needs in the partner countries' regions for improving the touring ecosystem (including supply of venues, regional network-building, know-how, and funding needs).
- Support visa applications and provide travel grants for local and international artists.
- Provide band buses and vans at favorable conditions.

Notes:

Musicians from Lebanon benefit from the international awareness and solidarity for their situation as well as by a low exchange rate of the Lebanese Pound (LBP). International festivals would most likely place them prominently on their line-ups.

Beirut

Amman, in its role as a music city, must be understood within a wider regional ecosystem. There is a vibrant exchange with the scene communities of Ramallah, Haifa, Beirut, and more. Due to the size of its population / potential audience and its stability, Amman holds a central position in this wider ecosystem.

Amman

There has been some touring funds previously available for South Africa and other neighboring Southern African Development Countries (SADC) in collaboration with Canada to tour North America and in particular Canada. This touring assistance is currently on hold because of Covid-19 but the involved partners are engaging in virtual performance and educational exchanges at this time. Also the National Arts Council (NAC) has support facilities for creative projects/productions touring. Apparently the relief of NAC is heavily oversubscribed.

South Africa

Business and Arts South Africa is a Public Private Partnership body to assist creatives in South Africa in the development of their markets both locally, regionally in Africa and globally including partnerships with Cultural bodies like the British Council, Goethe-Institut, Alliance Française to assist in touring.

South Africa

5. Grassroots Music Venues

Music

At first, it shouldn't come as a surprise what our survey data presents evidence for: music clubs are, by far, the music workers' most important spaces for doing business. A little more inspiring, however, is the evidence that clubs also rank highly as business drivers for designers and fashion creators in most countries. Providing relief funds to support and (re-)build music venues will, thus, impact employment and income for a wider range of professionals in the creative industries than many might expect.

- Emergency relief funds for Beirut's venues destroyed in the explosion on 04. August 2020.
- Business development support¹ in places where a lack of grassroots venues is reported (e.g. Jordan, Iraq, Senegal) and where existing venues need to change business models and adapt to radically changed conditions (e.g. Lebanon).
- Program awards to target content-driven, small and medium-sized music venues² - Germany's [APPLAUS](#) is an example of good practice.
- Grants for live concerts for small and medium-sized venues to help pay better fees to performing artists.

Notes:

Music venues have been shut down by Covid-19 related restrictions in all researched cities. The entire research showed Beirut's club owners have been the group most severely affected — through the tri-fold catastrophe of currency crisis, lockdown, and explosion. The long list of support that is needed includes funds for the reconstruction of damaged and destroyed venues — including re-equipment, and consultancy in changing business models to the dramatically changed conditions and expected smaller revenues and capacities of events.

Beirut

The music sectors in Senegal and Jordan face similar challenges in that music venues are not owned by professionals of the music sector. Both countries would benefit from support to found new, permanent grassroots venues.

Some live music venues in Nairobi already had to close down during the pandemic (such as J's Bar and Restaurant and The Hutch). And many more are not sure that they can open up again. Grants to support Nairobi's stages will benefit artists and industry professionals equally.

Nairobi

¹. See page 93.

². See page 93.

6. Tax Reductions and Exemptions

Music

Design

High taxes in the CCI, especially on electronic goods and performances, are frequently mentioned by creative professionals as frustrating hurdles to doing and recovering business. They limit their access to adequate technology and increases production costs considerably. Reductions and exemptions from, or refunds for these taxes could be a useful government support for businesses in the creative industries.

- Make a comparative tax analysis on hardware and software needed for music production, Fashion and Design.
- Convince governments to pass tax reductions, exemptions or refunds for the creative sector - for example on technical equipment or events / performances.
- Negotiate special discounts with manufacturers of electronic goods.

Notes:

Current taxation in Beirut is 17.5% on each item stipulated in an artist contract and doesn't encourage promoters to host live concerts. Furthermore given that most needed goods are imported and need to be paid for in USD or EUR, this has become impossible in the current economic crisis. Therefore tax breaks and merchandiser discounts to Lebanon should be considered to support the local creative scene.

Beirut

Import tax in Jordan varies between 16% and 25%. Sales tax is at 16%. Performance tax is 20% for international artists, 10% for Arab and local artists and 4% for Jordanian artists who pay an annual fee to the artists' syndicate. Especially the high import tax on electronic goods was repeatedly voiced by Jordanian participants as an obstacle to their work.

Amman

Current taxation on performances in Dakar is 20% which is very high and doesn't encourage promoters to host live concerts. It is widely felt by the focus groups participants that this tax should be reduced.

Dakar

GLOBAL CASE STUDIES

GLOBAL TRENDS AND STRATEGIES

The pandemic has affected creative industries throughout the world with particular severity. The scale of economic impact staggering, and is coupled with the less quantifiable but equally devastating impact on the mental health of creative industry workers facing intense financial strain and evaporating career opportunities.

There is of course no such thing as a “one size fits all” solution. Despite the many common challenges faced by these industries, the context in which they are experienced, and the tools available in addressing them, differ greatly. However, ongoing global exchange—both formal and informal—can inspire, educate, reveal commonalities and encourage innovation; helping scenes to develop effective short-term responses and build resilience for the future.

Covid-19 has animated discussions around the creative industries like never before, and any survival tactics designed to address the current crisis can also be adapted and applied over the long term. Similarly, many representatives bodies and creative networks that have been formed in response to the pandemic will serve their creative communities for decades to come.

This section of the report therefore explores support models, short term survival tactics and long term resilience-building practices that have aided creative industries elsewhere in the world, to strengthen the case for their application in the regions focused on by this report.

Defining and understanding creative communities

This chapter considers creative professionals working in Music, Fashion and Design, which includes artists and creators, as well as the multitude of essential supporting roles within the industry which enable their work to be realized, shared and sustained.

Covid-19 exacerbated the vulnerability and insecurity of these workers, a pre-existing problem for the industry due to a number of factors. The vast majority of creative industry workers are gig workers, who face frequent job insecurity, often miss out on the benefits awarded to long term employees, and, when Covid-19 shut down their industry,

slipped through the cracks of most government-issued unemployment support packages. Those running cultural spaces are equally vulnerable, combatting the challenges of short leases, disappearance of affordable spaces due to gentrification, and business models especially affected by Covid-19 restrictions due to their reliance on human proximity and traditionally slim profit margins.

Creative workers are often poorly organized on a national or regional scale, hard to reach and ineffectively measured or classified. They also face an additional challenge in securing support, due to a lack of understanding and appreciation in the wider community and in government of their cultural and economic value.

ORGANIZATION AND INSPIRATION

Enhance international knowledge exchange and networks

Networks which connect creative communities on a global scale have proven invaluable since the beginning of the pandemic, as a source of inspiration, informal support and most importantly providing a platform for knowledge exchange. Survival and recovery strategies have been shared and adapted, and used to highlight best practice and encourage healthy competition between cities.

Many initiatives begin informally over social media like Facebook groups, or messaging systems like WhatsApp. More formal examples include [Live DMA](#), a European non-governmental network working to support and to promote the conditions of the live music sector through international collaboration. A more recently formed international collaboration is the [Global Nighttime Recovery Plan](#) initiative. Spearheaded by [VibeLab](#), and bringing together a vast range of international perspectives and case studies, it offers expert opinions and strategies to aid in the reopening and recovery of nighttime industries, and has facilitated and accelerated the rate of global knowledge exchange on these important issues.

Establish representative bodies

A crucial early step in defending and supporting the creative industries is establishing a representative body of stakeholders who, as participants in the industry themselves,

understand its structure, goals and current needs, and are closely connected to its workers.

Any advocacy on behalf of the creative industries is magnified when expressed with a united voice. Therefore the purpose of this organization is not only to ensure the many different sub-sectors within the creative industries are represented, but that they are connected and in regular communication with each other. This way differing resources can be combined, and alternative perspectives and agendas within an industry can be addressed internally; serving to provide a more holistic picture when communicating with media or government, rather than fracturing or diluting a cause.

Case study: *Cultural and Creative Industries Union of Georgia*

In April of 2020 Georgian nightlife stakeholders formed the Cultural and Creative Industries Union of Georgia (CCIU Georgia), a not-for-profit and non-governmental association advocating for the electronic music and nighttime events industry encompassing nightclubs, bars, festivals and other cultural or educational spaces connected with electronic music culture. With the goal to aid the local club culture and nighttime creative industries in surviving the pandemic and professionally lobby their interests for the first time.

Beginning as a Facebook group of 60 members, CCIU Georgia soon began meeting in unused club venues throughout Tbilisi to discuss what could be done to save the struggling scene. The organization was one of the first to partner with global streaming initiative United We Stream, through which the CCIU raised and distributed 30,000 GEL to participating venues, at the same time raising the international profile of Georgian electronic music makers and creative spaces. The CCIU Georgia also paid out over 160,000 GEL in salaries, raised through sponsorships with private and state actors.

In addition to raising funds, the CCIU Georgia has opened up channels of communication with government, a new experienced for Georgian creative industries, allowing them to present the government with a detailed, 6 month reopening strategy. For the first time, nightlife and club culture was officially as a national economic and cultural resource by the mayor of Tbilisi (Georgia's capital), who also allocated 2million GEL to activate the CCIU's proposed reopening strategy. The bulk of these funds will be distributed as grants via the CCIU itself, who have proposed a transparent and comprehensive system of distribution by a panel elected by industry stakeholders for the purpose.

Gather data

Traditionally the creative industries represent a dark spot in workforce measurement, but the catastrophic economic losses of Covid-19 prompted urgent data gathering in many cities, to produce accurate estimates of the economic impact of lockdowns, and make recommendations on required support. Surveys have been the key tool in this process so far, such as the *I Lost My Gig* survey, first launched in Austin, Texas and imitated worldwide, a quick-response data-capture project to quantify the immediate impact of the pandemic on live event and entertainment industries.

There is also need for information gathering via focus groups, comprehensive censuses and creative space mapping, as employed in the *Creative Footprint* project—applied in Berlin, New York and Tokyo so far—which measures the creative health of a city based on factors like the availability, affordability and diversity of its creative spaces.

Accurate data is an empowering tool for creative industry advocates, adding credibility to stories and arguments, and directing the government towards evidence based decision-making. Standards should be established in the data collection process which ensures information is aligned with other sources, transferable and accessible, and fully transparent.

Develop city-specific recovery roadmaps

In order to move beyond the discussion phase, each region's creative alliance or representative structure must create its own roadmap to recovery for the industry, based on global best practices that are adapted to local conditions. Whether these roadmaps provide a structured action plan for the industry to use, or outline steps which a government can take or fund, the plan is a necessary prerequisite to meaningful action, giving an industry direction and clearly articulating its needs and proposed solutions to the media and wider community.

Long-standing club union, *Berlin Clubcommission*, has a history of producing these blueprints, including a recent effort to establish rapid testing systems in collaboration with volunteer medical professionals, to enable the return of safe events.

SUPPORT MODELS AND REOPENING STRATEGIES

Support models:

Non-financial government support

For creative communities in some regions, especially among those addressed in this report, expecting targeted financial aid from the government is simply not realistic. There are however other ways governments can support the recovery of creative communities that do not involve monetary hand-outs, for example dictating eviction moratoriums to give creative workers security, the suspension of prohibitive fees and taxes usually levied on the events and hospitality sector, and the flexing of regulations to enable all manner of cultural activations to be staged more safely and simply, which we will explore in more detail in the following section, 'reopening strategies'.

Mutual aid, private sector aid, and direct to artist patronage

Removing government from the equation, there remains a variety of both short term and sustainable support models which direct essential finances and resources to creative industry workers. The following case studies cover three of these models: mutual aid, private sector aid and direct to artist patronage.

Case study: *United We Stream*¹

Due to the often inadequate responses of governments, mutual aid and a sharing of resources and services have emerged as critical emergency responses to the pandemic. Nightlife venues have organized to crowdfund monetary aid for their staff. Nightlife workers have also come together to donate resources to raise and leverage additional funds to be distributed not only to their peers financially impacted by the pandemic, but to other organizations

providing assistance to groups also devastated by the pandemic. Those unable to provide direct resources have shared this information with others, widening the reach of these fundraising networks.

United We Stream Asia (UWSA) is an offshoot of global mutual aid streaming movement United We Stream, which provides an open-source model for creating a mutual aid broadcasting and fundraising platform. With streaming events featuring +2000 artists in 117 cities, it has generated millions of streams and five-figure sources of donations for participating venues, their workers and the talent and technical staff employed in the events. The most important impact, according to UWSA's Bangkok-based organiser Phuong Le, is the awareness, community cohesion and political legitimacy it has created. She says that in Vietnam, "it was the first time the state newspapers were reporting about electronic music - the tourism board approached us to work together and do streams at iconic places." In Thailand, where the virus was at very low levels in the summer, the cohesion built during shutdown gave local acts center stage when clubs re-opened. Phuong says it demonstrated that "the scene seems to have grown more [during lockdown] in 4 months than in the 4 years beforehand."

Case study: *COSIMO Foundation*²

The COSIMO Foundation, established in the Dutch city of Groningen in 2019, was created to generate the positive impact that stronger collaborations between cultural sectors and businesses can bring, marrying the need for sufficient and consistent funding for venues, event organizers and cultural organizations with businesses' desire to create social impact.

The foundation implements a 'matchmaker' model that allows businesses to efficiently find and support creative projects with tax-deductible donations and allows cultural and creative sector actors to access funding without needing to create complicated non-profit organizations. Tax laws in many countries support this. Creatives submit project proposals and their required budget, then COSIMO approaches companies in its database who have indicated interest in supporting themes, styles or causes which are featured in the proposal. COSIMO confirms the availability of funds and, if both sides agree, facilitates the transaction; ensuring all legalities.

With further analysis of laws and tax deductions, the COSIMO model can be replicated as an efficient system of emergency aid in many other places around the world. The foundation currently operates in the Netherlands and is planning to begin its activity outside the EU in mid 2021.

¹ Global Nighttime Recovery Plan, Chapter 4, 2021, p.23. Author: Michael Fichman.

² Global Nighttime Recovery Plan, Chapter 4, 2021, p.39. Author: Merlijn Poolman.

Case study: *Patreon*³

The movement of the music marketplace towards an emphasis on live performance revenues has left creators vulnerable. The pandemic exposed the unstable nature of this business model. Platforms which create and foster sustained artist-patron relationships have bridged the gap for some through the pandemic and may allow a more sustainable income mix going forward.

Patreon is a subscription, member-based internet platform that allows creators to engage directly with their fans, who pay for exclusive content distributed via the platform. Creators set up parameters for content distribution and fans subscribe or pay for individual content. This model allows creators to have a more consistent, sustainable source of revenue as well as allow for direct contact with their most dedicated fan base. While some creators utilized Patreon prior to the pandemic, many have pivoted to the platform since in order to broaden their source of income. During the first three weeks of March 2020 as the shutdowns began globally, 30,000 new creators joined Patreon.

Reopening strategies: Flexing regulations to enable Covid-safe event practices

Access and activation of outdoor public space

Continued pandemic-related restrictions on use of indoor areas has led to a sudden increase in demand for outdoor space. The spread outdoors is not only necessary for safety during the pandemic, allowing patrons to physically distance and reduce the chances of virus transmission, but can also increase the cultural vibrancy of a city and the subsequent morale of its residents; making culture more readily accessible and easily discoverable. Many city governments have encouraged this use of public space by simplifying pavement permits for hospitality venues, with the success of the hospitality sector's 'spill' onto the streets encouraging cities to put these practices in place in the long term. In addition to use of urban pavement spaces, cities' green spaces can also be used as creative platforms in both times of Covid-19 and beyond.

Case study: *Berlin Open-Air Events*

Berlin's musical and cultural landscape has long been shaped by outdoor events, especially "free open-air", in the city's plentiful

green and open spaces. Since 2013, Berlin Clubcommission, a representative body for the city's many clubbing venues, has been facilitating dialog with event organizers, policy-makers, researchers, and business associations to identify appropriate spaces for outdoor gatherings, educate organizers on best practices, and simplify processes for holding safe, legal and sustainable events. Those long-term efforts took on more significance during Covid-19, having laid the groundwork for Covid-responsive innovation and experimentation and given the government greater confidence to support these event experiments. Initiatives taken during 2020 include the Berlin government appointing liaisons to manage legal outdoor gathering permits, Berlin Clubcommission convening multi-stakeholder discourse and organizer information sessions, identifying suitable open-air event locations across city and facilitating pilot events, and publishing an updated *Open-Air Event Checklist* with Covid-19 safety information.

Cultural activations and activity at night

In addition to spreading outdoors, cities can avoid unsafe congestion of people during the pandemic by also spreading out events and activities in time, making use of the full 24 hours in a day. Increasing cultural activity at night is also key to cities' financial recovery, the nighttime economy being a sizable but often overlooked portion of any city's economic pie.

Night-centric policy-making can include later opening hours for retail, streamlined approvals for temporary music and other cultural activations e.g. in bookstores, cafes, better late night transport, and protection of sound rights of venues from encroaching residential development by adopting 'Agent of Change' laws, as in Melbourne or London, which dictate that if a music venue already exists in an area, any subsequent residential developments are responsible for the installation and cost of soundproofing that development.

Business pivots

In order to maintain some kind of income during periods of Covid-19 restrictions, many creative businesses found equally creative pivots towards alternative revenue streams. From nightclubs hosting seated cabaret experiences, to bars offering cocktail delivery services, and fashion designers switching to mask design and delivery. Though born from temporary necessity, the ability to pivot in this way could save a creative business from going under when faced with any number of future challenges.

³ Global Nighttime Recovery Plan, Chapter 4, 2021, p.40. Author: Tara Duvivier.

Case study: *Village Underground*, club turned bicycle storage facility⁴

Village Underground (VU) is a multi-purpose events space located in the heart of East London. Following the Covid-19 outbreak, the VU team realized it would not be possible to operate as a ticketed cultural venue for quite some time, so ran a business analysis to figure out what else they could do to support themselves. VU observed that, with the closure of gyms and leisure centres, and increase in road closures in London, many people chose cycling as a form of outdoor exercise or transport. This was encouraged by the UK government, which recognized it as a means of both reducing the likelihood of contagion via public transport, and reducing car congestion. The market verified this perceived trend: share values of bike companies started to boom.

With almost zero economic resources, VU needed to think carefully about the assets they did have. VU's location turned out to be very valuable for people who daily cycle to and from their offices in the City and might require secure cycle storage. It was decided the VU Cycle Park was worth researching and modeling. The cycle park was established, in partnership with Look Mum No Hands!, an independent bike shop that provided expertise and credibility to the new venture. VU also looked for other income streams and made use of their alcohol license by running a bottle shop, and partnering with a coffee vendor to sell both to the cyclists and the street.

Virtual cultural spaces and events

Virtual events and experiences have proliferated as a reaction to lockdowns and closures—and offer their own set of opportunities, challenges and questions. At their best, they positively challenge both artist and audience to expand their expressive and technological practice to explore new components of performance and connectivity.⁵ They can connect communities who can't otherwise be together in person, increase international exposure of local artists, provide a 'digital reconnaissance' experience for would-be cultural tourists, and increase employment opportunities for designers.

Most artists, however, do not monetize adequately from online performances or experiences, and with no game-changer in site, there is a big question mark over the ability of virtual spaces to raise significant and sustained revenue, and over who benefits most from that revenue, considering the current most accessible platforms are owned by Facebook and Amazon.

LONG TERM RESILIENCE AND GROWTH

Awareness campaigns

Without community support, advocacy for creative communities is often overlooked by both government and private sector. Creative awareness campaigns with the wider community are therefore essential to build engagement with and appreciation for the cultural and economic value of local creative industries.

In addition to bringing widespread attention to industry needs, awareness campaigns should focus on the greater goal of educating the public in local creative scenes, celebrating local artists and fostering pride in local creative output.

Build bridges with government

In many creative communities' trust in government is low, and within governments, understanding of creative communities even lower. Developing long term resilience, therefore, must include building bridges between these two groups. Awareness campaigns are an important prerequisite to this effort—governments are rarely inclined to address concerns until they understand those concerns to be shared by a majority of voters. Awareness campaigns can then be solidified through sustained advocacy on key issues, communication and liaisoning ahead of major events, and ongoing relationship development. Annual or quarterly conferences and workshops which bring creative industry stakeholders and policymakers into the same room are a good way to facilitate this, and the development of organizations or liaison positions that can serve as creative advisors to the government.

⁴. Global Nighttime Recovery Plan, Chapter 4, 2021, p.16-19. Author: Katharine Khan.

⁵. Global Nighttime Recovery Plan, Chapter 4, 2021, p.24-25. Author: Alessio Kolioulis.

Increase creative urban infrastructure

Accessible and affordable creative spaces are an increasingly challenging proposition in gentrifying urban environments, and yet creative industries depend upon their existence. Access to multi-disciplinary creative spaces enables artists to be inspired, feel safe, realize ideas, access audiences and grow in both practice and creative vision.

Where government support is not forthcoming for the creation and protection of such venues, creative collectives can be formed which, with combined resources, are able to take out leases and repurpose spaces for a variety of cultural pursuits, for example *De School* in Amsterdam, which transformed a former technical college into a multifaceted 24 hour cultural space, at different times operating as a club, restaurant, gallery, conference space and a variety of other cultural activities.

Establish creative-centric governance structures

A valuable long term asset to creative industries is a creative-focused governance structure, one designed to address the unique needs of those communities, provide a consistent point of liaison between industry and government, and advocate within government for creative-centric policy-making. The rising global movement of night mayors and nighttime governance is a strong example of this.

It should be noted that many of these governance structures begin life as non-governmental organizations and representative bodies, such as those recommended in the first section of this chapter.

THE NEW NORMAL - CONCLUDING PERSPECTIVES

The New Normal will be more digital and more personal. Tech-skills and awareness for mental health, global outreach and local bubbles, digital spheres and physical spaces only seemingly suggest opposing pulls. In reality, they are all elements that can easily move in a single direction.

Physical creative spaces will remain important for social encounters and well-being, acting as inner city or local community connectors that actively share resources and know-how. These spaces will see in the process of digitization a vital ally; allowing a hands on approach to new technologies and their possibilities in further connecting and creating.

Cultural and creative industries are in an ongoing process of crystallization. The profiles of disciplines, the knowledge and skill needed to execute them with excellence, and the understanding and appreciation of professional creative work among the wider public are continuously sharpening. This crystallization will be accompanied and accelerated by an evolution of educational programs which, in the time to come, will develop to be greater in variety, closer to the demands of markets and the possibilities of technology, better certified, and invested in by more highly reputed institutions.

Maintaining inclusiveness and diversity in creative communities will be a central challenge as pressures are great to form enclosed social bubbles or to allow dependency on financial structures that determine social and creative decision-making. Community venues, independent events organisers and artists will struggle with increasing costs, regulations, and further uncertainties resulting from the pandemic. Facilitating independent and lateral city-scale and inter-city encounters, interdisciplinary collaboration, and advocacy networks will be vital to counterbalance such tendencies.

Normalized digital co-working and an increased awareness for social, economic and racial injustices will make purpose-driven businesses worldwide seek collaboration with CCI professionals in the Global South, showing higher appreciation for their experiences and expertise, and amplifying their voices in the world.

APPENDIX

TEAM AND BIOS

VibeLab

VibeLab is a leading, purpose-driven consultancy agency in all things at night. Our expertise and international network of over 3,000 CCI professionals, scientists, and public officials in more than 100 cities on 6 continents helps all those seeking out new paths to improve creative ecosystems. VibeLab is fast-acting, trendspotting and strategizing with all parties involved in creative communities, private and public sectors. By facilitating the exchange of ideas and providing tried and tested tools, formats and best practices we amplify subcultures.

Find out more about VibeLab's work via <https://www.vibe-lab.org> and <https://www.nighttime.org>.



Lutz Leichsenring | Senior Consultant

Lutz is a Berlin-based cultural advocate and consultant. Lutz is co-founder of [VibeLab](#), and spokesman of [Clubcommission Berlin](#). In 2017 Lutz developed along with scholars of Harvard University the [Creative Footprint](#) methodology to measure the creative ecosystem of cities. In 2020, Lutz co-initiated the [Global Nighttime Recovery Plan](#) and [United We Stream](#) in more than 120 cities globally.



Mirik Milan | Senior Consultant

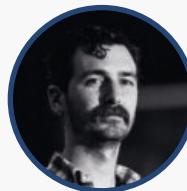
Mirik is an Amsterdam-based cultural advocate and consultant. The [VibeLab](#) co-founder, Mirik was one of the first night mayors in the world, reshaping nighttime governance globally. Mirik is co-author of the paper 'Governing the night-time city: The rise of night mayors as a new form of urban governance after dark' published in January 2020 by the journal, *Urban Studies*.

Project team:



Thomas Scheele | Head of Project

Thomas is a Berlin-based cultural manager, performance artist, and mental health advisor. He spent 2016-2019 in the Middle East, studying Arabic and coordinating the cultural program for Goethe-Institut in Palestine. He is passionate about bridging the logics of cultural undergrounds and institutions.



Michael Fichman | Head of Research

Michael is a city planner, researcher and lecturer at [PennPraxis](#) at the University of Pennsylvania's Weitzman School of Design. He is a nightlife organizer and musician, and a member of Philadelphia City Council's Arts and Culture Task Force. He is also an editor of the [Global Nighttime Recovery Plan](#).



Alessio Koliulis | Research Consultant

Alessio is an urban economist and cultural geographer working at [The Bartlett Development Planning Unit](#) (University College London). Prior to UCL, he worked as Grants Officer and Impact Analyst for various development organizations in Latin America and the Middle East.

APPENDIX



Asha Bazil | Research Assistant

Asha is a student at the University of Pennsylvania pursuing a masters degree in City Planning. Her research focuses on the importance of equitable technology access within cities. Prior to UPenn, she worked as a consultant in Washington D.C., New York City, and Medellín.



Kai Sachse | Project Assistant

Kai is a consultant and researcher working at Clubcommission Berlin. He graduated in Social Sciences and Political Communication and gained experience in development cooperation and informal education.



Jordan Rahlia | Author

Jordan is a Sydney-based freelance writer and editor focusing on music and night culture, creating content which supports and explores creative scenes across the globe. She is lead copywriter at VibeLab, and editor of its news platform nighttime.org.



Richard Foster | Author

Richard is a writer and artist. He is also Communications Manager at WORM, Rotterdam. Richard writes regularly on contemporary music for the Quietus and the Wire. His research on the Dutch post-punk movement is published by Palgrave, Intellect Books and Cambridge Scholars. His debut novel is scheduled for spring, 2022.



Diana Raiselis | Project Assistant

Diana is a Berlin-based cultural researcher and program manager, and a 2019-2021 Alexander von Humboldt Foundation German Chancellor Fellow. Her work in residence with Clubcommission Berlin and VibeLab, focuses on the relationship between nightlife and sustainable cities. She is also an editor of the Global Nighttime Recovery Plan and a founding member of Los Angeles Nightlife Alliance.

Country Coordinators:



Samer Makarem | Lebanon

Samer is a Beirut-based marketer, nightlife entrepreneur and social and political activist. He is co-founder and head of marketing for the arts & entertainment group Factory People. He is a strategist and political organizer in Minteshreen, a youth-led political movement formed from Lebanon's October uprisings.

**Shermine Sawalha | Jordan**

Shermine is a visual and performance artist, producer, curator and entrepreneur from Jordan. Shermine helps cater for the needs of artists and audiences across the SWANA region, creating communities and “playgrounds” for underground culture to thrive in; while educating the public through entertainment.

**Shero Bahradar | Iraq**

Shero is a Baghdad-born, Suli-based program manager of the *Culture Factory* and is specialized in youth activities. In 2016, he founded *X-Line* to support young creative talents. Shero is currently working on a *virtual reality game* to engineer new futures.

**Wambui Kinyua | Kenya**

Wambui is “the number one go to person” in the Nairobi underground music scene. Apart from organising she is also a great event-goer and fan of all forms of creative content.

**Dudu Sarr | Senegal**

Dudu is the founder of *Dakar Music Expo* as well as manager and agent of the world renowned Senegalese musician Youssou N'Dour.

**Amadou Fall Ba | Senegal**

Amadou is central to Dakar's urban culture and Hip Hop scene. A founding member of the *Africulturban* association and director of the *Festa2H festival*. Amadou works with the mayor of Dakar, promoting urban culture, via Dakar's *House of Urban Cultures (MCU)*.

**Ivan Turanjanin | South Africa (Cape Town)**

Ivan is a Cape Town-based artist, producer and cultural consultant who previously managed the South African Red Bull national culture program. Ivan established Active Imagination, which promotes the cultural and creative sectors in Africa through curated partnerships and programs; bridging the gap between artists, the private sector and government.

**Kavir Magan | South Africa (Johannesburg)**

Kavir is an entertainment industry strategist and entrepreneur based in Johannesburg. Once the general manager of the electronic music online publication Pulse Radio in Africa, Kavir is co-founder and general manager of *Xtixs* in Africa, a global events ticketing and fintech platform that finances festivals shows and artist tours.

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