The Creative Sector and Youth Employment – Kenya

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Contact Information

Genesis Analytics (Pty) Ltd - Johannesburg, South Africa

Office 3, 50 Sixth Road

Hyde Park, 2196, Johannesburg

South Africa

Post to: PO Box 413431, Craighall, 2024,

Johannesburg, South Africa

Tel: +2711 994 7000

Fax: +2711 994 7099

www.genesis-analytics.com

Authors

Tolu Oyefeso, Roy Gitahi

Contributors

Beatrice Gichohi, Majina Mwasezi, Naomi Kimani, Paul Ngugi, Paul M. Njuguna, Rijk, Marlou, Roosjen, Geja

Contact person

Tolu Oyefeso, *Senior Associate at Genesis Analytics*

toluf@genesis-analytics.com

+254 (0)70 194 5800

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Introduction and Project Overview

Background and Context

The Creative sector remains an important facet of the Kenyan economy, providing long-term employment to creatives with an immense potential for export earnings and extensive growth. Despite this, the sector has faced an apparent challenge in accessing finance, compounded by other adverse market factors.

The primary objective of this assignment is to collate new and existing evidence on various dynamics within Kenya's creative landscape that will inform overall strategic decision-making for CFYE, affiliated partners, and the associations they work with to develop Kenya's creative industry. The project aims to address critical questions related to youth employment in Kenya's creative industry, focusing on gender inclusivity, systemic barriers, job decency, and the impact of technological advancements. The CFYE seeks evidence to inform strategies that promote sustainable growth and development in the industry.

Specific learning agenda research topics include:

- **Gender mainstreaming and inclusive practice**
    - The challenges and opportunities that exist for marginalised groups (specifically women and those with disabilities) in Kenya's creative ecosystem
- **Job decency**
    - The role of mentorship in promoting job decency amongst youth and the dynamics of job decency between emerging and experienced creative sector participants
- **Technological advancements in artificial intelligence (AI)**

    - The emerging technology trends in Kenya’s creative industry, their impact on the industry, participation of creatives, and broader economic development, and the challenges that might arise in balancing this technology with human creativity

- **Systemic barriers**

    - The systemic barriers (financial, legal, policy barriers) that exist within different branches of the creative sector and the skill gaps that exist in creative sector participants

The broader impact anticipated on the creative industry as a result of the evidence-driven approach includes enhanced Training and Mentorship Programs, increased gender inclusivity, policy Influence, increased innovation by revealing fresh avenues for youth involvement in the creative sector, economic growth, and improved employment quality.

Summarised Project Approach

Summarised below is our overall research approach to meeting the needs of this study. Three broad research methods will be used.

Desktop research was employed as the primary methodology to explore the learning agenda research questions pertaining to Kenya's creative ecosystem. This approach involves a systematic collection and analysis of secondary data from various sources to gain insights into the prominent creative sub-sectors in Kenya. Key data sources will include government publications such as policy documents, statistical reports, and industry studies produced by government agencies such as the Ministry of Arts and Culture, Kenya National Bureau of Statistics, Kenya National Innovation Agency, and relevant regulatory bodies; industry reports and publications; and academic publications and media reports.

Genesis Analytics utilised key expert interviews to augment our findings, leveraging our stakeholder relationships to obtain the perspectives of key individuals and organisations across the Kenyan creative ecosystem - including regulatory players, organisations focused on the creative sector, and other donor and/or development institutions.

Genesis Analytics also used a creative sector participant survey to engage with creatives in Kenya, gathering invaluable insights into the industry's landscape. By directly interacting with creatives, the survey will capture firsthand experiences, challenges, and aspirations, providing a rich data set for analysis. This primary data will be instrumental in identifying key trends, opportunities, skill gaps and needs, and technological changes within the Kenyan creative ecosystem, enabling Genesis Analytics to develop tailored recommendations for industry stakeholders and inform the design of effective support programs.

OVERVIEW OF KENYA'S CREATIVE ECOSYSTEM

Although precise definitions for the creative industries are by definition complex, the creative industries are generally recognised as contributing up to 4% of global GDP and 5% of Kenyan GDP, a share that continues to expand, as societies become wealthier, and patterns of consumption of creative products and services change.[1][2] Not only do the creative industries play a unique role in defining how societies see themselves and in building cultural cohesion, but they can also be an important source of jobs and export earnings.

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

[1] How the creative economy can help power development, UNCTAD. Available here

[2] Kenya Creative Industry Position on Finance BIll, 2024. Available here

the world trade".[3] Definitions of the "creative industries'' vary according to different sources, and often extend to include elements of the media and ICT sectors, including publishing, animation, and gaming sub-sectors.

A number of trends in Kenya are driving the growth of the creative ecosystem, impacting the entire value chain for creative goods. Kenya's digitally native and young population are the key driver of the growth being experienced by its creative and innovation ecosystem. The creative and innovation ecosystem has undergone a positive transformation, supported by various private sector players, as well as the active involvement of the Government of Kenya to foster creativity and entrepreneurship, evidenced through programs such as the Ajira Digital Program.

Table 1: Key trends in Kenya's creative ecosystem

Trend	Overview	Relevance to the creative sector
Digital Transformation and Emerging Technology	**There is increased crossover between digital technology and creativity**, which has led to an increase in the capacities of creatives to develop and disseminate their creative works.	Digital transformation and increased use and adoption of emerging technologies is a critical driver for any digital innovation ecosystem. Nonetheless, this comes with various challenges to implement, chief of which is financial, with the costs of acquiring equipment, as well as the cost of ongoing access (e.g. data costs) to required infrastructure services being a major factor.
Mobile driven	**The**	The increasing use of smartphones and mobile phones, as well as improved

[3] Creative Economy Report 2008, UNCTAD. Available here

ecosystem	**widespread use of mobile phones and the increasing affordability of internet-enabled smartphones have created new opportunities for innovators to produce and distribute their work**, and for entrepreneurs to develop innovative digital solutions.	broadband and network access drives the demand for online learning and training, as well as the demand for digital solutions. This trend is further supported by the rise of e-commerce, mobile money, and digital logistics services which have transformed how business is conducted in Kenya. A number of players are offering an increasing number of ways to drive smartphone adoption. Notably, players such as Safaricom are offering flexible payment terms to make access to smartphones more realistics. In the public sector, the government of Kenya is supporting the production of more affordable, locally made smartphones through the development of key manufacturing and assembly plants. Through these initiatives, the intent is to further make high quality smartphones more accessible. Together with improved digital infrastructure, mobile technology enhances accessibility to skills programs, or other solutions and products. This further enables a larger segment of the population to participate in the digital innovation economy.
Large youth population	**Kenya has a rapidly growing youth population, with an estimated 60% of the population under 30 years old.**[4] This youth population represents a vast pool of talent and creativity that can drive digital innovation.	Investing in programs that empower young people with digital skills and entrepreneurship training is vital to unlock the potential of Kenya's youth. While a number of capacity building programs are implemented by a variety of stakeholders in the sector, coordination amongst these is lacking. Existing programs are noted to focus on implementing trainers, as opposed to the longer-term view of what happens to the creative development beyond the learning programs. To this end, a practical focus on implementing learnings in real world scenarios should be encouraged. The Kenyan "youth bulge" represents a significant opportunity for economic growth and development if the right investments and support systems are put in place to harness the innovative potential of the youth population. Growing demand for advanced digital skills, particularly big data/analytics and Artificial Intelligence, remain high priority innovations that are likely to see further adoption in the ecosystem by 2025.[5]

[4] Kenya National Bureau of Statistics. Available here

[5] World Economic Forum, The Future of Jobs Report, 2020. Available here

Policy and Regulatory Environment	**There is a growing recognition of the need for supportive policies and regulations to nurture the creative and digital innovation ecosystem**.	While efforts are being made to enhance the regulatory framework surrounding the creative sector, legislation in Kenya around the creative sector is uncoordinated, with the existence of multiple bills being presented to parliament from various ministries. Specific bills include: - Culture bill by State department of Culture, Arts and Heritage (2024) - Creative Industries bill by State department of Youth Affairs and Creative Economy (2024) - Creative Economy Support bill by the Ministry of Trade (2024) While the presence of these varying interests highlights growing recognition for the need for supportive policies in the creative sector, there is a need to consolidate ongoing policy initiatives in order to have a unified, consolidated policy and legislative framework that will benefit the industry. This not only provides the necessary clarity and stability for investors but also encourages innovation, protects consumers, facilitates partnerships, aligns with national goals, and promotes market expansion.

Key sub-sectors in Kenya's creative ecosystem

The creative industry in Kenya is made up of a number of unique sub-sectors as highlighted earlier. The table below shows the range of industries that have been included within the definition of the creative industry used in different studies. Our focus in this report is on those sub-sectors that have specific financing needs or product cycles that are unique to the creative industries and require distinct support requirements that differ from the business development or financial services used by other forms of professional services. **We also focus on which industries have economic development potential by way of being a digitally tradable service, as well as those highlighted as being the key creative sub sectors in Kenya by stakeholders interviewed.**

Table 2: Classification of creative industries[6]

Creative industries	DCMS (2009)[7]	WIPO copyright industries (2003)[8]	Eurostat LEG (2000)[9]	KEA European Affairs (2006)[10]	UNCTAD (2010)[11]	European Parliament (2016)[12]	NESTA (2015)[13]
Printing		×			×		
Publishing	×	×	×	×	×	×	×
Advertising and related services	×	×	×	×	×	×	×
Architecture and engineering	×	×	×	×	×	×	×

[6] The Economic Impact of the Creative Industry in the European Union, Drones and the creative industry. Available here

[7] Creative Industries Economic Estimates Statistical Bulletin 2009, DCMS. Available here

[8] Guide on Surveying the Economic Contribution of the Copyright-Based Industries, WIPO. Available here

[9] Cultural statistics in the EU, LEG Eurostat. Available here

[10] The economy of culture in Europe, KEA. Available here

[11] Creative Economy, UNCTAD. Available here

[12] Report on a coherent EU policy for cultural and creative industries, European Parliament. Available here

[13] Creative economy employment in the EU and the UK: a comparative analysis, NESTA. Available here

Arts and antique markets/trade	×	×			×		
Crafts (artistic)	×	×	×	×	×	×	
Design/specialised design services	×	×	×	×	×	×	×
Designer fashion and high-end industries	×	×			×	×	
Film/motion picture and video industries	×	×	×	×	×	×	×
Music/sound recording industries	×	×	×	×	×	×	×
Performing arts (theatre, dance, opera, circus, festivals, live entertainment)/independent artists, writers, and performers	×	×	×	×	×	×	×
Photography	×	×	×	×	×	×	×
Radio and television (broadcasting)	×	×	×	×	×	×	×
Software, computer games and electronic publishing	×	×	×	×	×	×	×

Heritage/cultural sites (libraries and archives, museums, historical and heritage sites, other heritage institutions)			×	×	×	×	×
Other visual arts (painting, sculpture)			×		×	×	×
Copyright collecting societies				×			
Cultural tourism/recreational services				×	×		
Creative R&D					×		

Highlighted above in green are the key creative sub-sectors that form the core of this analysis.

Size and characteristics of key creative sub-sectors in Kenya

The growth of the creative sector in Kenya is plagued by a number of challenges that impact the whole value chain. This ranges from negative attitudes towards the creative sector; a lack of clear linkage between the education system and the cultural industry; poor protection of intellectual property; underdeveloped cultural infrastructure and institutions; and a lack of statistical data on the actual performance and diversity of the creative industry.

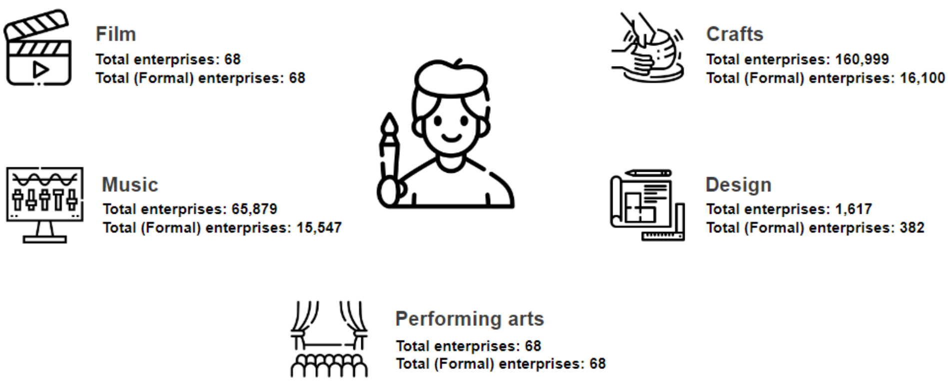
The following sizing analysis seeks to quantify the formal opportunity size in key sub-sectors of Kenya's creative ecosystem. This is vital as it provides a lens through which initiatives and recommendations can be prioritised for the greatest impact. Nonetheless, the sizing is conservative, as there are likely to be a large number of content creators and informal influencers not captured through official data sources.

As a starting point, we utilised the Micro, Small and Medium Enterprises (MSMEs) survey released by the Kenya National Bureau of Statistics (KNBS) in 2016 to find the estimated split between formal and informal enterprises within the creative sector.[14] According to the MSME survey, there are 13,900 licensed enterprises under "Arts, entertainment and recreation" with 45,000 unlicensed enterprises - **indicating that licensed creative MSMEs make up approximately 23.6% of total creative enterprises**. While this total estimation in our view is an underestimation, we utilise the split to derive the total number of informal enterprises within each creative sub-sector.[15]

In engaging with creatives a number of drivers of informality were identified. Primary amongst the identified drivers of informally was a general misconception about the viability of creative practice as a career. This may be attributed to a general lack of understanding of the viability of the sector, and limit the extent to which creatives pursue their practice as more than a hobby. Other factors that drive informality in the sector include fears of taxation and few incentives to formalise.

Thereafter, we take into consideration historic population and MSME growth, and using existing publications and databases, we estimate the total number of enterprises per key creative sub-sector in 2024.

Figure 1: Total number of formal and informal creative enterprises in key sub-sectors (2024)



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[14] Micro, Small & Medium Establishments Survey 2016, KNBS. Available here

[15] New business models for financing the creative sector, FSD Kenya 2021. Available here

Further detail on the sizing methodology for each of these key sub-sectors is contained below.

- **Music** - There were 13,967 artists registered with the MCSK in 2019; assuming an average number of 20 artists per studio, this yields 698 studios. Applying the formal-informal split dictated by the KNBS MSME survey, we estimate 47,475 informal enterprises bring the total number of enterprises within this sub-sector to 65,879, when accounting for population and MSME growth. **It is worth noting that most artists are also live performers and so have been primarily allocated to this sub-sector**.

- **Film** - As highlighted above, the capital requirements to participate effectively within this sub-segment are high. Additionally, most enterprises within this sector need to be registered to access most shooting sites, participate in national/international festivals/competitions and hire/pay freelancers. **There were 64 Film/Motion capture enterprises registered on KFTV in 2021, a site that tracks local production companies to provide production logistics and resources to international crews**, which we have adjusted to 68 to take into account SME growth in Kenya. Despite the fact that there are few registered local production companies, technology has drastically reduced the barriers to entry in developing film or video content. There are a large number of young creatives, influencers, and filmmakers that are not captured in this sizing. The size of this informal market is evidenced through the rise of content dissemination platforms both globally, such as through Netflix, Youtube and Tiktok, but also locally through platforms such as Safaricom's video-on-demand platform, Baze.

- **Crafts - This sector comprises mostly informal enterprises**. Kariokor market in the capital of Nairobi is home to around 7,000 workers with makeshift sheds and workshops. Taking this as a proportion of the Nairobi population and then applying this to the entire Kenya population and adjusting for population growth, we estimate that there are 160,999 enterprises in total across the country.

- **Design** - Due to an acute shortage of information regarding this sub-sector, estimations may severely underestimate the total number of design enterprises. According to the Kenya Business Directory, there were 360 companies registered in the design category in 2021. Assuming all these are registered and assuming historical trends for MSME and population growth continue; using the formal-informal split, we estimate 1,235 informal enterprises. **It is worth noting that, due to limited public data available, this estimation does not include freelance graphic/visual/interior designers**.

- **Performing arts -** As with the film industry, capital requirements within the performing arts sector are high. As such, the space is likely entirely made up of registered enterprises. We have assumed that the total number of performing arts enterprises is equal to that of film. Given the similarity in challenges faced across both sectors, and the limited number of venues for performing arts shows, there are likely few existing enterprises within this sub-sector. **This estimation excludes individual performing artists (such as musicians already included in the music sub-sector estimation) and live performance companies.**

This market estimation seeks to showcase opportunities for growth in the creative sector. Despite this conservative estimate, we expect the number of influencers and content creators to be much higher. However, data limitations hinders the precision at which this market can be estimated. Through this sizing, we provide a conservative estimate of the number of creative enterprises across the key sub-sectors. This view is informed by available information, however, given the informal nature of creatives and more recent rises in the number of digital content producers, it is likely that there is a much larger population of informal creatives uncaptured by existing data sets.

The next table provides a more detailed breakdown of the structure and an overview of needs of these identified key sub-sectors across the value chain.

Table 3: Business characteristics of key sub-sectors by the value chain[16]

Overview	Entry criteria	Summarised Development needs	Distribution challenge	Sample digital platforms

[16] New business models for financing the creative sector, FSD Kenya 2021. Available here

Crafts - An important source of revenue for many small businesses, who are often informal	The entry criteria for the crafts sector is low - participants typically come from rural communities and run small businesses	Distribution platforms and business management skills training, digital access to more markets	Access to retail channels remains a challenge. However, the crafts sector in particular experiences synergies with tourism	1stdibs Etsy Amazon Alibaba
Design/ specialised design services - An increasingly traded service online for young creatives	The entry criteria for the design sector is medium, participants need access to design tools	Participants need access to design training, mainly individuals and small businesses. Access to digital tools and software platforms is expensive	Access to and awareness of opportunities is a challenge for design businesses	Hustle Sasa Freelancer Upwork Skillshare
Film - A highly specialised industry with relatively high financing needs	High entry criteria with complex industry with significant capital and project-related financing across the value chain.	Smartphones lower entry criteria for the film sector, as these tools become more sophisticated. Access to affordable/free equipment including smartphones is the key barrier	Access to distribution networks and B2B relationships. Access to digital distribution platforms and cinema networks, as well as frequency of film showcases (film screenings, festivals, etc.)	Social media platforms Netflix Showmax HBO Hulu Disney+ Local TV
Music - A highly specialised industry with modest financing needs	A highly specialised industry with modest financing needs	Access to affordable/free equipment. Distribution of musical content also requires financing	Streaming platforms have enabled artists to distribute globally, however distribution and access to these platforms requires financing for marketing, partnerships, etc.	Spotify Deezer Soundcloud

				Audiomack Boomplay Mixcloud Apple Music
Performing arts - Limited market, with inputs into various other sub-sectors	A moderate entry criterion, with the key barrier being access to spaces and venues. Stage Venues are critical for the monetisation of theatre productions.	Actors and performers work within the confines of a play or production requiring other players. Availability of venues and the creation of vehicles to employ stage and theatre actors	Access to physical distribution spaces (such as theatres) for the production, and exhibition of performing arts is required for commercialization. Recent initiatives by the french embassy project CASiK or Creative Art Spaces in Kenya aimed equip theatre spaces in Kenya	Facebook Youtube Instagram Patreon

The following analysis aims to unpack the various learning agenda questions and their implications in Kenya's creative sector. This will pay special attention to the identified gaps and challenges of the ecosystem. The analysis begins with a review of the systemic barriers, while further sections aim to drill into specific learning agenda questions such as those on technology, job decency, and gender differences.

Analysis of systemic barriers

Systemic barriers in the creative sector touch on a number of lenses. **These may include barriers to the enabling environment, to funding, to skills development and training, and/or to the physical and virtual infrastructure required for creatives to thrive.** Outlined in this section are the key challenges and systemic barriers that exist across these dimensions.

A: Infrastructure barriers

Infrastructure as a pillar of the innovation ecosystem encompasses both physical and virtual solutions that promote the ability for innovation to occur and enable creative and knowledge economy actors to produce high quality outputs. Investment in these solutions is crucial for ecosystem development, as they support the acquisition and dissemination of knowledge.

Infrastructure has broadly been grouped into two key components: physical infrastructure and virtual infrastructure. **Physical infrastructure refers to the tangible elements that support innovation, such as buildings, equipment, and connectivity networks**. These physical assets provide the foundation for creative activities, enabling access to essential resources and facilitating collaboration. On the other hand, **virtual infrastructure refers to the intangible elements that facilitate innovation, such as digital platforms, software, and online communities**. These virtual assets enable access to information, knowledge sharing, and online collaboration, transcending geographical boundaries and expanding opportunities for creatives.

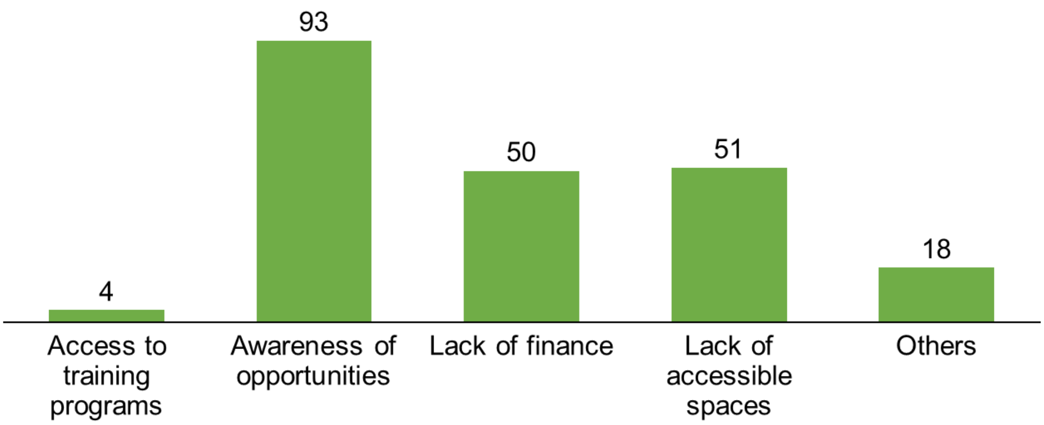
Stakeholder interviews suggest a dearth in physical infrastructure for creative output. This includes access to high quality equipment, as well as access to theatres and art centres particularly used for performing arts. 35% of surveyed creatives attribute their exclusion from opportunities to a lack of access to tools, equipment and the necessary skills. This further highlights the need for high quality tools and equipment in the industry.

Some innovation hubs play a pivotal role in addressing this gap by providing a physical space for collaboration, networking, and access to resources; these hubs empower creatives to connect with like-minded individuals, exchange ideas, and access essential tools and technologies. This collaborative environment not only stimulates creativity and innovation, but also facilitates knowledge sharing, skill development, and mentorship opportunities, ultimately contributing to the growth and success of individual creatives and the creative industry as a whole. **In terms of the number of innovation hubs, Kenya ranks 4th regionally with 50 registered hubs,**

behind Egypt, South Africa and Nigeria (90 hubs).[17] Although existing hubs and centres providing space for collaboration and networking are distributed across the country, they are not uniformly distributed across urban and rural areas, with approximately 38% of all innovation hubs concentrated in Nairobi alone.[18] In addition, stakeholder interviews suggest that few hubs are focused on creative sub-sectors.

While physical infrastructure has seen advancements, the virtual infrastructure landscape remains a hurdle for many creatives. Some platforms such as Hustle Sasa exist to help creatives and entrepreneurs connect and sell directly to their audiences. Through these types of digital platforms, key problems of access to markets, and more broadly, awareness of opportunities, are being solved for.[19] This challenge is further evidenced by the most frequent challenges faced by survey respondents - indicated below.

Figure 2: Most frequent challenges faced by survey respondents[20]



[17] Mapping the Innovation Ecosystem in Kenya, UNDP 2023. Available here

[18] Mapping the Innovation Ecosystem in Kenya, UNDP 2023. Available here

[19] Hustle SASA. Available here

[20] CFYE Creatives survey, 2024.

Adoption of modern technology to drive the virtual infrastructure environment could present more successful alternatives to previous conventional approaches. The GoK through KEPROBA has adopted digital platforms such as the "makeitkenya" export promotion e-platform. Platforms such as MakeitKenya are vital to supporting enterprises, however, stakeholder interviews suggest that knowledge and awareness of similar opportunities to access global markets is still lacking in the majority of the market.

Kenya has made significant strides in expanding access to essential physical infrastructure such as electricity, broadband, and mobile networks, with relatively broad mobile adoption, evidenced by widespread use of mobile money amongst its population as a result of players. Access to electricity and broadband penetration have significantly improved, with access to electricity for the total population in Kenya reaching 75% in 2022. Despite progress, there remains a significant rural-urban divide: 98% of the urban population have access to electricity, compared to only 65.5% of the rural population.[21] In terms of broadband penetration, a 2019 census report revealed that rural internet access was 13.7%, compared to 42.5% in urban areas.[22] For the entire population, the World Bank reports internet usage by a mere 29% of the population, with fixed broadband subscriptions at a meagre 1.48 per 100 people in Kenya.[23] Summarised below are the key systemic barriers identified in the infrastructure environment. These constraints are used to develop recommendations in the subsequent recommendations section.

[21] World Bank Data, 2023. Available here

[22] Kenya Population and Housing Census, KNBS 2019. Available here

[23] World Bank Data, 2023. Available here

Table 4: Key systemic barriers in creative ecosystem infrastructure

Key constraint	Description
Bridging the divide between rural and urban development	Across key infrastructure such as electricity, access to internet, and access to creative hubs, there appears to be a gap between what is available in urban cities when compared to what is available in rural cities. This impacts the use of digital tools and technologies, stifling access to resources, and in turn, creativity and the production of creative content. **Limited infrastructure in rural areas restricts local creators from utilising essential digital tools for content creation, distribution, and monetization, stifling their potential to reach wider audiences and collaborate with peers globally.**
Affordability of data costs	**Data affordability is a critical barrier to engaging in digital activities and accessing digital services for creativity. High data costs also restrict access to essential digital tools and platforms for content creation, distribution and promotion.** Making mobile data more accessible and affordable is key to ensuring participation in the digital and creative economy, particularly for lower income users.
Access to and affordability of high-quality digital equipment	**Smartphone adoption lags behind basic feature phone ownership, with lower rates particularly in rural areas. Costs also remain high compared to other countries in the region, making it inaccessible to many Kenyans.** Smartphone adoption specifically limits creatives in the content creation, music, photography, videography, digital art and film sub sectors where smartphones are essential tools for production and distribution. Broader than smartphone adoption, is also the need for high quality creative equipment (including high quality smartphones). These are often costly to the creative but are increasingly important for the creative to produce content that is up to the global market standard. **Availability of high quality digital also impacts organisations offering training programs as it was noted that equipment used to train creatives may not be up to market standards**.

Overall, the infrastructure driving Kenya's creative economy has seen a lot of effort put into its development, however, scaling these to the next level and ensuring sufficient access across all counties in the country is important. This particularly applies to access to physical spaces and high quality equipment, where in key creative sectors such as the film, performing arts, and music ecosystems, there is a strong need for these to develop high quality output.[24]

B: Policy barriers

The creative industry benefits from a strong political willingness for growth. The development of the National Creative Economy Policy outlines a cohesive national strategy aimed at fostering growth, innovation, and sustainability within the sector.[25] However, stakeholder interviews suggest that this interest may be working adversely, as **creative sector related functions and mandates are spread across a number of various government ministries**. This results in difficulties coordinating the various activities, may result in duplication of efforts, and ultimately make it more difficult to execute a cohesive national strategy for the sub-sector.

A key constraint identified in the Creative Economy Policy are gaps in enabling policies and legal frameworks that produce barriers to economic empowerment and hinder the industry's overall growth and potential[26]. **Policies hold a strategic value in setting incentives for IP generators and regulation assure the sector of legal protection for their creative works. The lack of incentives set in policies deter domestic and foreign investment from committing resources to the creative sector**. Legislative lacunas or inadequacy of IP laws whether in the form of recognition of IP rights or inadequate protection of intellectual property rights is a pressing concern. IP generators face added risks of copyright infringement, piracy, and plagiarism. These issues not only result in a loss of income but also serve as discouragement for further innovation within the creative industry[27].

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[24] CFYE Stakeholder Interviews, 2024.

[25] Kenya Creative Economy Policy, 2023. Available here.

[26] Kenya Creative Economy Policy, 2024. Available here

[27] Kenya Creative Economy Policy, 2024. Available here

Stakeholder engagements by Genesis Analytics with county-level regulators further suggest that, while substantial progress has been made at the national level in developing a comprehensive strategy for the creative economy, a significant gap remains at the subnational or county level. **There is a need for the development of strategies, initiatives, and policies to be translated into actionable measures that can be effectively implemented across all counties, ensuring a cohesive, countrywide impact that touches on Kenyan creatives across the entire country.**

Stakeholder interviews further suggest that while the development of the national creative policy is a net positive, the policy does not sufficiently take into account feedback from the creatives themselves, and further, has no clear structure to receive feedback from operating creatives. This is due to a perception of poor coordination between the National Government and various government agencies, and results in the development of policies that do not fully take into account the needs of the practising creatives and stunts the rate at which the positive effects of policies reach local creatives.

This is further supported by the perceived outdated nature of sub sector-specific policies. Stakeholder interviews specifically cite the mandates of the Kenya Films and Stage Plays Act and the Kenya Film Classification Board to be outdated.[28] **In addition, stakeholder interviews further cite recent challenges with the proposed tax schemes for creative products. Given the relatively nascent nature of the ecosystem, it begs the question of whether the proposed tax schemes are of long term benefit to the industry, or whether they hamper its growth**. This is driven by the perception that an unflattering tax environment makes creative production expensive.

[28] CFYE Stakeholder interviews, 2024.

Figure 3: Suggested enabling policies from survey respondents[29]

"A platform to see what opportunities exist"

"Minimise the complexity of regulatory requirements such as business name registration"

"Appoint experienced creatives when designing policies and training programs"

"Free access to government facilities for creative production"

"Provide tax breaks and incentives to encourage growth in the sector"

The size of the text above reflects the frequency of responses.

Summarised below are the key systemic barriers identified in the enabling policy environment. These constraints are used to develop recommendations in the subsequent recommendations section.

Table 5: Key systemic barriers in the enabling environment

Key constraint	Description
Coordination between various Government ministries	There exists a number of ministries that oversee various elements of the creative sector. For example, the Ministry of Gender, Culture, Art and Heritage, the Ministry of Youth Affairs, Creative Economy, and Sport, as well as the Ministry of ICT and Digital Economy all have functions that are relevant to the creative economy. This fragmentation makes it difficult to coordinate and may result in duplication of efforts and difficulties in extracting the value from a cohesive national strategy.

[29] CFYE Creatives survey, 2024.

Lack of county and sub sector specific creative policies	While the 2010 constitution has devolved cultural activities from the National government to the 47 county governments, there is a notable absence of coordination and clear guidelines at the county level to promote innovation and entrepreneurship. While national strategies provide overarching frameworks, there is a need for localised and sub-sector specific policies that address the unique challenges and opportunities within each county and each subsector. The lack of these focused policies hampers the growth of grassroots innovation, local ecosystems, limits support for creatives and restricts the development of regionally relevant solutions.
Lack of meaningful public participation in policymaking	An evaluation of Kenya's innovation ecosystem, based on interviews with various county-level government agencies, revealed significant gaps in the policy development process. There is a lack of participation from meaningful ecosystem stakeholders in the definition of policies and regulations, leading to the enactment of policies that are misaligned and with the practical needs and challenges faced by innovators and creatives.
Tax-centred innovation policy	Policy incentives in the digital innovation and creative industries are limited to startups and innovators operating in Special Economic Zones. There is the perception that the regulatory framework around innovation is more tax-centred than incentivizing. A focus on tax systems for the creative sector in its nascent stage of development may have adverse effects on the growth of the sector.

Overall, government initiatives have been increasingly supportive of the creative sector. This effort is vital to shifting mindsets, and encouraging awareness of the industry, which are vital to its growth. Nonetheless, key gaps remain, and the need for cohesion, more recent sector specific policies and initiatives, as well as a long term view to encouraging the development of the sector through tax and incentives structures that work for the creatives are necessary for the long term development of the ecosystem.

C: Barriers imparting skills development and education

Stakeholder interviews suggest that in the creative ecosystem, a number of participants are primarily self taught. There are some formal entities, training or qualifications catered to the Kenyan creative, although a number of creatives are noted to be self taught due to issues of access or affordability.

To this end, the government of Kenya sought to ensure increased absorption of informally trained individuals in the workforce through the Recognition of Prior Learning (RPL) policy framework, which seeks to recognize informal education and learning as a measure of competence. While this may not yet cover all sectors of the creative economy, it is a vital first step towards incorporating the expertise of informally trained digital and particularly creative experts is vital for ensuring education material is kept up to date, and thus, the skills of the populace are kept in line with the demands of the industry. Since then, the Government of Kenya has additionally introduced the Competency-Based Curriculum (CBC) to develop a globally competitive workforce by focusing on practical skills at the primary and secondary level of education.

The CBC places a strong focus on developing skills and knowledge that students acquire through practical experiences; however, **formal education and training have ultimately struggled to meet some of the fast-changing labour market needs, particularly where digital innovation and technology are required**.[30]

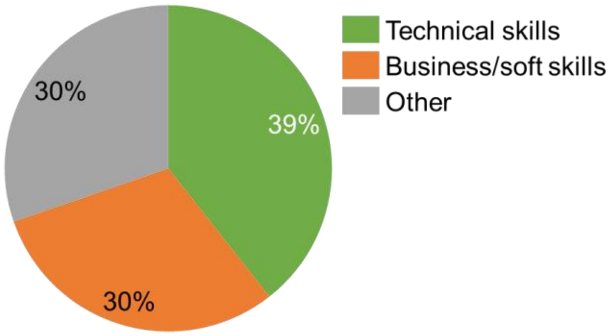
Some specific challenges reported by the TVET Authority in Kenya include intermittent internet connectivity for staff and students in regions with 2G or 3G cellular networks, which affect download speeds on off-campus computers and mobile devices. **Students and staff also had concerns about the high cost of digital equipment and internet connectivity, which limits the number of participants and the relevance of the skills they are being taught**. Limited access to computers while at home, frequent electricity blackouts, ICT literacy skills and, high cost licences for operating systems are also key challenges noted.[31] These challenges are compounded by under-resourced training institutions. As training institutions struggle to ensure that the most relevant skills are taught, they are noted to have difficulties keeping up with changes in technology and ensuring that the most state-of-the-art technology

[30] Kenya 10 year innovation masterplan, 2023. Available here

[31] UNESCO, ICT Talent Cultivation for Kenya's digital economy, 2022. Available here

is used for education programs. **Highlighted below are skills that survey respondents indicated they required.**

Figure 4: Required skills indicated by survey respondents[32]



Survey respondents indicate that technical skills development opportunities were most in demand by creatives. These include skills such as coding, content creation, graphic design, editing and film skills. As highlighted above, existing skills development players are under-resourced which hinders their capacity to provide cutting edge technical skills. It was also noted that the sources of skills development initiatives were not always clear to creatives.

Soft skills were also noted to be of importance to creatives. Specific soft skills required as identified in the creatives survey include entrepreneurship skills, negotiation and business management skills, proposal writing, and other marketing skills.[33] The third category highlights other sub-sector specific skill requirements such as in crafts, performing arts, or music.

Stakeholder interviews reinforce the criticality of soft skills amongst creatives. Soft skills are defined as nontechnical and non-industry-specific skills applicable to a wide range of tasks across many roles and professions, including interpersonal skills or "people skills" that enable individuals to work effectively in groups and

[32] CFYE Creatives survey, 2024.

[33] CFYE Creatives survey, 2024.

organisations.[34] Amongst survey respondents, the most required skills were technical skills, with soft skills following closer behind. This is further supported by interview findings suggesting that most creatives are self taught - suggesting that the gaps exist in the access to and quality of formal learning opportunities for creatives. These are often driven by resource constraints on both the creative and the skills development programs.

While a number of players provide skills development programs that address these needs for young creatives, there is little industry cohesion to harness these skills for a wider population. On the regulatory side, players such as the Kenya Film Commission, the Music Copyright Society of Kenya, and the Kenya Fashion Council support creatives in their respective sub sectors, while other donor and private sector players offering skills development programs include studio BelaBela (Mombasa), the British Council, HEVA Fund, Goethe Institute and Alliance Française.

It was noted that the key challenge here was in the fragmentation of skills development programs and initiatives in Kenya. There are noted to be a number of skills development implemented by donors, private sector players, and public sector agencies, however, a number of these initiatives operate in silos, and have little coordination with each other in terms of the skills being taught and the drive for general market awareness.[35]

The centralisation of skills development programs and opportunities is a key step to enhancing awareness, uptake, and coordination of the various activities ongoing within the ecosystem. A centralised platform that maintains an ongoing repository of available training programs across a range of topics including but not limited to technical training, business and financial management training, and negotiation training, is valuable because it enhances coordination amongst providers of these programs, as well as facilitates awareness for creatives.

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[34] Britannica, 2024. Available here

[35] CFYE Stakeholder interview, 2024.

In addition to this, the same approach can be used to platform market opportunities. **Stakeholder interviews suggest that the market is prone to *gatekeeping* - the activity of trying to control who gets particular resources, power, or opportunities, and who does not. The systems that allow for public access to market opportunities, and the incentive structures that drive its use, may work to curtail this behaviour**.

The level of industry-university collaboration is also generally considered weak, with few concrete outputs such as commercialization or research.[36] This is exacerbated by a lack of involvement from industry in the development of curricula, with the outcome that teaching practices and content don't align to industry needs. This misalignment is coupled with slow curriculum approval processes and a lack of industry-experienced faculty.

Summarised below are the key systemic barriers identified in skills development for creatives in Kenya. These constraints are used to develop recommendations in the subsequent recommendations section.

Table 6: Key systemic barriers in skills development

Key constraint	Description
Fragmented skills development efforts	There are a large number of skills development programs in Kenya. These are offered by a wide variety of private and public sector players, as well as donor institutions. **However, stakeholder interviews suggest that these programs lack the level of cohesion to truly create the most impact on Kenyan creatives**. Multiple ministries, agencies, and programs often work independently, leading to overlaps in training and skills development programs. This fragmentation not only wastes resources but also confuses creatives, ultimately diluting the effectiveness of government intervention.
Soft skill gaps	Stakeholder interviews highlight the passion-driven nature of Kenyan creatives. While necessary, it is highlighted that this is not always balanced by a sense of professionalism amongst creatives. **It was noted that a number of**

[36] UNESCO, ICT Talent Cultivation for Kenya's digital economy, 2022. Available here

	creative practitioners have the passion and technical understanding of their creative practice but lack the business management and financial management skills required to grow their creative enterprise. These skill gaps specifically revolve around negotiation and networking skills, contract management, and general business management skills.
Misalignment between industry requirements and skills development programs	**A key challenge noted is a misalignment between what is being taught in skills development programs and what is required by the industry**. This is further driven by the fast-changing nature of technology, limited understanding of the creative sector, and the slower rate of curriculum revisions in the education sector. Compounding this challenge on the supply side is the difficulty and cost of obtaining recent ICT equipment (e.g. cameras and film equipment) that can be used to teach relevant, future-focused, digital and creative skills.

Overall, the skills development initiatives for Kenya's creative ecosystem are in their foundation phase. This is driven by the series of initiatives being implemented that support both the supply and demand of creative skills, but the relevance and future focused nature of these programs remain in question. Key gaps remain in the form of weak industry-academia collaboration, which results in a misalignment between what is being taught in schools and the needs of the industry.

D: Barriers impacting access to finance

The table below examines the value chain of creative output, and summarises the key characteristics of creative businesses, their unique financial needs, and the resulting likely sources of finance.

Table 7: Finance supply across the creative-based value chain[37]

	Creation	Production	Dissemination	Exhibition

[37] New business models for financing the creative sector, FSD Kenya 2021. Available here

Characteristics	• Youth • Individual or informal sole proprietor • Limited asset endowment	**Established enterprise** • Large corporate • Formal business • Fully paid equipment (though may be out of date) • Premises **New enterprise** • MSME • Rented/ Leased equipment • Rent space	**Traditional** • Medium to large corporate • Formal business • Established premises **Local ICT** • Formal and informal MSME **Large multinational corporation** • Registered outside of Kenya **Digital** • Local and international platforms	**Established enterprise** • Medium to large enterprises with exhibition premises - galleries, theatres, concert halls • Formal, well-capitalised business
Demand for financing	• Day-to-day needs/ consumption • Transportation • Laptops/ Phones • Supplies &	• Equipment • Property/ Studios • Software • Vehicles	• Working capital • Software	• Property • Working capital

	expenses	• Working capital		
Current sources of financing				
Debt	• Personal loans • Mobile money loans	• Asset finance • Mortgages • Cash flow lending/ trade finance	• Government SME credit guarantee scheme	• Commercial loans • Asset Finance • Mortgages • Cash flow lending/ trade financing
Equity	• Crowd-funding	• Venture capital • Private equity • Capital markets • Crowd-funding	• Venture capital • Private Equity	• Venture capital • Private Equity
Informal	• Personal savings • Family/ Friends • Busking	• Personal savings • Family/ Friends	• Personal savings	N/A

As per the table above, some key emerging insights are as follows.

Private capital, including venture capital (VC) and private equity (PE), has increasingly flowed into Kenya's start-up scene. Over the last five years, the amount of private capital raised by Kenyan startups has escalated dramatically, from USD 40 million in 2017 to a total of USD 1.5bn between 2019 and 2023.[38] This ranks Kenya third in terms of PE transactions in SSA, behind South Africa and Nigeria.[39] **These funds however typically invest in technology, FinTechs, agribusiness, healthcare, transport and logistics, renewable energy, and e-commerce, and not necessarily in the creative sector.**[40]

This is noted to be as a result of informality in the creative sector. High levels of informality are likely to lead to undocumented contract arrangements, and payment in cash or mobile money. This translates to limited visibility or bankability. Similarly, revenues of artists vary widely with established and popular artists/ creators able to draw in large revenues, but the vast majority of creators living on very low revenues. In the music industry, in particular, there are huge returns to global success, but many artists with this potential struggle to survive in the industry long enough to reap these rewards.

Access to finance nonetheless is one of the most widely noted challenges that impede growth of creative enterprises in Kenya[41]. Lagging just behind awareness of opportunities, access to finance from various sources such as banks, private capital firms, donors, and government interventions, are particularly important. While some creative sub-sectors such as film are noted to have received more investments, **generally, creative businesses are perceived to be low income, and not adequately understood by financial institutions**.

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[38] AVCA, African Private Capital Activity Dashboard, accessed September 2024. Available here

[39] Private Equity in East Africa, DLA Piper Africa website, accessed in December 2021

[40] JdSupra, 2021 Venture Capital Guide - Kenya, 2021. Available here

[41] CFYE Creative Survey, 2024.

Creatives and the businesses they support across the value chain may not typically have the skills to effectively communicate a clear business plan on how they will monetise their creativity. This may have a knock-on effect across the value chain, resulting in a perceived low return on investment. This coupled with limited historical data on the industry make it difficult for financiers to value the opportunities and risk adequately. Moreover, stakeholder interviews suggest that creatives are particularly poor at dealing with matters of financial and business management.

On the supply of financing products, traditional financial institutions often lack the expertise to accurately value IP, preventing creatives who may not have access to other forms of collateral, from using their IP as collateral to secure loans. In addition, stakeholder interviews suggest that there is additionally a trust issue that is driven by perceived inconsistency when engaging with creatives.[42] This is driven by a lack of understanding of the sector itself and how it works, ultimately resulting in a lack of suitable financing products for creatives. **Access to traditional collateral assets of land and vehicles may be limited amongst creatives. Creatives' use of alternative assets such as cameras, laptops and software, though critical to their trade, may not be valued or understood by financiers**. As a result, financiers have not attempted to tailor asset financing products for these specific assets, or would not accept them as collateral for additional loans. While traditional banks are yet to embrace the sector, there is some interest from SACCOs and MFBs who work with creatives, have sight of their transactions, and are building the basic blocks and understanding to offer financial solutions that work for Kenyan creatives. Stakeholder interviews however note that the skills and understanding of the creative sector may be limited amongst loan officers themselves, suggesting a need for capacity development and awareness in this regard.[43]

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[42] Genesis Analytics Stakeholder Interview, 2024.

[43] CFYE stakeholder interviews, 2024.

Figure 5: Voice of the creatives - Access to finance[44]

"Finance management is a needed skill for me to grow my creative practice"

"More involvement from the government to finance young creatives is required"

"Access to finance is my biggest problem with accessing technology tools that will help me grow my practice"

The size of the text above reflects the frequency of responses.

On the demand side, the relative level of informality amongst creatives and the lack of soft skills such as negotiation skills, contract management and business management skills limit uptake of available financing interventions. Creatives tend to require greater support in navigating business complexities, but stakeholder interviews suggest that these skills are difficult to find training opportunities for. As highlighted in the challenges experienced by creatives currently, it appears that awareness of sources of funding, skills development, or other career opportunities is lacking.

On the regulatory side, there are noted to be a number of government led financing initiatives for startups and entrepreneurs. However, these resources are not easily accessible to creatives, and few are targeted at them. Awareness of these funding resources is noted to be a challenge, while at the same time, government funding initiatives appear fragmented, with duplicated efforts among various governmental entities.

[44] CFYE Creative Survey, 2024.

Summarised below are the key systemic barriers identified in accessing finance for creatives in Kenya. These constraints are used to develop recommendations in the subsequent recommendations section.

Table 8: Key systemic barriers in access to finance

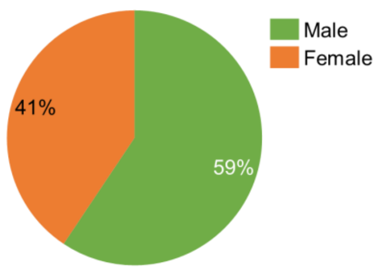
Key constraint	Description
Limited historical data to inform financing decisions for the creative sector	Stakeholder interviews with financiers suggest that the creative sector is new, and as such, there is limited data on the activities of creatives that banks and other finance providers can use to develop solutions. The lack of data further suggests that investors may not be aware of the level of attractiveness that is in the creative ecosystem. **A crucial step in bridging this divide is in facilitating greater collaboration between financiers and creatives to bridge the gap in understanding, as well as in the collation of data on creative enterprises**. On the financial service provider side, this also includes the identification of creatives and the trends in their payment and savings data, as well as the sensitization of loan officers to the nuances of the creative sub-sectors e.g. financing models in film and what repayment tends to look like.
Weak IP Leverage Mechanisms and misunderstanding of creative businesses	Intellectual property (IP) is a valuable asset for many startups and creatives. However, in Kenya, **the mechanisms to leverage IP for financing are weak. Financial institutions often lack the expertise to accurately value IP, preventing startups from using their IP as collateral to secure loans**. This gap denies startups a crucial avenue for unlocking capital based on their intangible assets. Additionally, there is a lack of awareness and understanding among entrepreneurs on how to protect and monetize their IP, further limiting their ability to leverage these assets in financial negotiations.

Overall, access to finance for Kenya's creative sector is very nascent, with few solutions catered to the market and limited awareness of existing solutions. There are skills gaps that exist on both the demand and supply side of financial products that serve as systemic barriers, and on the regulatory side, the current structures do not appear to do enough to incentivize creative businesses.

Analysis of gender mainstreaming and inclusiveness

Kenya stands well above its neighbours on the World Bank Group's *Women, Business and the Law Index* scoring 80.6 out of 100 compared to the regional average of 72.6 observed across Sub-Saharan Africa, and higher than the average score for Eastern and Southern Africa at 74.1.[45] The dataset offers objective and measurable benchmarks for global progress toward gender equality. Comparable across economies, the data is useful for research and policy discussions on improving women's economic opportunities. **Kenya's creative industry, while vibrant and promising, presents a complex landscape for marginalised groups**. These groups, including women, persons with disabilities, and individuals from marginalised communities, face unique challenges that hinder their full participation and success.

Figure 6: Gender split of survey respondents



Despite Kenya's progress in gender equality, disparities persist within the creative sector. Women often encounter limited access to funding, mentorship, and decision-making roles. Societal expectations and biases further restrict their opportunities, particularly in male-dominated sub-sectors. Despite this progress when compared to the rest of the region, Kenya still suffers from a gendered disparity, prominent across various sectors and tiers of development. The gender disparity is almost prominent in schools - with the gross enrolment ratio for formal tertiary education is 20.48%, with a significant disparity between men (23.04%) and women (17.99%). In the ICT sector specifically, there is an inadequate number of graduates compared to industry demand, however, this level of data is unclear for the creative sector. Creative survey findings appear to

[45] Women in Kenya enjoy 81% of the legal rights of men, World Bank 2023. Available here

indicate that while a gender disparity appears to exist, it is not the largest driver of marginalisation.

Figure 7: Voice of the creative - Drivers of marginalisation[46]

The size of the text above reflects the frequency of responses.

Stakeholder interviews confirm that Kenya is a relatively patriarchal society and so the creative industry experiences the challenges that come with this. For example, male and female musicians may be offered differing privileges, accolades, payment, and contract terms. Amongst female respondents, the largest single percentage of respondents (~5%) indicated that they experience marginalisation due to their gender. This was closely followed by location and age. Nonetheless, 74% of surveyed respondents cite a lack of opportunities as a result of discriminatory practices, while 35% report having experienced unequal treatment for a variety of reasons.

In addition to the gender disparity, creatives surveyed also indicate other drivers of marginalisation - most prominently being the location of the creative, particularly amongst male respondents. This reinforces the highlighted challenge of a gap between services and support available in urban locations when compared to rural locations. **This reinforces the point that there is a need for widespread initiatives across all counties and regions to harness the power of the creative sector.**

[46] CFYE Creatives survey, 2024.

Another interesting data point to note here is a stated high level of competition for perceived few opportunities. 44% of survey respondents state that there are fewer opportunities, which is noted to be more prominent for survey respondents who identified as part of a marginalised group. Stakeholder interview findings support this argument, suggesting that this has resulted in "opportunity gatekeepers." There appears to be a need for a democratised process of providing creatives with access to various opportunities, and this may be particularly prominent for marginalised groups. To this end, the opportunity for improvement lies in ensuring that the right opportunities feed through to marginalised groups. To do this, the effort of the supply side players is crucial. Stakeholders such as brands, private sector companies, and impact investors can be encouraged to actively seek out and invest in businesses and projects that are led by or significantly benefit women and marginalised groups. This provides them with essential capital and resources to grow and thrive.

However, within these challenges lie significant opportunities for growth, innovation, and empowerment. The creative economy policy emphasises the need to ensure equitable employment across all diversities such as gender, age, ethnicity and persons with special needs is a stated mandate in the creative economy policy. This falls under the mandate of Statutory bodies, SAGAs, constitutional commissions, and independent offices.[47] In ensuring equitable employment across all diversities, organisations must be sensitised and incentivized to consider marginalised groups. This may be through tax incentives i.e. offering tax incentives for companies actively supporting and promoting diversity and inclusion in their operations can act as a powerful motivator, or through public Recognition and Awards where brands and organisations that champion diversity and inclusion can be celebrated through public awards and recognition can enhance their reputation and brand image.

Nuanced policies looking at promoting gender equality and inclusion in the creative economy will accelerate this. Then will look at intersections and address the payment disparities in gender

[47] Creative Economy Policy, 2024. Available here

Figure 8: Voice of the creatives - How the sector can be made more inclusive for marginalised groups[48]

Summarised below are the key gaps identified in gender mainstreaming and inclusive practices for creatives in Kenya. These constraints are used to develop recommendations in the subsequent recommendations section.

Table 9: Key challenges in gender mainstreaming and inclusive practice

Key Challenge	Description
Access to tailored opportunities and spaces	**Marginalised groups often require specific accommodations and inclusive environments to fully participate in the creative ecosystem.** The competitive nature of the creative industry, coupled with potential biases and a lack of awareness, can create barriers for these individuals. It is crucial to address these challenges by actively ensuring that marginalised groups have access to information about opportunities, receive necessary support and training, and are represented in decision-making processes. This includes implementing targeted initiatives, such as allocating a percentage

[48] CFYE Creatives survey, 2024.

	of opportunities specifically for people with disabilities and fostering a more inclusive industry culture that values diversity and recognizes the unique needs of all creatives.
Limited awareness on the unique needs and potential of marginalised groups	**Industry awareness of inclusive practices for marginalised groups is crucial for fostering a diverse and equitable creative sector in Kenya.** Marginalised groups, such as women, people with disabilities, and those from rural communities, are often overlooked or excluded due to a lack of awareness and understanding of their unique needs and potential. By promoting inclusivity and actively considering these groups for opportunities, the industry can tap into a wider pool of talent, drive innovation, and ensure that the creative landscape reflects the diversity of Kenyan society. **This not only benefits marginalised creatives but also enriches the overall quality and impact of the creative output**.

Analysis of job decency

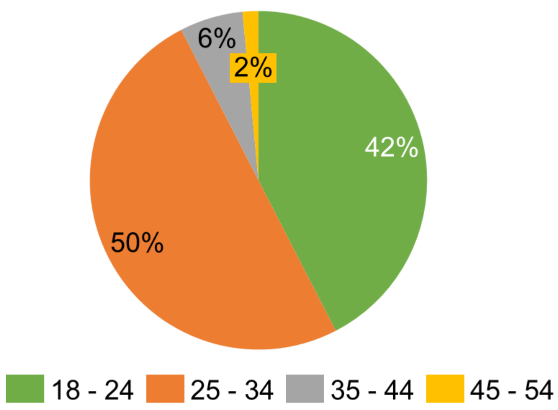
Decent work is not just a goal – it is a driver of sustainable development. More people in decent jobs means stronger and more inclusive economic growth. Improved growth means more resources to create decent jobs.[49] Promoting jobs and enterprise, guaranteeing rights at work, extending social protection and promoting social dialogue are the four pillars of the ILO Decent Work Agenda,

Job decency among youth in Kenya's creative economy is a multifaceted issue influenced by various factors. Firstly, the relatively informal nature of the economy in general impacts the level of job decency, as more formal work implies more structured employment agreements that are in line with regulatory protections.

[49] Decent Work and the 2030 Agenda for sustainable development, ILO. Available here

Stakeholder interviews suggest that some of the other key drivers of job decency include access to markets, skill and experience level, access to mentorship support, and a supportive policy environment.

Figure 9: Age split of survey respondents[50]

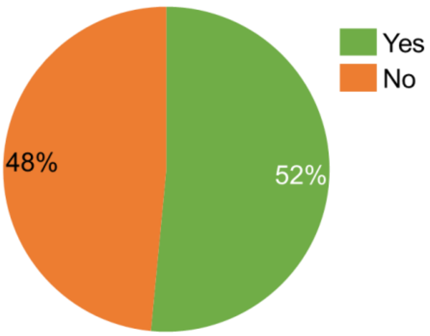


Most creatives surveyed were between the ages of 18 and 34. **Across all age groups however, access to collaborative spaces was identified as a key challenge**. This is especially the case amongst creatives living outside the Nairobi hub. Amongst older creatives in particular, lack of access to finance for projects was cited as a key need. However, amongst younger survey respondents, knowledge and awareness of opportunities is by far the most common challenge faced. **This suggests that as creatives grow in their practice, their needs change from access to opportunities, to access to the resources required to implement opportunities. This implies that older creatives have the experience and networks to navigate contractual arrangements to secure more decent jobs.**

Access to mentorship thus emerges as a pivotal factor in fostering job decency within Kenya's creative ecosystem. Mentorship, as highlighted by stakeholders, plays a crucial role in enhancing job prospects and overall well-being for creatives in this sector. This emphasis on mentorship underscores its significance in nurturing a supportive environment where creative individuals can thrive and secure decent work opportunities, ultimately contributing to the overall development and sustainability of Kenya's creative industry.

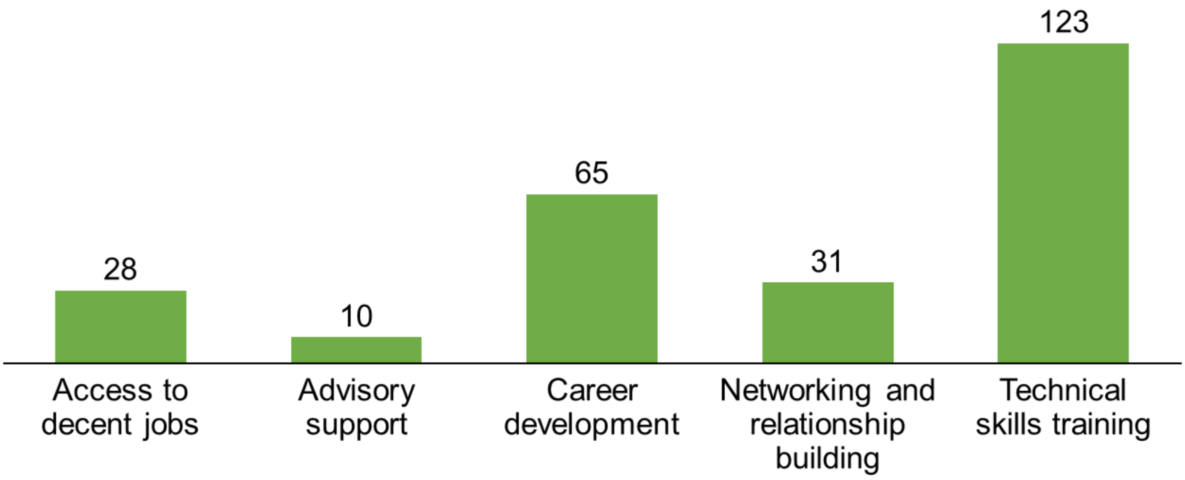
[50] CFYE Creatives survey, 2024.

Figure 10: Share of respondents that have had a mentor[51]



Of the surveyed respondents, just above half of them have had a mentor in their careers. This has resulted in a variety of impact for the respective creatives. Most frequently, creatives who have had mentors cite improvements in their confidence levels, and in some cases, cite access to opportunities that they have gained. **When asked specifically about the type of support required from a mentor, 48% of responses were for 'technical skills training', closely followed by 'career development support' at 25%, and 'networking and relationship support' at 12%.** It is important to note that the requirements for networking and relationship support was more commonly found amongst younger creatives (ages 18 - 34), while advisory support was the most frequently cited need from mentors amongst older creatives.

Figure 11: Required support from a mentor[52]



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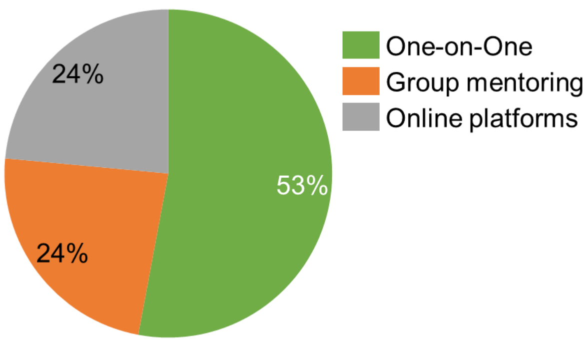
[51] CFYE Creatives survey, 2024.

[52] CFYE Creatives survey, 2024.

Survey respondents that have had a mentor generally respond positively when asked about the impact of their mentorship. The impact that mentors have on their mentees is particularly important to improve job decency. This is further evidenced by survey responses on the impact of a mentor on the respondents professional growth. Of the 52% of survey respondents who had a mentor, all responded with a positive impact. Specifically, respondents indicated that their mentors had a positive impact on their technical skills such as in writing, graphic design, music production, and film production, but also had positive effects on their self confidence, professionalism, and networking skills. A few respondents indicated that their mentors have been able to connect them with new business opportunities as well.

In terms of how creatives want to be mentored, we explore their perspectives on preferred mentorship styles and why the respondents have selected those particular styles.

Figure 12: Preferred mentorship style amongst creatives[53]



Most survey respondents suggest that one on one mentorship is the most effective method in a mentorship. This is driven by a number of factors, including customised mentorship programs for the creative's specific needs, as well as the need for a protected, safe space for learning. However, **indicated reasons for other preferred mentorship styles include the ability to facilitate peer to peer learning in group mentoring programs, and the accessibility gains by utilising online mentoring platforms**.

[53] CFYE Creatives survey, 2024.

Mentorship appears to be a particularly useful tool to drive skills development and growth amongst creatives. Survey respondents suggest that creatives seek these relationships not only to develop their technical skills, but also to develop some of the softer skills and confidence that lead to improved job decency. This is further exemplified through the desired skills and qualities that survey respondents have when considering a mentor.

Figure 13: Voice of the creatives - What qualities do respondents look for in a mentor[54]

"Consistent"

"Strong teaching skills"

"Strong expertise and experience"

"Successful in their field"

"Knowledgeable about their craft"

"Has integrity"

"Highly technical"

The size of the text above reflects the frequency of responses.

Summarised below are the key gaps identified preventing decent jobs for creatives in Kenya. These constraints are used to develop recommendations in the subsequent recommendations section.

Table 10: Key challenges in job decency

Key constraint	Description
Linkages between creatives with	**Almost half of all survey respondents haven't had a mentor suggesting a gap in the number of mentor-mentee relationships**. Mentorships are a proven way of facilitating skills development and confidence building, both critical skills required

[54] CFYE Creatives survey, 2024.

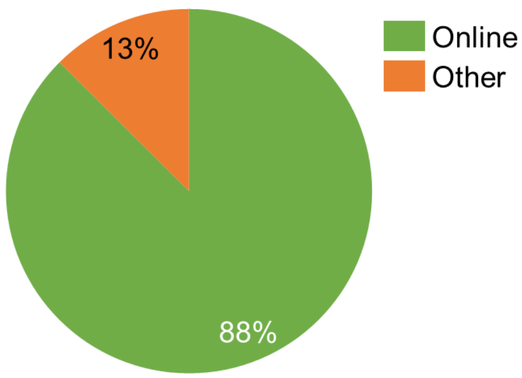
mentors	by creatives to get more decent jobs. **In the spirit of the National government's prior learning policy framework, more effort should be placed in identifying experienced creatives, recognising them for their skills and development regardless of the source of those skills, and developing incentives for them to be mentors to local youth across the country**.
Lack of incentives for mentors	**The sustainability of mentorship programs, and the pipeline through which creatives can become mentors as they become more experienced, is particularly vital for the development of the creative ecosystem**. Recognition and incentives can be used to honour creatives that have shown growth, but also as a way to bring them into the fold to support younger creatives at all levels, including regional, county and national level.
Ensuring development programs are demand-driven	**Survey results highlight the fact that the needs of creatives differ at various stages of their career**. Needs of creatives often differ by age, location, and experience levels. Younger creatives appear to need more support in accessing opportunities, while as they age, the challenges tend to revolve around the capacity to execute on identified products. **Providing support that meets these specific needs of the creative positions them with the skills they critically require, which is a direct contributor to job decency**.

Analysis of technology advancements and AI

Like many other sectors, advancements in technology have revolutionised the way creative products are developed and distributed. **Two key technologies come to mind that have bolstered the Kenyan economy - smartphones and social media by association, and more recently the rise of artificial intelligence**.

Smartphones give access to markets that were previously closed, and removes distortions in demand by giving customers direct access to products, and giving sellers direct access to consumers. These new technologies are particularly vital for Kenya. In 2022, smartphone ownership in Kenya was 56% in urban areas and 37% in rural areas.[55] However, smartphone adoption is expected to rise to 81% by 2030 as smartphones become more affordable.[56] This comes on the back of the Kenyan government's partnership with the private sector to establish two assembly plants in the country, producing affordable smartphones that will be sold for less than 50 USD.[57] E-commerce for example, offers great opportunities for Kenya, with the possibility of trading platforms designed for the Kenyan, or East African user. Increased availability of broadband internet has enabled the digitization of the retail sector and enhanced online retailers. Beyond retail, smartphones and social media platforms have given creatives access to wider markets, where they can build a reputation and skill set that can be monetized. **Smartphones serve multiple purposes for the creative, and supports creative production across the entire value chain i.e. creation, production, dissemination and exhibition.**

Figure 14: Where creatives look for information[58]



The vast majority of creatives search for information online, presumably through their smartphones, with specific sources being social media platforms (Twitter, TikTok, and WhatsApp were specifically highlighted) and search engines (Google). **This alludes to the importance of entrenching smartphone penetration and broadband amongst creatives as more than a tool to capture or develop creative products, but also as a tool to disseminate information and provide access to**

[55] The State of Mobile Internet Connectivity Report, GSMA 2023. Available here

[56] The Mobile Economy Sub-Saharan Africa, GSMA 2023. Available here

[57] Kenya Innovation Outlook (KIO), KeNIA 2024. Available here

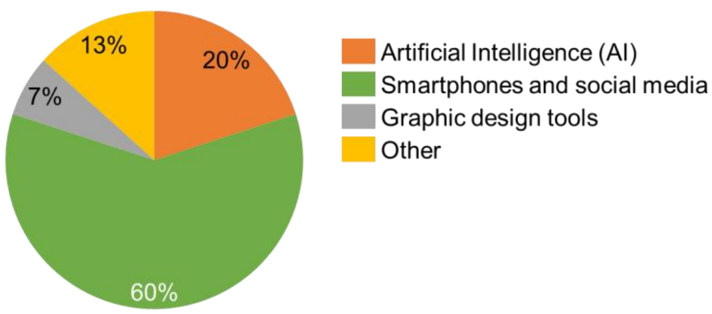
[58] CFYE Creatives survey, 2024.

relevant training programs and information. Other sources of information noted included friends and family, or in some cases, the respondent was not aware or had not searched for any sources of relevant information.

Due to issues of access or affordability, the large proportion of the labour force has also undertaken learning through informal means. To ensure increased absorption of these individuals in the workforce, the Government of Kenya has adopted a prior learning policy framework, which seeks to recognize informal education and learning as a measure of competence. Incorporating the expertise of informally trained digital experts in education design is vital for ensuring education material is kept up to date, and thus, the skills of the populace are kept in line with the demands of the industry. In addition, social media platforms can be leveraged as tools to disseminate information to creatives.

To keep up with the rapidly changing ICT technologies, some countries have put in place programs to undertake annual ICT skills surveys to inform ICT skills development plans. For example, South Africa has University Advisory Boards that checks the current ICT industry trends and align them with the training in universities on a frequent basis. This serves to strengthen the linkages between the industry and what is being taught in schools, ensuring that the skills development process in formal education institutions is suited for the respective needs of industry players.

Figure 15: Perceptions of the most important technology in Kenya's creative ecosystem[59]



In recent years, Artificial Intelligence has come to the forefront of digital innovation. Although AI is not a new concept, the current widespread awareness of AI can be traced to the release of products and services

[59] CFYE Creatives survey, 2024.

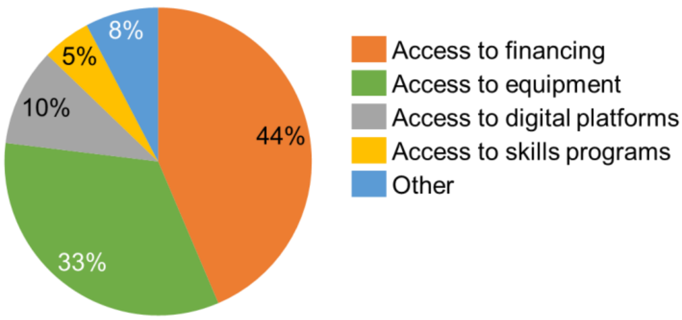
that use generative AI. Large Language Models (LLMs) such as ChatGPT are computer programs designed to process and understand natural language text. LLMs are trained on massive amounts of data, allowing them to identify patterns in language that were previously difficult for computers to comprehend. This has led to breakthroughs in natural language processing, generated outputs, and improved communication between humans and machines. Creatives are using AI for idea generation and inspiration, visual exploration, to generate melodies for music composition and to develop scripts, dialogue and characters. It is also being used to enhance photo quality, generate stunning visual effects, speed up the creative process and save time, streamline project management, automate certain activities and repetitive tasks, predict trends and create very realistic renders of designs.

In Kenya's creative ecosystem, AI is being used in various creative sub sectors already for a variety of functions. In film production, producers and writers, such as Eugene Mbugua of D&R Studios, are exploring AI in both pre and post-film production phases, enhancing their creative workflows and reducing their overhead costs. Writers like Thayũ, CEO of Creatives Garage, and Cajetan Boy are incorporating AI into their writing and research processes. Cajetan Boy also conducts workshops to help other writers integrate AI into their work for film and other formats. In graphic design and visual arts, players such as Feysal Anthony Nair, use AI to improve their workflows and creative outputs, and particularly to speed up the creative process. Corporations in Kenya are also slowly incorporating AI into their operations. Major corporations such as Safaricom and Brookside have utilised AI to create billboards with AI-generated graphics, showcasing AI's potential in marketing and advertising. **In this way, AI is already enhancing the quality and diversity of creative content not only by supporting the ideation and creation phase of the value chain, but also providing tools that can help manage the dissemination of creative practice such as drafting legal agreements or assessing the same, and developing material to pitch to potential clients**.

However, the mass harvesting of data to train AI systems also presents a significant challenge to the principles of copyright, fair use, and fair compensation. However, there are no regulations in place that dictate what AI can or cannot be trained on in Kenya, and few at the global stage. As members of the general public have taken to using AI tools to create new music, films, images, or write ups, it has elicited mixed reactions from musicians, record labels, and film studios, and blurs the copyright and intellectual property lines.

The correlation between investment in the creative sector and innovation and technology adoption is strongly positive. Increased investment can lead to uptake of more digital tools and technology for creatives. This includes both physical tools, but also software tools such as video and/or film editing software. Amongst survey respondents, access to finance was the biggest challenge impeding uptake of technology tools. Nearly all survey respondents indicated that access to finance was the key challenge they faced when seeking to access technology. There is some variation in what the finance is required for.

Figure 16: Challenges accessing technology tools[60]



Largely, the key challenge surveyed creatives face is in access equipment, or the financing to acquire new, or upgrade existing, equipment. Investment in the provision of physical equipment such as cameras, lights, laptops and smartphones, as well as investment in providing access to needed software such as graphic design tools like adobe creative studios, will grow the adoption of these new technologies and their impact in the creative ecosystem. The awareness of some of these tools, as well as the skills required to properly utilise technology tools such as AI and graphic design software, are also noted to be important gaps.

A number of strategies can be implemented to optimise AI and machine learning integration into the creative industry, with one of the most sustainable methods being the deepening of the skillset of creatives themselves and their awareness of the applications of Artificial Intelligence in their practice. AI can serve as a powerful tool that allows artists to experiment with new techniques, and also makes becoming

[60] CFYE Creatives survey, 2024.

an artist more accessible. Tools like DALL-E 2, Stable Diffusion, and Canva enable non-creatives to visualise and share their ideas easily, thus democratising the creative ecosystem. AI-powered software and platforms allow artists from remote areas or those without access to expensive equipment or formal training to bring their visions to life. Survey respondents highlight key training they need to better utilise emerging technologies, indeed confirming findings about the appetite for not just AI trainings, but also niche sub-sector specific skills.

Figure 17: Voice of the creatives - Required training to use technology[61]

"Basic computer skills"

"Sub-sector specific skills e.g. film editing software, and graphic design software"

"Coding, website creation and app building skills"

"Project management, business, and entrepreneurship skills"

"Training in how and when to use AI"

Summarised below are the key gaps identified preventing uptake of emerging technology tools and artificial intelligence for creatives in Kenya. These constraints are used to develop recommendations in the subsequent recommendations section.

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[61] CFYE Creatives survey, 2024.

Table 11: Key challenges in the use of technology advancements and AI

Key constraint	Description
Access to and affordability of emerging technologies	**Smartphone adoption lags behind basic feature phone ownership, with lower rates particularly in rural areas. Costs also remain high compared to other countries in the region, making it inaccessible to many Kenyans.** Smartphone adoption specifically limits creatives in the content creation, music, photography, videography, digital art and film sub sectors where smartphones are essential tools for production and distribution. In addition to smartphones, other digital equipment needed by creatives are costly. **This impacts creatives because the needed equipment is out of reach for a number of Kenyans and the cost of equipment slows down creatives' commercialization. This also impacts organisations offering training programs as it was noted that equipment used to train creatives may not be up to market standards**. Equipment needs to be at par with global and recent standards.
Limited awareness on the capabilities and uses of artificial intelligence	Research findings suggest a limited awareness of AI and its capabilities, hindering its broader adoption and potential benefits for the creative sector. Although applications of AI for the general public have only recently become more available, challenges with awareness stem from insufficient information and training on AI applications within the creative industry. **Consequently, many young creatives are missing out on opportunities to leverage AI for enhancing their artistic expression, streamlining workflows, and accessing new markets.** To address this challenge, targeted awareness campaigns and training programs are necessary to educate young creatives about AI's potential, demystify its complexities, and showcase its practical applications in the creative field. By fostering AI literacy and skills, Kenyan youth can harness the power of this transformative technology to drive innovation, economic growth, and social progress within the creative economy.

Conclusions and recommendations

Outlined below are the strategies that can be implemented to enable Kenyan creatives to overcome the various barriers, gaps and challenges identified through the course of this research. Implementing these recommendations seek to reduce the financial barriers, increase the level of funding and skills within the ecosystem, and facilitate investment to grow the creative sector.

Table 12: Recommendations based on identified key constraints

Learning agenda topic	Key constraint addressed	Recommendation	Description	Responsibility
Systemic barriers (Infrastructure)	Bridging the divide between rural and urban development	**Develop platforms that allow creatives to showcase their talent at the county level and facilitate access to brand opportunities to drive commercialization**	Work with county regulators, private sector players, museums, and existing creative centres to develop a network of well-equipped hubs in rural areas, offering a variety of free support services such as co-working spaces, internet access, digital tools, and training facilities and platforms for creatives to show their talent, and get paid for it. These may be in the form of exhibition spaces, performance theatres, or other facilities. These hubs and spaces can then be used to bridge the divide between rural and urban development in terms of access to opportunities, which surveyed respondents indicate as one of their most pressing needs. The objective here is to create the support systems and tools that enable creatives to grow their talents and access new opportunities and networks, thereby reaching commercialization (by showcasing their talents).	Collaborative approach between county governments, county level creative associations, private sector sponsors, Ministry of culture, arts and heritage, and donor players

		Partner with existing video-on-demand platforms to onboard as many content creators from each county	Facilitate partnerships with established video-on-demand platforms in Kenya to onboard as many content creators per county over the next year. This approach leverages existing infrastructure and market access provided by these platforms. By collaborating with these platforms, the initiative can offer a pathway to commercialization, as well as offer a structured onboarding program that identifies creatives and can be expanded to include training, mentorship, financial support, and marketing assistance to empower creatives and foster their growth.	Hustle SASA, TWIVA, Wowzi, Safaricom Baze
	High costs associated with production	**Develop programs that lower the cost of connectivity in rural locations**	Affordability of data costs impacts access and use of online platforms. Develop programs in collaboration with telecom providers such as Safaricom for reduced data costs in rural regions. Where possible, partner with local and international technology and internet service providers to enhance mobile connectivity such as Safaricom and Starlink. This will facilitate greater access to mobile-based creative tools, e-commerce platforms, and online learning opportunities for rural creatives.	Collaborative approach between telecom providers, and donor players
		Facilitate the development and marketing of financing solutions for digital equipment and smartphones	Access to high quality equipment is highlighted as a barrier to producing high quality creative output. Collaborate with telecom providers, equipment suppliers, rental houses and financial institutions to develop financing market solutions where creatives can access high quality smartphones and other required creative equipment to develop their skills and products. This can be further enhanced through the use of niche financing instruments - such as equipment leasing solutions, financing intellectual property, finance guarantee programs, secondary market products, or zero rated interest rate financing products. Alternatively, consider working with existing solutions including Lipa mdogo mdogo by Safaricom, and others such as Lipa later, Easy buy, and Watu Simu amongst others to scale their offerings to creatives or providing small loans to get membership into SACCOs. These funds can be used to enable instalment payments. Once in a SACCO, the creative can learn how to save and borrow	Collaborative approach between telecom providers, equipment rental houses, financiers or investors, and donor players

			responsibly to sustainably run their business.	
	Access to markets and spaces for commercializatio n	**Encourage creative venues to explore new revenue generating models in collaboration with creatives**	Encourage venues to explore alternative models that can drive participation and commercialization for creatives. This may include revenue share models with Performers, financing for the promotional cost of the shows, discounted or free access for use of the venue for practice before the actual show, or coordination of market outreach by leveraging and sharing mailing groups to help boost viewership. It is also possible to encourage creatives to come together for a festival that provides a Season pass ticket to watch a series of creative content over a period of time in the respective county. A season ticket can run for the period of the presentation, over a weekend or throughout the month.	Venues and collaboration spaces, creative associations, donors
		Advocate for more local content in broadcasting as a driver of commercialisation	Advocate for the enablement of local content principles in broadcasting regulations. Push for the Government to enable the stated desire of 70% of all broadcasting content to be derived from local content creators. Through this, the market for local content is increased, and there are more pathways to commercialisation for creatives.	Kenya Communications Authority
Systemic barriers (Policy	Lack of county and sub sector specific creative	**Support the coordination of public sector**	Currently, the regulatory environment is fragmented across differing ministries. This creates difficulties in coordination, and in achieving synergies at a systemic level. Support in the development of clear guidelines that will standardise coordination between the National and County Governments in their efforts to develop the creative economy. This will ensure proper	Collaborative approach between the National government ministries, County

environment)	policies	**initiatives, and push for the update of key sub-sector specific policies**	delineation of duties and responsibilities. In addition, support the development of sub-sector specific policies and initiatives, given the unique and nuanced needs of each sub-sector within the creative industry.	governments, and donor players
	Lack of meaningful public participation in policy making	**Advocate for the identification of a rotating roster of key creative minds to leverage their expertise in policy decision-making**	Drive participation in existing dialogue systems between regulators and a variety of new and experienced creatives at the county and national level. This dialogue system may be in the form of recurring bi-annual workshops. This aims to ensure that policies are closely informed by the specific needs and challenges of the creative sector, promoting a balanced approach that supports both government revenue and industry growth.	Collaborative approach between the National government ministries, County governments, and donor players
	Tax-centred innovation policy	**Encourage the review of tax structures for the creative economy**	Encourage the implementation of a tax moratorium or holiday by temporarily suspending or significantly reducing taxes for creative enterprises for a defined period, allowing them to reinvest profits into their businesses, expand operations, and create jobs.	Collaborative approach between the National government ministries and donor players
			Encouraging the offering of tax credits or deductions for investors and businesses that provide financial support, infrastructure, or training to creative enterprises, encouraging greater private sector participation and fostering a supportive creative ecosystem.	
			Evaluate the effects of tax regulations on the creative sector, including job creation, revenue generation, and innovation, to identify areas for improvement and ensure that policies are	

			aligned with the sector's development goals.	
Systemic barriers (Skills development)	Fragmented skills development efforts Misalignment between industry needs and skills programs	**Develop a repository for creatives that centralises support for creatives in Kenya**	Develop a centralised digital platform that maintains a database of active skills development opportunities. This may range from technical skills development programs to business management skills programs, but may also include market opportunities in an effort to democratise access to opportunities for all creatives, thereby circumventing any gatekeeping practices. This supports coordination and oversight of the content of business management and financial skills development programs. Vital to this process are two key steps. Firstly, ensure the incentive structures encourage the use of the platform by training programs. This can be done by getting regulatory buy-in, partnering with private sector players and coordinating with industry associations. Secondly, coordinating an extensive awareness campaign in the market with all participants to drive knowledge of the platform across all counties. This then allows for the development of a feedback mechanism that aligns learning to real life realities, using institutions like SACCOs, Banks or Enterprise Support Organizations. This will allow these organisations to give feedback that will help adjust curriculum to meet market needs.	Collaborative approach between enterprise support organisations, Innovation hubs, higher education institutions, creative sub-sector associations (e.g. ASSEK), financiers, and donor players
	Business management skills gaps	**Entrench soft skill and commercialization trainings in development programs**	Encourage the design, development, and implementation of skilling programs focused on business management training soft skills for creatives. This may be done through partnerships with existing organisations offering these programs, or through developing new curriculums that address identified gaps. For example, developing sub-sector specific training programs on how to monetize in your creative practice can help creatives identify pathways to commercialization. Broadly, training programs should be focused on training topics such as negotiation, contract management, financial management, and other business management skills as these are some of the key identified needs.	Collaborative approach between private sector players, higher education institutions, enterprise support organisations, and creative focused associations

Systemic barriers (Access to finance)	Lack of understanding of creative businesses amongst financiers and investors	**Develop skills development programs for financiers on how to leverage IP and alternative data sources for credit scoring**	Facilitate the provision of comprehensive training on the unique characteristics of the creative sector, including its sub-sectors (film, music, design, fashion, etc.) and their specific business models. The aim of this is to educate financiers and loan officers on the revenue streams, financing structures, and risk profiles of creative businesses, as well as highlight the importance of intellectual property (IP) in the creative sector and its potential as a source of collateral, amongst other alternative sources of collateral. Alternative data sources may include social media engagement, digital footprint, and online sales.	Collaborative approach between donor players, financiers, and industry associations
Gender mainstreaming and inclusive practice	Access to tailored opportunities	**Encourage the development, identification and marketing of tailored opportunities for marginalised groups**	Work with existing brands to platform individuals from marginalised groups. Actively encourage the development, identification, and marketing of tailored opportunities for marginalised groups. This involves engaging with brands and facilitating partnerships with creatives who fall within these groups and provide opportunities for marginalised groups to reach commercialization. This may also involve developing specialised programs, workshops, and initiatives that cater to the unique needs and challenges faced by women, people with disabilities, and individuals from other marginalised communities. Promoting awareness and visibility of these opportunities through targeted outreach and marketing campaigns can ensure that they reach the intended beneficiaries, and also encourage mindset change, enabling further integration and participation in the creative economy.	Collaborative approach between public sector, private sector, and donor players
	Lack of industry awareness	**Develop awards and platforms to recognise brands and organisations for their commitment to**	Develop awards and platforms that recognize brands and organisations actively demonstrating a commitment to inclusive practices. These awards can highlight and celebrate companies that prioritise equal opportunities, accessibility, and representation for marginalised groups in their workforce, projects, and initiatives. Additionally, establishing platforms for showcasing and sharing inclusive practices can encourage knowledge exchange and inspire other organisations to adopt similar approaches. By publicly acknowledging and rewarding inclusive efforts, the creative sector can foster a culture of diversity, equity, and	Collaborative approach between donor players and public sector actors

		inclusive practice	inclusion, ultimately leading to a more vibrant and representative industry.	
Job decency	Lack of sufficient mentorship programmes	**Identify and collate a network of creative experts within each county, and connect them with creatives for mentorship**	Increase the availability and accessibility of mentorship programs specifically tailored for creatives. Establish a structured system that identifies and pairs emerging creatives with experienced mentors in their respective fields. The use of inter-county collaboration and competitions, focused on growing creatives in various counties, will be vital in identifying key mentors and mentees. This should be supported by clear guidelines and expectations for both mentors and mentees to ensure effective and impactful mentorship experiences.	Collaborative approach between private sector actors, industry associations, and educational institutions
	Development programs are not specified to the needs of various creative groups	**Advocate for nuanced training programs that take into account needs of creatives at various ages, experience levels, and sub-sectors**	Conduct a thorough needs assessment to identify the specific challenges and skill gaps faced by different creative groups, considering factors such as age, location, experience level, and sub-sector specialisation. Based on these assessments, training programs and workshops should be customised to address these unique needs, offering flexible learning formats, including online and offline options, to accommodate various learning styles and accessibility requirements. By adopting a more tailored and inclusive approach to skills development, a wider range of creatives can be empowered to reach their full potential and actively contribute to the growth of Kenya's creative economy.	Donor players
		Develop a baseline of features of decent work in the creative sector that gives creatives	To develop a baseline for decent work in Kenya's creative sector, a comprehensive approach is necessary. Firstly, a standardised definition of "creative work" must be established, encompassing various sub-sectors. Secondly, a survey of existing payment structures within these sub-sectors should be conducted to understand current practices. Based on this data, minimum payment levels can be proposed, considering factors like experience, project	Collaborative approach between donor players, industry participants, industry associations and

		leverage in job decency and commercialization	complexity, and market rates. Additionally, the baseline should include provisions for contracts, intellectual property rights, and social protection, ensuring fair treatment and sustainable livelihoods for Kenyan creatives.	professionals
	Lack of incentives for creative mentors	**Facilitate the development of mentorship programs with appropriate incentives to keep mentors returning**	Support the development of mentorship programs with enticing incentives that encourage experienced creatives to participate actively as mentors. These incentives could include financial compensation for their time and expertise, public recognition and awards for their contributions, and opportunities to network with industry professionals and showcase their skills. Additionally, establishing a system for tracking and evaluating the impact of mentorship programs can demonstrate their effectiveness and ensure their continued support and refinement, further motivating mentors to remain engaged and committed to nurturing the next generation of creative talent. An example of this is the Safaricom Blaze mentorship program.	Collaborative approach between donor players, higher education institutions, TVET institutions, and industry associations and professionals
Technological advancements	Access to and affordability of emerging technology platforms	**Collaborate with industry players to facilitate access to needed creative software tools**	Partner with technology companies and financiers to offer discounted access to software and hardware tools for creatives. This can include negotiating bulk licensing agreements for creative software, providing access to cloud-based computing resources such as design platforms, or offering affordable hardware rentals or lease-to-own programs. This should be informed by the specific needs of intended recipients of the program.	Collaborative approach between donor players, technology platform providers, higher education institutions, and enterprise support organisations
		Develop streaming platforms to	Development of streaming technologies for plays and theatre productions outside Nairobi. Providing rural productions access to markets and audiences that can pay to experience their	Collaborative approach between

		showcase creative productions	talent, is a driver of commercialization. A service that captures county plays and offers them through traditional media for a cost would help in monetization.	creatives, venues and platforms, video on demand services, and technology providers
	Limited awareness on the capabilities and uses of artificial intelligence	**Develop awareness campaigns on the benefits and uses of AI**	Develop targeted awareness campaigns that showcase the benefits and practical applications of AI for creatives. These campaigns should demystify AI, highlighting its potential to enhance creative expression, streamline workflows, and open up new market opportunities. By partnering with industry stakeholders, educational institutions, and technology companies, these campaigns can provide creatives with the knowledge and resources needed to effectively integrate AI into their practice. Furthermore, showcasing successful use cases of AI in the creative sector can inspire and encourage wider adoption, ultimately fostering a culture of innovation and technological advancement within Kenya's creative ecosystem.	Collaborative approach between public sector, private sector, and donor players