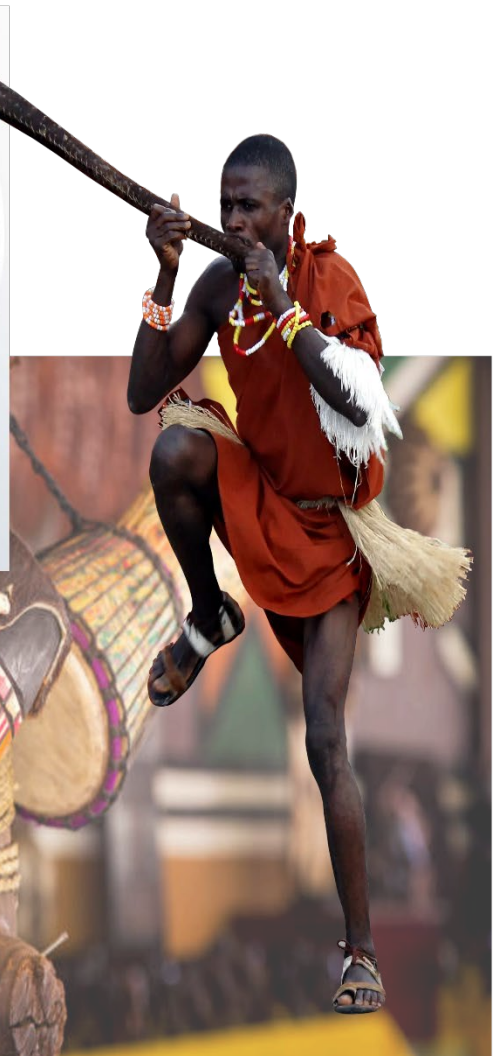




National Planning Authority
Planning for Development



A Diagnostic Study of the Cultural and Creative Industries in Uganda



May 2025

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LIST OF ACRONYMS

APNET	African Publishers Network
BASPA	Bakayimbira school of Performing Arts
CD	Compact Disc
CFU	Colonial Film Unit
DSPs	Digital service Providers
DVD	Digital Versatile Disc
EAC	East African Community
GKMA	Greater Kampala Metropolitan Area
IGP	Inspector General of Police
KITF	Kampala International Theatre Festival
MIFF	Manya International Film Festival
MoFPED	Ministry of Finance, Planning and Economic Development
MoE	Ministry of Education and Sports
MoGLSD	Ministry of Gender, Labour and Social Development
MoICT&NG	Ministry of Information, Communications Technology and National Guidance
MoJCA	Ministry of Justice and Constitutional Affairs
MoTIV	Makers of Innovation Village
MoTWA	Ministry of Tourism, Wildlife, and Antiquities
NCF	National Culture Forum
NDIFF	Nile's Diaspora International Film Festival
NDPIV	Fourth National Development Plan
NGO	Non-Government Organisations
PIFF	Pearl International Film Festival
QKIFF	Queer Kampala International Film Festival
SHC	Second-Hand Clothes
TEXDA	The Textile Development Agency
UBC	Uganda Broadcasting Corporation
UCC	Uganda Communications Commission
UFF	Uganda Film Festival
UFMI	Uganda Federation of Movie Industry
ULRC	Uganda Law Reform Commission
UNCC	Uganda National Cultural Centre
UNDP	Uganda National Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UPRS	Uganda Performing Rights Society
URA	Uganda Revenue Authority
URRO	Uganda Reproductive Rights Organisation
UTV	Uganda Television
UWEP	Uganda Women Entrepreneurship Programme
VAT	Value Added Tax
VOD	Video On Demand
YLP	Youth Livelihood Programme

Executive Summary

Creative industries have their origin in individual creativity, skill and talent and have a potential for wealth and job creation through the generation and exploitation of intellectual property (*The EAC Creative Industries Act, 2015*). For the purpose of this study, nine (9) creative domains were considered, including; visual arts, artistic crafts, fashion design, performing arts, film, music, media art (i.e., TV/Radio), culinary art, and creative writing & publishing. However, the study took note of the existence of other creative sectors as defined by UNESCO including; cultural & natural heritage, and design & creative services (i.e., graphic design, interior design, landscape design, architectural services, advertising services)

The creative industries have potential to generate revenue, create employment opportunities for the growing youth population, promote and protect cultural identity, and foster innovation. According to UNESCO (2022), the creative industry accounted for 3.1% of the Global GDP and 3.2% of all employment in 2022. The contribution of the creative industries to Uganda's economy has not been properly quantified. It was estimated at only 3.5% of GDP and 4.5% of direct employment in 2017. Compared with other sectors, the creative industries are generally inclusive and forward-looking, favouring youth and women, and offering eco-friendly solutions to development challenges. They also boost related sectors, including tourism and manufacturing. Availability of creative content drives manufacturing and sales of electronic devices (such as TV sets, tablets, and smartphones). For this reason, the fourth National Development Plan (NDPIV) identifies the creative industries as a key driver of wealth and job creation.

This study aims to understand the impact of the creative industries on job creation and revenue generation and to integrate the opportunities and challenges related to creative industries into national development planning, strategies and budgets. A value chain analysis of the selected creative industry domains was undertaken for a deeper understanding of key actors and their roles, and gaps at each stage. Both qualitative and quantitative approaches were employed through collection of secondary and primary data. Key informant interviews and focus group discussions with both state and non-state actors were consulted to gather their insights on the subject. A field survey was also conducted across the 15 sub-regions where the creative artists, policy makers, academia and implementers were consulted.

Value chain analysis

All the creative industry domains consist of initial creative ideas, which are usually combined with other inputs to produce creative products or services, which then move through a series of interlinked stages before they reach the final consumer. The stages include: i) creation/composition, which concerns the origination and authoring of ideas; ii) Production/publishing, which concerns the making of creative products, whether one-off products (e.g. crafts, paintings, sculptures) or mass reproducible products (e.g. music, movies, TV programmes; iii) Marketing/distribution, which concerns bringing the generally mass-produced creative products to consumers and exhibitors; and iv) Consumption, which concerns the engagement with and utilization of creative goods, services and experiences. However, with digitization, the different nodes of the chain interact in real time, not as a pipeline, where value is added to a product or service at a particular stage and then passed on to the next stage.

Findings

Policy and Regulation. This relates to activities carried out by institutions (public or private) whose mission is to offer the means and a favorable environment for creative activities, operators and spaces. Whereas the policy and legal framework is elaborate, there are issues related to policy fragmentation and relevance to today's dynamic and digital environment, implementation and enforcement. Regulation of the creative industries is fragmented across several ministerial portfolios, often leading to policies that are uncoordinated at best, or contradictory at worst. However, the lack of coordination between these agencies and unified planning for growing the value of Culture and Creative Industries (CCIs) has led to inefficiencies, confusion, and high compliance costs for industry stakeholders. Additionally, there are weaknesses related to copy right, intellectual property and the existing collective rights management organizations which has resulted into persistent piracy of creative works, copyright infringements and unfair royalty distribution. This has restricted the revenues of cultural and creative professionals, practitioners and companies and slowed their growth and ability to create jobs.

Education and Training. The characteristics of talent, creativity, skill and innovation are either nurtured in school or through prolonged exposure. The government has integrated creative arts education in education and training due to the transformative role played by the industry. Education and training support programmes for the cultural and creative industry sector exist in various forms in Uganda. However, they are not well resourced to address the various challenges that characterize the sector. They do not adequately meet the demands and ambitions of the growing cultural and creative industry. There are few structured programs/strategies in schools aimed at identifying and nurturing talents from an early age, which has resulted in under-recognition of pupils/students within the school system. Career guidance and mentorship programs across all levels of education are lacking which has led to students making uninformed career choices and underutilization of their creative potential. Furthermore, the inadequate publicly funded skilling facilities for the creative artists has severely limited opportunities for Uganda's creative talents, most of whom are self-taught.

Ancillary goods and services are those that are provided by urban authorities or the private sector to facilitate or enable the creation, production, dissemination or exhibition of cultural works. They include creative infrastructure such as; theatres/cinemas, live performance venues, co-working spaces, art studios, artist residency facilities, public libraries and bookstores, creative hubs, festivals, etc. However, these ancillary goods and services are very limited in Uganda, with private sector investment mostly concentrated in Kampala and a few urban centers, sparse professional-grade theatres, cinemas, and co-working hubs. The high taxes on equipment further exacerbate the situation, discouraging investment in high-quality production infrastructure. Furthermore, the lack of sufficient ICT infrastructure has resulted in limited internet access and connectivity which has restricted creation, production and the ability of creatives to promote and distribute their work.

Financing and access to capital. The proportion of the national budget allocated to the culture and creative industries is low, which has hindered effective implementation of the policies, programs and planned activities supporting the creative industry. Over the last previous years, overall government spending on the culture and creative industries hovered at 0.1% of the national budget. In addition, in FY2023/24, the ministry Gender, Labour and Social Development allocated Shs9.069 billion, or 0.016% of its budget to the department of culture and family affairs, however, most of the money was allocated to the division of family affairs leaving the culture division with hardly no money to spend on creative activities. In addition,

the high cost of credit, stringent requirements for accessing loans from commercial banks, and a high level of informality have made it difficult for creatives to obtain financing.

Market access and visibility for Uganda’s creative goods and services. Despite Uganda’s rich cultural offerings, there is a significant gap in marketing and branding. The inadequate structured local and export strategies for marketing the creative goods and services have hindered their effective local and international consumption as well as the global visibility of Ugandan creative products. The failure by the government to enforce the policy mandating broadcasters to have 70% local programming as local content has constrained domestic market growth. Furthermore, the absence of targeted export support restricts Ugandan creatives leading to no or limited support for Ugandan artists to participate in major international creative industry events and art markets, which are crucial for facilitating collaborations and opening doors to global opportunities. Additionally, the limited connectivity & high cost of internet, and insufficient digital skills among creatives restrict their ability to leverage the opportunities presented by digital platforms.

Preservation and archiving. Every piece of art has a story – why it was created, what it represents, and what it means to the artist and the community and this has to be preserved for the future generation. Content creators, draw deeply on the cultural heritage of their society. However, given their fragile nature, most artworks deteriorate over time due to lack of proper care, hence the risk of losing the culture and history behind the art. Uganda has no clear, formalized systems for assessing the value of cultural assets whether in terms of monetary compensation, preservation, or cultural significance, which leaves these artifacts vulnerable to mismanagement, undervaluation, and even irreparable loss.

Policy Recommendations

1. Harmonize the Institutional and regulatory framework
 - a. Create a dedicated department responsible for Culture and creative arts in the Ministry of Gender, Labour, and Social Development separate from that of Family Affairs; and
 - b. Strengthen the enforcement capacity of URSB and the Uganda Police Force through specialized and continuous training to combat digital piracy
2. Streamline the leadership of the different creative domains to ensure effective coordination and management.
3. Repeal and amend outdated legislation to align with current and emerging trends in the creative industry:
 - a. Strengthen copyright protections and intellectual property laws to prevent piracy and unauthorized use of creative works. This includes establishing a robust legal framework and effective enforcement mechanisms, especially in music, film, and literature;
 - b. Initiate programmes to enhance intellectual property awareness among artists. Knowledge of how to protect and effectively use the intellectual property system will provide a dependable source of income to artists and other stakeholders;
 - c. Strengthen the URSB and Uganda Police’s enforcement capacity through specialized and continuous training to combat digital piracy; and
 - d. Strengthen the capacity of the different Collection Management Organizations (CMOs) to enforce compliance for royalty payments by including a provision in the

copyright law to present a certificate of compliance to royalty payments from the approved CMOs, as part of the considerations for license renewal for broadcasters and Telecom companies;

4. Improve funding and access to capital:

- a. Gradually increase the budget for the culture and creative industry to ensure that it aligns with the African Union's (AU) 2021 recommendation that requires member states to allocate at least 1% of their national budget to the arts, culture, and heritage sector by 2030;
- b. The MoGLSD should allocate a dedicated and substantial portion of its budget to the creative industry to support planning, research, execution of creative initiatives, monitoring and evaluation; and
- c. Establish a government-backed fund (or grant) for either sector-specific, or for the entire creative industries under the creative arts council.

5. Develop and improve infrastructure for production, distribution, promotion and preservation of creative goods and services:

- a. **In the medium-term**, redevelop the National Theatre to increase its estimated 377-seater capacity to at least a 2500-seater and repurpose it as a national multipurpose hub for all the creative domains;
- b. **In the long-term**, through Public-Private Partnership (PPP) arrangements, establish fully equipped regional multipurpose creative hubs, public libraries and museums for young artists and practitioners;
- c. Make provisions in the urban planning laws that require establishment of creative infrastructure in city and municipal councils; and
- d. Incentivize the private sector to invest in the development of creative infrastructure and acquisition of inputs and equipment required for improving and standardizing the quality of CCI products.

6. Improve market access and visibility for Uganda's creative goods and services:

- a. Facilitate the participation of exceptional Ugandan creators (visual artists, artisans, musicians, filmmakers, fashion designers, etc.) at international festivals, exhibitions, fashion weeks, and trade fairs to showcase their products;
- b. Support private sector investment into digital platforms (such as online marketplaces for visual arts and crafts, audio-visual content streaming services) to increase digital presence of Uganda's creative goods and services;
- c. Streamline the process of seeking and acquiring approvals for concerts, festivals, and film shoots to lower costs and reduce bureaucracy;
- d. Leverage the missions abroad to conduct cultural and creative diplomacy; and
- e. Adopt a deliberate Government policy to consume (exhibit) local CCI products in public offices; and
- f. Enforce the local content quotas on media platforms

7. Establish robust data, research, and monitoring systems for the Culture and Creative Industries (CCIs): -
 - a. Strengthen national statistical capacities to generate reliable and disaggregated data on the Culture and Creative Industries (CCIs);
 - b. Support sector-specific research to build evidence for policy formulation, investment, and innovation in the CCIs; and
 - c. Establish regular monitoring and evaluation frameworks to track performance, measure impact, and guide sector development.
8. Close the skills gaps:
 - a. Include in the TVET curriculum, courses related to digital media, music production, film-making, fashion design, and entrepreneurship to equip Uganda's artists with the necessary skills to compete in the global creative economy;
 - b. Enforce the requirement of organizing annual national school music, dance and drama festivals to stimulate early interest in performing arts and creating a firm foundation for further education and training among children;
 - c. Provide supportive infrastructure for visual and performing arts teacher training to address the current skills and knowledge challenges within the creative industries;
 - d. Provide sufficient infrastructure and practical tools/materials at UHTTI to enhance hands on training for application of diverse culinary techniques; and
 - e. Implement mentorship and networking programs for emerging Ugandan creators by connecting them with experienced professionals and industry leaders in their respective creative fields.

1.0 Introduction

The creative economy (also known as the orange economy) is an evolving concept driven by a diverse range of interconnected creative industries. It is based on knowledge-based economic activities; intensive use of creativity to add value to products and services; as well as the ability to generate income from trade and property rights (UNCTAD). According to UNESCO it includes both the outputs of human creativity (whether past or present) and other activities that contribute to the creation and distribution of cultural and creative products.

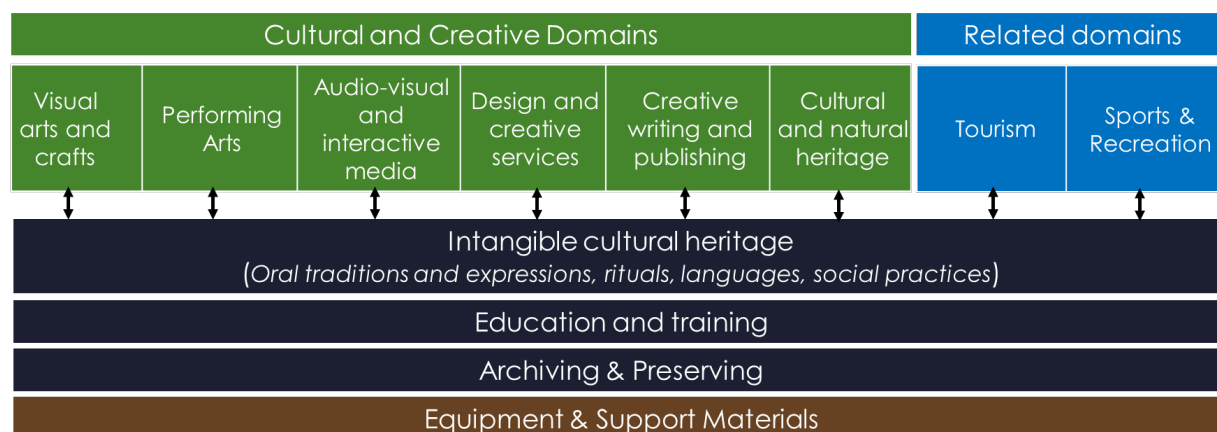


Figure 1: UNESCO Creative Economy

There is no universal definition of Culture and Creative Industries (CCIs)¹. UNESCO, the United Nations body mandated to handle culture related affairs, defines them as a sector whose primary purpose is the production, reproduction, promotion, distribution, and/or commercialization of goods, services, and activities of a cultural, artistic, or heritage-related nature. The United Nations Conference on Trade and Development (UNCTAD) defines CCIs as the cycles of creation, production and distribution of goods and services that use creativity and intellectual capital as primary inputs. The United Kingdom's definition, which was also adopted by the EAC Creative and Cultural Industries Bill, 2015, is "those industries which have their origin in individual creativity, skill and talent and have a potential for wealth and job creation through the generation and exploitation of intellectual property". While definitions vary, all of them emphasize culture and creativity as a focus of activities, including generation of creative content (products or services, intellectual property/ copyright and commercialization or wealth and job creation).

Given its broad use, this study adopted the 2009 UNESCO Framework for Cultural Statistics, which categorizes the CCIs into 6 groups including: i) Visual arts and crafts; ii) performing arts; iii) Audio-visual and interactive media; iv) Design and creative services; v) literature and publishing; and cultural and natural heritage. Each category is composed of more than one creative domains (see Table 1).

¹ The creative industries sector is also referred to as creative and cultural industries, creative and digital industries, or the creative industry within the creative economy. It is also referred to as the Orange Economy (La Economía Naranja) in Latin America and the Caribbean.

Table 1: Categorization of Cultural and Creative Industries

Visual arts and crafts	Performing Arts	Audio-visual and interactive media	Design and creative services	Creative writing and publishing	Cultural and natural heritage
• Fine arts • Photography • Crafts	• Drama, • Dance, • Traditional/folk music, • Cultural festivals, fairs, and feasts • Stand-up comedy	• Film, animation and video • Music • TV and radio (live streaming online) • Podcasting Video games	• Fashion design • Graphic design • Interior design • Landscape design • Architectural services • Advertising services	• Fiction and non-fiction literary creations (<i>novels, poems, drama/film scripts, lyrics, speeches, memoirs</i>); • Publishing of books, newspapers, journals & periodicals	• Culinary arts • Libraries & Archives • Museums • Archaeological and historical places • Botanical & zoological gardens • Natural reserves

The creative industries are major drivers of economic growth. Drawing upon the unique local cultural heritage, they have a tremendous influence on job creation, and domestic revenue generation. Cultural and creative industries worldwide generated revenues of USD4,200 billion and employed 45 million people in 202, (Afreximbank, 2022; Arts Council England, 2020; and UNCTAD, 2022). This is an increase from revenues of US\$2,250b and employment of 29.5 million people in 2013 (EY, 2015). The creative industries are generally inclusive and forward-looking, attracting a disproportionate number of women and youth, making them a strategic sector for combatting youth unemployment. They also boost related sectors, including tourism and manufacturing. Availability of creative content drives manufacturing and sales of electronic devices (such as TV sets, tablets, and smartphones).

Creative industries in Africa are poised for rapid growth in the next decades if they are capacitated to grab opportunities. African countries have rich and diverse cultural heritages, a rising middle class and youthful population, which are key drivers of demand for creative content across the world. The explosion of African music on the continent and the keen interest of international players (such as Netflix, Universal Music Group, Apple Music and others) in the African market are clear indicators of how strong the market potential is. However, the capacity of African creative industry players needs to be strengthened to directly leverage opportunities and negotiate fair terms with international players. Private sector investment remains low, with only 1.1% or USD22 million of total African start-up investment going to entertainment companies in 2019 (AFD, 2021).

While Africa continues to import a lot of creative content, demand is increasingly geared towards local content. The Nigerian film industry (Nollywood), which is the country's second largest employer, was boosted by huge demand for local content with little supportive policy or structured investment. This shows how demand can fuel industry growth. However, opportunities can be leveraged better and faster with a mix of support instruments.

1.1 An overview of the creative industries in Uganda

The UNESCO Statistical Institute provides 6 broad categories of activities for assessing the economic impact of the culture and creative industries. These include: 1) Cultural and natural

heritage; 2) Visual arts and crafts; 3) Performance and Celebrations; 4) Design 5); Audio-visual and interactive media; 6) Literature and publishing (UNESCO, 2009). Sports and recreation are not considered creative activities although they contain creative elements.

1.1.1 Cultural and natural heritage

As a creative sector, cultural and natural heritage involves the transformation of raw cultural and natural heritage elements into valuable experiences, products, or services that can be consumed by tourists, communities, or wider audiences. It encompasses a broad category of activities including; preservation, interpretation, marketing, and ultimately generating economic and social benefits. **Natural heritage** consists of natural features, geological and physiographical formations and delineated areas that constitute the habitat of threatened species of animals and plants and natural sites of value from the point of view of science, conservation or natural beauty. It includes nature parks and reserves, zoos, aquaria and botanical gardens. Cultural heritage includes tangible and intangible elements. **Tangible heritage** includes monuments, town sites, archeological sites, and works of art that carry and transmit the cultural features of a society or group. According to UNESCO, **intangible cultural heritage** is manifested in oral traditions and expressions, including language, the performing arts, social practices, rituals and festive events, knowledge, skills, instruments, objects, artefacts and practices concerning nature and the universe, and traditional craftsmanship. Intangible cultural heritage is transmitted from generation to generation however, it is constantly recreated in response to the prevailing environment and nature (UNESCO, 2009).

Uganda's tangible heritage includes the built environment (historic buildings, monuments), natural land forms (mountains, valleys, forests, caves, rocks, etc.) and other sites of cultural, natural and historic significance, whose regulation, preservation, promotion, and protection is handled by the Ministry of Tourism, Wildlife and Antiquities (MTWA) through designated institutions like the Uganda National Museum and the Uganda Wildlife Authority, with key aspects including identification, documentation, conservation, and community engagement, while facing challenges like lack of awareness, funding, and rapid development pressures that could threaten heritage sites.

A country's history, traditions and cultural heritage, whether tangible or intangible, is a source of inspiration and a strong determinant of creativity (Cerisola, 2019)². Uganda, has more than 65 ethnically-based tangible and intangible cultural heritage resources that not only embed people's identities but also philosophies and values in which histories of very many years have been invested. Uganda has five cultural elements on UNESCO's List of Intangible Cultural Heritage that need urgent safeguarding including the: Ma'di bowl lyre music and dance; Koogere oral tradition of the Basongora, Banyabindi and Batooro; male-child cleansing ceremony in Lango; Empaako tradition of the Batooro, Banyoro, Batuku, Batagwenda and Banyabindi; and Bigwala, gourd trumpet music and dance of the Busoga Kingdom (CCFU, 2018).

Barkcloth making, which has been inscribed on the representative list of the intangible cultural heritage of humanity, can be found in the diverse cultural practices, beliefs, values, history,

2 Cerisola, S. (2019) 'A new perspective on the cultural heritage–development nexus: the role of creativity'. Available at: <https://doi.org/10.1007/s10824-018-9328-2>

ceremonies, and other aspects of the culture of the various ethnic communities that constitute Uganda as a nation.

Food is considered a part of intangible cultural heritage, a way of life that is passed down from generation to generation. Traditional recipes, cooking techniques, and dining etiquette can reflect the values and beliefs of different communities and are all vital parts of cultural heritage. The preparation and presentation of traditional dishes are considered an art form - culinary arts. The UNESCO Creative Cities program (<http://fr.unesco.org/creative-cities/content/creative-cities>) includes the culinary arts domain in its conception of a creative society.

1.1.1.1 Culinary Arts

Culinary arts refer to the aesthetics of food – the art of presentation of food on a plate to visually appeal to customers. This domain concerns the artistic expression of food - preparation, cooking, presentation, and service. This aesthetic dimension of food is not only about how it's presented but also about storytelling, where each dish can convey a narrative about its origins and the chef's creative journey. The way food looks, smells, and tastes plays a significant role in the dining experience. If food is presented attractively, customers would be willing to eat it again if other aspects like taste and smell remain constant. However, scientific literature on culinary talent and its development is limited.



Photo by Doreen Kansime and Rahim Foods

Uganda boasts of a rich culinary heritage, and traditional dishes play a significant role in the country's food culture. There is a range of customary foods, preparation methods, and rituals that are exclusive to certain areas or groups of people. Each dish, ingredient, and cooking method tells a story of the area, its people, and their history. The traditional methods of preparing dishes like *luwombo* and the use of indigenous ingredients like millet and cassava showcase a deep connection to the ancestral heritage.

The intermingling of external influences with indigenous cooking traditions led to a unique fusion that is evident in Ugandan cuisine today. Historically, Uganda was a nexus of historical trade routes, which brought in a variety of spices, flavours, and cooking techniques. For instance, rice, which was not native to Uganda, became a staple due to these trade interactions. Other new crops such as tea and coffee, as well as, western cooking methods, dishes, dining etiquette and meal structures, with formal dining practices were introduced

during the colonial era. Bread, biscuits, and certain types of cakes, previously unknown, became part of the Ugandan diet, especially in urban areas. This has given Ugandan cuisine a distinctive character, marked by a diversity of flavours and a fusion of cooking techniques that reflect the country's multifaceted cultural heritage.

Today, the culinary sector in Uganda is influenced by the global trend of culinary innovation, where chefs are encouraged to experiment with new techniques and ingredients while maintaining a connection to traditional practices. The educational aspect of culinary arts is becoming popular, with an increasing number of culinary schools and training programs, which emphasize the importance of creativity and innovation in culinary practices in addition to technical skills (Lin & Baum, 2016).

Stewing is a popular cooking method in Uganda, where all ingredients are cooked together at the same time. The ingredients are placed in at different times as the sauce cooks and finally thickens. With more than 30 ethnic groups, Uganda does not have a single national dish that is universally eaten by all. However, matooke, a green banana is popular among many households, especially in the central and southern part of the country. It is either boiled or steamed, then usually mashed and cooked in or served with a sauce of peanuts, beans, fresh fish or meat (CREEC 2024).

1.1.2 Visual Arts and Crafts

The Visual Arts and Crafts include fine arts such as paintings, drawings, sculpture; crafts; and Photography. Commercial places where the objects are exhibited, such as commercial art galleries, are also included in this category.

1.1.2.1 Visual arts

The visual arts subsector involves the use of materials and techniques to create original works of art that are visually pleasing rather than functional. Visual arts include: commercial fine art (wildlife, landscapes, still life), often executed in traditional media (paintings, and drawings; original engravings, prints and lithographs); original sculptures and statuary, in any material; photographic activities; and contemporary art, which incorporates new media technology, performance, experimentation, cross-disciplinary practices and public art (ILO, 2003).

The colonial government and subsequent independence era brought significant shifts in the visual art landscape, influencing the artistic practices of Uganda. The contemporary art movement began taking shape in the 1930s with Margaret Trowell, a British artist who established the School of Industrial and Fine Arts at Makerere University and founded the Uganda Art Club, fostering a burgeoning art community. As the country navigated its post-independence era, art became a platform for asserting cultural identity, challenging societal norms, and engaging with the broader global art discourse. Artists started using their works to reflect the nation's political turmoil, particularly during Idi Amin's regime, when "camouflage art" emerged as a form of resistance against oppression. The economic challenges and political isolation of the 1970s and 1980s shifted focus to batik art, which dominated the Ugandan art market due to its affordability and apolitical themes. By the late 1980s, the visual arts evolved further, with artists increasingly producing market-oriented works that highlighted cultural identity. The 1990s saw the establishment of key institutions such as the Uganda National

Museum and Nommo Gallery, which promoted local talent and shaped Uganda's modern creative landscape.

Most visual artists in Uganda are self-employed or part-time. Their main income streams are through selling artworks, and on-call employment by private companies that pay on commission basis. For those with formal education, there are few teaching opportunities at various universities and schools. Some artists work in museums or art galleries as art directors, archivists, or curators. NGOs also provide lucrative work for these artists, as part of their advertising campaigns in illustration and the graphic arts. There are a few co-working spaces/art studios/associations/creative hubs that offer different possibilities for an artist to use a space for free or rent. These include; *MoTIV (Makers of the Innovation Village)* in Bugoloobi,



Source: Edward Ssajjabbi Kamugisha

32° East Ugandan Arts Trust, Circular Design Hub Kampala and The Weaver Bird Arts Community in Masaka City. However, most artists' studios are located within residential settings, with the space also serving as exhibition, gallery and point of sale. Uganda's visual artists face stiff competition from cheap imported art products from countries like China, including curtains, carpets, and wall hangings. These products are commonly found in public spaces, hotels, and even government offices, which could otherwise showcase Uganda's unique cultural heritage.

1.1.2.2 Crafts

The crafts sector involves creation of handmade (or with the help of hand-tools) artistic products that are designed to be decorative, functional and socially symbolic. The crafts



Source: African Village, Kampala

sector in Uganda existed since pre-colonial times. The craftsmanship and skills have traditionally been handedover from generation to generation, however, this has disappeared considerably over time. Craft can be classified under six main categories primarily based on the materials used, and, in certain cases, combining the material and the technique. These are: i) basket/wicker/vegetable fibre-works; ii) leather; iii) metal; iv) pottery; v) textiles; and vi) wood. Uganda has a wide array of handicraft products ranging from basketry, mats, ceramics, beads, pottery, hand textiles and woven products, toys, jewellery, bags, ornaments, leather products, batiks and wood craft among others. Iron curving, which was discovered by Ugandans as early as the sixteenth century, is still practiced to date. These items are produced in almost all the districts and regions of Uganda using locally available raw materials, with limited products differentiation based on culture, history and traditions. Therefore, over-production of similar crafts is common, resulting in surplus.

Complementary categories could correspond to various additional materials that are either specific to a given country, region or area, such as: stone, glass, ivory, bone, horn, shell, sea shells, etc (ILO, 2003). Handicraft production is thriving as the industry is perceived as a potential business opportunity for sustainable income generation, thus attracting more artisans, traders and exporters.

1.1.3 Performance and Cerebration

Performance and Celebration include all expressions of live cultural events such as Music and Performing Arts.

1.1.3.1 Performing arts

Performing arts are creative activities presented before a live audience on stage or in open places or pre-recorded for professional presentation. They include theatre, dance, live music, stand-up comedy, festivals, and events. **Theatre** combines speech, gestures, music, and other elements to portray stories, requiring collaboration among actors and a team managing stagecraft, lighting, sound, and makeup. There are different types of theatre including drama, poetry and stand-up comedy. **Dance** involves rhythmic body movements to music, expressing ideas or emotions, and ranges from choreographed classical forms to contemporary performances emphasizing aesthetics and creativity.



Uganda's performing arts industry boasts a rich history, evolving through pre-colonial, colonial, and post-independence periods. Pre-colonial performances were deeply rooted in traditional events, ceremonies, and festivals, integrating music, dance, storytelling, and rituals that reflected the cultural identity of various ethnic groups. The colonial period, however, suppressed indigenous art forms, labelling them indecent, while introducing western-style theatre and musical instruments. Missionary schools became key spaces for early drama and music education, laying the foundation for modern Ugandan theatre. The Namirembe Social Centre, served as performing space for the colonial administration and a few Ugandans (Kaahwa, 2004). By the 1950s, Makerere University had become the epicenter of theatrical activity, hosting interhall drama competitions and producing private theatre groups. The establishment of the National Theatre in 1959 and government support for cultural institutions post-independence further solidified Uganda's performing arts scene, which also began to reach rural communities through initiatives like the Makerere Free Travelling Theatre.

The 1960s saw the emergence of multi-ethnic performing troupes such as the Heart Beat of Africa, showcasing Uganda's cultural diversity. However, political instability and the abolition of kingdoms in 1967 disrupted these efforts. Symbolism and wordless drama became popular during the politically turbulent 1970s and 1980s as playwrights navigated censorship and repression. The performing arts survived through school competitions and grassroots performances, as many artists faced persecution. Despite these challenges, the late 1980s marked a revival of theatre as a tool for education and awareness, with both the government and NGOs commissioning plays to engage rural communities. Inter-school music and dance competitions in primary and secondary schools and colleges, at sub-county, county, district, and nation levels, became compulsory in the 1990s, with the Ministry of Education responsible for setting the syllabus, organizing the venue for the competition, as well as appointing the jury. The schools competed in: Ugandan traditional folk songs and dance, western choral singing, instrumental or vocal solos, sight singing, creative dance, instrumental composition, and original vocal compositions. Although there many groups of dancers emerging on the Ugandan traditional dance scene, the Ndere Troupe has been the biggest player in traditional Ugandan dance techniques and methods (both locally and internationally) dance since its establishment around 1984.

The early 2000s brought challenges and transformations to Uganda's performing arts, with audiences growing disillusioned by the quality of staged productions. This decline led to the rise of stand-up comedy, spearheaded by groups like Amarula Family and Theatre Factory, and a shift in performance spaces from theatres to bars and lounges catering for urban, corporate audiences. Theatres also saw increasing use by Pentecostal churches, further redefining their role. These developments highlight the adaptability and resilience of Uganda's performing arts, which continue to reflect the country's evolving cultural and social landscape.

Most performing artists in Uganda work on a part-time, self-employed basis due to the limited number of employment opportunities in the performing arts, and because the industry is small. In addition, drama has remained at amateur level where individuals carry out all the roles of playwright, director, main actor, producer, design, and are hardly any people who specialize in a particular role.

1.1.4 Design and creative services

Design consists of units mainly engaged in the creative, artistic and aesthetic design of objects, buildings and landscape. It concerns the use of art, technical skills, and critical thinking to produce innovative products that are visually appealing and serve a functional purpose. The design domain encompasses a broad range of disciplines, including; Fashion, Graphic and Interior Design, Landscape Design, Architectural and Advertising Services. Each discipline requires a unique set of skills and expertise to create designs that are tailored to a specific audience, purpose, and medium.

Graphic design combines text, images, and other visual elements to create designs for print or digital media. **Interior design** is the art and practice of making indoor spaces functional, safe, and beautiful. **Architectural design** is the art and practice of turning innovative ideas into tangible artistically expressive structures that serve a practical purpose - fulfill everyday needs. Architectural services are provided by companies or individuals concerned with all aspects of the built environment. Services primary include the design of new residential, commercial and industrial buildings, creating architectural plans for restoring new buildings and the supervision of the construction. **Industrial Design** specifically focuses on creating functional and aesthetically pleasing everyday products for mass production. **Advertising design** is the creation of campaigns and marketing materials that are visually appealing, persuasive, and effective in reaching target audiences.

1.1.4.1 Fashion design

Fashion design encompasses the creation of clothing and and other lifestyle accessories that are not only functional but are also visually pleasing. It combines artistic expression with tailoring expertise, resulting in innovative designs that enhance everyday life while reflecting



personal style and cultural trends. The history of fashion in Uganda reflects the evolution of cultural expression through clothing, shaped by indigenous practices and external influences. Originating with bark cloth in the 12th-century Buganda Kingdom, traditional attire symbolized tribal affiliations and social status. The introduction of materials like cotton and silk in the 15th century, alongside Arab and European influences, brought woven textiles and garments such as the *kanzu* and *gomesi*. The mid-20th century saw industrial growth with factories like Nyanza Textile Industries Ltd (Nytil) producing both traditional and modern fabrics, though political instability in the 1970s and 1980s led to a decline. The 1990s ushered in mass imports of second-hand and ready-to-wear clothing but also sparked a revival through designers like Sylvia Owori and Santa Anzo, who merged traditional textiles with modern styles. By the mid-2000s, a new wave of designers embraced Uganda's heritage while innovating within the global fashion landscape. The fusion of local and contemporary elements continues to define Ugandan fashion, symbolizing resilience and creativity amidst evolving cultural and economic dynamics. The local fashion industry is however hindered by public service standards that favour Western-style suits for office attire against African wear.

Uganda's garment manufacturing is majorly focused on production of suiting and uniform materials, corporate promotional wear, bed sheets, curtains, institutional and armed forces uniforms and a wide range of knits & smart coarse casuals. In particular, Uganda's textile and garment manufacturing steadily increased from Shs 210.12 to 531.59 billion; while leather and footwear increased from 45.87 to 74.06 in 2018 and 2022, respectively. The dip in production trends in 2020/21 was largely attributed to Covid-19 and related lockdown where people lost jobs and production reduced.

The Textile Development Agency (TEXDA), a textile training agency under the Ministry of Trade, Industry and Cooperatives, located in Bukoto, Kampala has in stock various types of equipment utilized during trainings in weaving, surface design and garment making. In addition, it provides advisory services to entrepreneurs, access to state of art equipment, raw materials production and research facilities. One of its biggest achievements is the making of costumes for the award-winning film "The Last King of Scotland (2007)" which was filmed in Kampala.

1.1.5 Audio-visual and interactive media

The audio-visual and interactive media category covers those creative industries which are delivered globally through TV and radio broadcasting, cinemas, video sales and rentals, as well as social media platforms. Interactive Media includes video games and social media platforms, such as Facebook, tiktok, and internet podcasting such as YouTube. The products and services include: music, films and other video content, animation services, television and radio programs; video downloads and streaming services.

1.1.5.1 Music

Music is an art of combining or arranging sounds (vocal and/or instrumental) to express ideas and emotions through lyrics, rhythm, melody and harmony. It includes live and recorded musical performances, music composition, music recordings, digital music including music downloads and uploads, and musical instruments. Music is one of the most powerful creative industries because of its ability to not only entertain audiences, but also tell a story and convey a message. Ugandans have been making popular music that has strong local cultural roots for a long time. Uganda's popular music scene emerged in the 1950s and 1960s, influenced by Congolese rumba and calypso, which artists like the great Elly Wamala localized (Klingenberg, 2019). Kadongo Kamu, inspired by traditional Kiganda music, was the first indigenous popular style in the 1960s.



Uganda Female Artist – Lilian Mbabazi in Studio

The political instability in the 1970s stifled the live music scene until the post-1986 period. Before 1993, there was a music drought in Uganda that would be unimaginable today, with only a few musicians like Philly Lutaaya, Afrigo Band, Elly Wamala and Jimmy Katumba and the Ebonies having mainstream music success. The only available sources were Radio Uganda (with only about 20% of its programming dedicated to music) and the several ‘discotheques’ and night clubs around town. Private music publishers/distributors publishers like Kasiwukira would get new popular music from abroad and record it on cassette tapes, which they would then sell through informal but effective networks of sellers (hawkers) (Kalungi, 2020). From the 1990s until about 2003, artists in Uganda would sell their ready albums to publishers (or contract with the publishers to pay for the production of an album in exchange for the ownership).

The local popular music scene regained its footing in the 1990s in the form of “karaoke” nights, launching many of today's top artists (Klingenberg, 2019). The introduction of FM radio in 1993, playing 18 hours of crystal-clear, CD-quality music from America, Britain and the popular Zairean music of the time (Kalyegira, 2013), transformed listening habits, it further boosted access to both local and international sounds. The local music recording industry began in the 1990s. Before this, artists travelled to Nairobi for recordings, often losing song rights due to unfavorable contracts. The rise of studios such as Talanta and Dungeon expanded the industry, blending traditional Ugandan sounds and instruments with modern styles. Despite urban popular music's dominance, traditional music and instruments remain integral, particularly in rural areas, reflecting Uganda’s rich cultural heritage. There is a growing scene

of venues, festivals and other places to see music and this is helping to support and nourish the industry. There are a good number of studios in Kampala able to record music, (British Council, 2014).

1.1.5.2 Film and video

Film and video concern the use of moving images (motion pictures) to convey ideas, stories, and emotions. As an art, film and video combine different forms of art such as music, performing arts, writing, fashion, cinematography, animation, and editing (Damasio, 2022). This demands strong technical abilities in storytelling, visual design and editing to achieve high-quality filmmaking. Uganda's film industry has been deeply influenced by its political history, beginning under the Colonial Film Unit (CFU) in the department of Ministry of Information, Broadcasting and Tourism in the early 20th century (UNESCO, 2021; Dipio, 2014). Initially, film was used as a tool for education and cultural assimilation during the colonial era, with 21 cinemas operating by 1959. Despite these developments, locally produced "art" films failed to garner significant audiences, partly due to strict censorship. Efforts to train Ugandans in filmmaking began in the 1960s under UNESCO's Expanded Programme of Technical Assistance but were disrupted by the country's descent into political turmoil and authoritarianism between 1966 and 1986. This period also saw the expulsion of Asians under Idi Amin's regime, leading to the closure of major cinemas and a shift in focus to Uganda Television (UTV) as a primary entertainment medium.

In the late 1980s and early 1990s, Ugandan drama groups like the Ebonies adapted their stage productions for television, sparking interest in screen entertainment. During this time, African films began to air on Ugandan television, offering a glimpse into the continent's cinematic potential. The relative peace and government liberalization policies of the 1990s further spurred the domestic film industry's growth. Hollywood and Indian films became accessible through VHS tapes and DVDs, while filmmakers like Mira Nair, with her award-winning work such as *Salaam Bombay!*, inspired budding Ugandan filmmakers. Nair's Maisha Film Lab, launched in 2004, played a key role in nurturing local talent and setting the stage for a more robust film culture (Dipio, 2014).

The influx of Nigerian films in the 2000s, driven by liberalized airwaves and private TV stations, also had a transformative impact on Uganda's film landscape. Nollywood's popularity fuelled the rise of "small-screen cinemas" like video halls and performances by video jockeys³ (VJs), making cinema accessible to low-income groups. By 2010, the decline of DVDs and the rise of online platforms marked a new chapter for the industry. Films shifted to digital distribution, reflecting broader global trends and cementing the foundations of Uganda's modern film industry. The bulk of the audio-visual productions in Uganda are music

³ Creative artists who translate the films for the non-English speaking audiences. They often add, misinterpret and twist the reality in the movie to suit the interest of their audience

videos, followed by television advertisements and then film for the cinema/entertainment (The East African, 2016).



Photo by Nabwiso Films

1.1.5.3 Radio and television broadcasting

Radio and television broadcasting involves the creation, production, and dissemination of audio-visual content to a widely dispersed heterogeneous audience. They offer a wide range of content, including news, sports, drama, comedy, documentaries and more, which caters to different tastes and interests. Television broadcasters normally pay a license fee for the right to broadcast a particular film or television programme for a limited number of times or period in a specified market. Alternatively, a broadcaster can choose to co-finance a programme and thus participate in the sale of rights to other broadcasters. The broadcasting landscape has changed dramatically in the last decade, with the sector being seen as one of the pillars of the new economy.

With technological innovation bringing about convergence of telecom, Internet and audio-visual services, broadcast media has expanded into the digital realm, opening up new opportunities for mergers and joint ventures, public and private companies have raced to adopt new media services. allowing for on-demand access to content.



Radio Broadcasting Session

Radio broadcasting in Uganda began with the establishment of the Uganda Broadcasting Service (UBS) in 1954 by the colonial government, primarily to serve as a communication tool in English and Swahili. Renamed Radio Uganda after independence in 1962, alongside Uganda Television (UTV), launched in 1963, became vital instruments for the government to promote national unity and disseminate official news. These state-controlled broadcasters symbolized governmental authority, with Radio Uganda being particularly central to political coups from the 1960s to the early 1980s (Lugalambi, Mwesige, & Bussiek, 2010). The liberalization of the media sector in the early 1990s marked a significant turning point. The first commercial private FM radio came on air in December 1993, breaking the monopoly of the national broadcasters. Similarly, the first private TV station was launched in 1999. The growth of the sector has been dramatic ever since. The number of FM licences shot up from 14 as of December 1996 to 300 as of October 2020, and that of private TV stations from 4 to 47 (40 Free to Air (FTA) and 7 pay TV stations), over the same period. This growth has fostered a vibrant radio and TV broadcasting landscape, offering diverse content and viewpoints. Radio Uganda and Uganda Television were merged in 2005 with the passage of the Uganda Broadcasting Corporation (UBC) Act, which purportedly created a ‘public broadcaster’. The two stations are now referred to as UBC Radio and UBC TV.

1.1.6 Literature and publishing

Creative writing, traditionally referred to as literature, is an art of “making things up”. It is writing that expresses the writer’s thoughts and feelings in an imaginative, artistic and entertaining way. It comprises fiction (i.e., novels, poetry, scripts for drama/plays, films and TV, song lyrics, comic books, etc.); and nonfiction (speeches, memoirs, and personal essays).

The English Department at Makerere University College provided a platform that generated the foundation of creative writing in Uganda (Wanjala, 2021). The other school that influenced the development of a literary tradition in East Africa in the 1960s was the Song School in East Africa, which was founded by writers who grew outside the University. It ushered in the idea of expressing nationalism through creative works. The students of this

school came up with poems that were written in a manner that attempted to cultivate a certain sensibility and tolerance of local and regional cultures through the use of language. One of the graduates of the song school is Okot p'Bitek who wrote and published the *Song of Lawino*, probably Uganda's best known literary work to date, in 1966 (Kyomuhendo, 2001). Its success did not only encourage Okot to write more 'songs', it also inspired a number of imitations of the genre and sparked off a flourish of writing in English that continued well into the 1970s. However, the political trends in the mid 1970s to early 1980s (the 'silent years') reduced Uganda to a 'literary desert'. Some writers were killed, many went into exile, and others were simply silenced. Writing was 'under siege' and foreign publishers fled the country.

Promise returned after 1986, when relative peace prevailed in Uganda. There was a rise in indigenous publishers and a new generation of creative writers emerged, many of whom were women. FEMRITE, an association of Ugandan women writers was created in 1996, with the aim of publishing and promoting women's literary works. A so-called '*middle class*', whose children read and value books, has since emerged. However, whereas the emergence of technologies has made books and periodicals more accessible, the literary works have not yet gained their rightful place. As in many African societies, which are rooted in oral traditions, the pre-colonial sources of entertainment and information (i.e., oral storytelling, poetry recitals, music, dance, drama and proverbs) are still by and large the most accessible media. The most factors conspiring against the development of reading habits are illiteracy and poverty. Literature by Ugandan authors has increased in quantity and quality, evidenced by winning of local and international awards and inclusion on the school syllabus with the novel as the most preferred type of literature (52.70%) followed by the play (32.3%). Poetry at (13.51%) is the least preferred. Commissioned work in writing is the biggest source of earning for creative writers (Batenga, 2016)⁴. The publishing landscape has grown in numbers of indigenous publishing companies and outfits. With digitization, new publishing platforms have come-up, most of them online, which provide outlets for their publishing activities.

1.2 Rationale and justification of the study

In more recent time, the cultural and creative industries have become objects of great attention from different areas as economy, politics and public management (of the cultural areas and development of Uganda).

Due to their high potential for job creation and domestic revenue generation, the Government of Uganda has identified the creative industries as a priority area, with intent to provide favourable conditions for its development. Through its rich cultural heritage and unlimited pool of talents, Uganda has the potential to develop new areas of wealth and employment, however, it is still a marginal player in the regional and global market of creative goods and services. The creative industry remains poorly structured, with creative products largely supplied through the informal economy. Despite having global award-winning artists, the economic contribution of creative and cultural industries to the economy has either not been properly quantified due to limited access to data or remained insignificant at only 3.5% of GDP in 2017 and 4.5% of total direct employment in 2014 (AFD, 2021).

⁴ One published author with a title on the school syllabus said "I can earn UGX3.5 million for a ten-page story and about 25 million for a full book"

There is still a gap in the policy, legal and regulatory frameworks and the creative sector is often overlooked by public and private investment. Regulation of Uganda's cultural and creative industries (CCI) is spread across several ministries such as MoGLSD, MoTWA, and MoICT&NG, leading to inefficiencies, confusion, and high compliance costs for industry stakeholders. Persistent piracy of creative works and copyright infringements restricts the revenues of cultural and creative professionals, practitioners and companies and slows their growth and ability to create jobs. It also discourages investment in content production, limiting the financial viability of Uganda's creative industries.

Due to lack of incentives, financial, educational, infrastructure and technology support from the government and the private sector, Uganda's creative industries are not yet fully developed. The lack of a supportive tax policy for Uganda's creative industries places a significant financial strain on the sector. Direct government funding to the creative industries is limited and has been selectively provided to a few groups of the creative industry. The rigid requirements to access existing government financing initiatives such as the Uganda Women Entrepreneurship Programme (UWEP), the Youth Livelihood Programme (YLP), and the GROW program overlook the unique working structures of creative professionals, who often work independently or from home, limiting their ability to benefit from these programs. Although the Security Interest in Movable Property Act, 2019 supports intellectual property (IP) as collateral, financial institutions have been slow to adopt this practice, thereby limiting capital access for creatives. These challenges make the creative industry one of the most vulnerable sectors.

Strategies for development of the creative industry have not been properly integrated into the national development planning and budgeting frameworks. Building on the mapping study of the culture and creatives sector conducted by the Ministry of Gender, Labour and Social Development (MOGLSD) in 2022, and a Study Report on the Regulation of the Culture and Creative Industry in Uganda (ULRC, 2024), the National Planning Authority investigated the peculiar issues of the different creative industry domains in Uganda using a value chain approach and suggested policy recommendations to foster the creative industry. The study also informed the fourth National Development Plan (NDPIV) by designing strategies for nurturing and developing the creative industries in Uganda to contribute to job creation and domestic revenue.

1.3 Objectives of the study

The study aimed to understand the economic, social, cultural, and educational potential of Uganda's creative industries and designed strategies for nurturing and developing them to effectively contribute to job creation and domestic revenue.

The specific objectives were:

- i) To determine the contribution of the creatives industry to employment and domestic revenue;
- ii) To undertake a value chain analysis of selected creative industry domains in Uganda to determine the peculiar aspects and challenges faced in harnessing the employment and revenue mobilization potential of the creatives industry in Uganda;

- iii) To conduct a detailed analysis of the existing policy and institutional frameworks governing the creative industry to determine their effectiveness, challenges and recommendations for improvement; and
- iv) To provide actionable recommendations on the strategies needed to improve the employment and domestic revenue mobilization potential of the creatives industry in Uganda.

1.4 Methodology/approach

The study employed both qualitative and quantitative approaches. Both secondary and primary data were used to conduct the anticipated analyses. Secondary data were obtained from relevant publications and reports of state and non-state actors including; MoGLSD, UNESCO, MoES, ULRC, UCC, URA, UNCTAD and UNDP among others. Primary data was collected using Key Informant Interviews and focus group discussions with creative professionals, practitioners, regulators, development partners, academia, civil society organizations and private sector players. A field survey was conducted across the 15 sub-regions; Greater Kampala Metropolitan area, North Buganda, South Buganda, Ankole, Kigezi, Tooro, Teso, Karamoja, Lango, Bunyoro, Acholi, and West Nile where the creative artists, policy makers, academia and implementers were consulted.

With regards to analysis and reporting, the assessment was mainly descriptive and narrative in nature to fully understand how Uganda can leverage on the creative industry for job creation and domestic revenue mobilization.

The study adopted the value chain analysis approach over other models like the ecosystem mapping, gender analysis, and the ELMA study due to its ability to provide a comprehensive and systematic understanding of value creation across the creative industries from creation to consumption. The analysis was conducted for all relevant activities and actors that play a role in the creation, production, distribution, exhibition and consumption of the creative product or service, as well as the interrelation between those actors within the selected creative domains were assessed.

1.5 Scope of the study

Given its broad use, this study adopted the 2009 UNESCO Framework for Cultural Statistics, which categorizes the CCIs into 6 groups: Visual arts and crafts (fine arts, photography, crafts and culinary arts); performing arts (drama, dance, traditional/folk music, cultural festivals, fairs, and feasts, Stand-up comedy, etc.); Audio-visual and interactive media (film, animation and video, music, TV and radio (live streaming online), Podcasting Video games); Design and creative services (fashion design, graphic design, interior design, landscape design, architectural services, and advertising services); literature and publishing; and cultural and natural heritage (libraries & archives, museums, archaeological and historical places, botanical & zoological gardens, and natural reserves).

2.0 Value chain analysis of Uganda's creative industry

Value chains can be defined as the full range of activities which are required to bring a product or service from conception, production, delivery to final consumers and final disposal. The value chain analysis aims to improve the understanding of key actors and their roles, identify gaps in the various steps of the value chain, market opportunities and the reasons for market failure.

2.1 Overview

The UNESCO 'Culture cycle' concept (UNESCO, 2009), asserts that all the creative industry segments consist of initial creative ideas, which are usually combined with other inputs to produce creative products or services, which then move through a series of interlinked stages before they reach the final consumer including; creation/composition, production/publishing, marketing/distribution, and consumption. However, despite the many commonalities among the different domains in the creative industry, the structure of the value chains may differ for some domains. The structure of the value chain for visual arts tremendously differs from the film, music and design. In the context of increased digitization, the creative value chain is regarded as a network, where the different nodes interact in real time, instead of a pipeline, where value is added to a product or service at a particular stage and then passed on to the next stage. It is possible that the same actor takes charge of several links at the same time - For example, an author can write their text online at the same time that the designer/publisher works on the web template and readers comment on the draft version of the work, in order to suggest improvements (UNESCO, 2017)⁵. For some cultural and creative activities, the process can start at any stage of the value chain, while some phases maybe combined or do not exist as, for example, in the case of heritage where creation may be said to have occurred in the past.

2.2 Creation/composition

This stage concerns the elaboration and/or authoring of artistic ideas, content and original creative products and the making of one-off production. The creation stage is the supply side of all domains of the creative industry. Ideas and themes are generated for performances, scripts, lyrics, music scores, and dance sequences. Most often the community is engaged and participates in reading and workshops to refine the scripts before full production takes place.

- i) **Cultural and natural heritage:** In the case of heritage, creation is said to have occurred in the past. However, some activities such as identification and recording of cultural and natural heritage assets, historical research, archaeological surveys, and detailed documentation of intangible practices take place. In addition, protection and maintenance of the integrity of heritage sites is continuously undertaken through restoration, maintenance, and appropriate management practices, as well as, development of engaging narratives and educational programs to convey the meaning and significance of heritage to visitors, often through guided tours, exhibitions, and multimedia experiences.

5 UNESCO (2017). UNESCO Global Report "Reshaping Cultural Policies". Paris, UNESCO. Available at: <https://unesdoc.unesco.org/ark:/48223/pf0000366500> (Accessed 30 April 2024).

- ii) **Visual art and crafts:** The creation process always begins with the artist or artisan conceiving an idea that he/she wants to express or communicate with his/her audience before choosing the medium. In the case of the visual artist, the artist often responds to his/her environment. Origination of a crafts idea is usually not with the artisan but with individuals or groups who see the opportunity for trading on heritage “products” and souvenirs. The creation of crafts is often influenced by the need to survive, with many artisans earning their living from sales of craft products. However, traditional practice and heritage (including cultural rituals) are also contributing factors. Ugandan artisians are increasingly responding to locally available raw materials including wood, stone, fibres, raffia, papyrus, palm leaves, natural dyes and wax, beads, glass, clay, discarded plastic packaging, wire and other “waste materials”.

While there are formal and informal structures which support the creations that lead to production, most visual artists work in isolation from each other and knowledge is not shared when it comes to new ideas, feedback or discourse. Similarly, when visual arts and craft workshops take place to motivate production and ideas, they are more focused on skills development and material response than on developing creative ideas and passing on intellectual knowledge. This is not only restrictive to innovative approaches to the environment and the production process, but also does not allow for sufficient understanding to be able to gauge sectoral opportunities and demand, or use responses constructively.

- iii) **Fashion design:** In the fashion industry, the creation process involves designing, prototyping, pattern-making, and manufacturing garments and accessories. Designers draw inspiration from a wide range of sources and uses his/her knowledge of current trends and target markets and availability of fabric to conceptualize the style of the product. The traditional design techniques of drawing sketches on paper and wrapping fabric on mannequins have been replaced by computer-assisted design techniques.
- iv) **Music:** The foundation for music is song writing (lyrics) and music composition. The named performer on a music track (the musician) is not necessarily responsible for both of the components. There are artists who perform their own works and there are others who perform someone else’s composition. Today, many songwriters in Uganda are also recording artists (musicians). They record their own music and write music for other recording artists. However, in most cases, the songwriter or music composer is at the very end of the remuneration chain. The ownership rights for the composition are typically overseen by the music publisher and relevant collective rights management organisations, which act on behalf of songwriters and composers. Once a song is composed, the **publisher** promotes it to the music producers or directly to record companies/labels (if the songwriter performs his own composition). The publisher also licenses and monitors the use of tracks, ensure it gets radio airtime, and collects and distributes royalties to composers and songwriters. The motivation of a music publisher is the expectation to receive a share of the copyright for the composition. In the case of Uganda, the music publishing business is low due to persistent music piracy. Between 2003 and 2006, cheap computers flooded the market and anyone with a CD burner could sell music. **Collective rights management bodies/organisations** collect royalty payments from users of copyrighted works and distribute royalties to copyright owners. In general, revenue is paid to a right collecting organisation, where it is then redistributed to publishers.

Most of the local music content lacks originality and uniqueness that can be identified as Ugandan on the international stage. The contribution of Uganda's rich and diverse indigenous culture into the content of local creative industry in terms of materials, styles or patterns transferable to modern trends remains limited. For instance, the amount of "message" in the mainstream music has diminished over time, with artists focusing more on a danceable beat than singable lyrics and a good story (Klingenberg, 2019). In the case of visual arts and crafts the people involved work in isolation of each other and because productions are prompted by demand (for example the tourist market), they turn out with similar products.

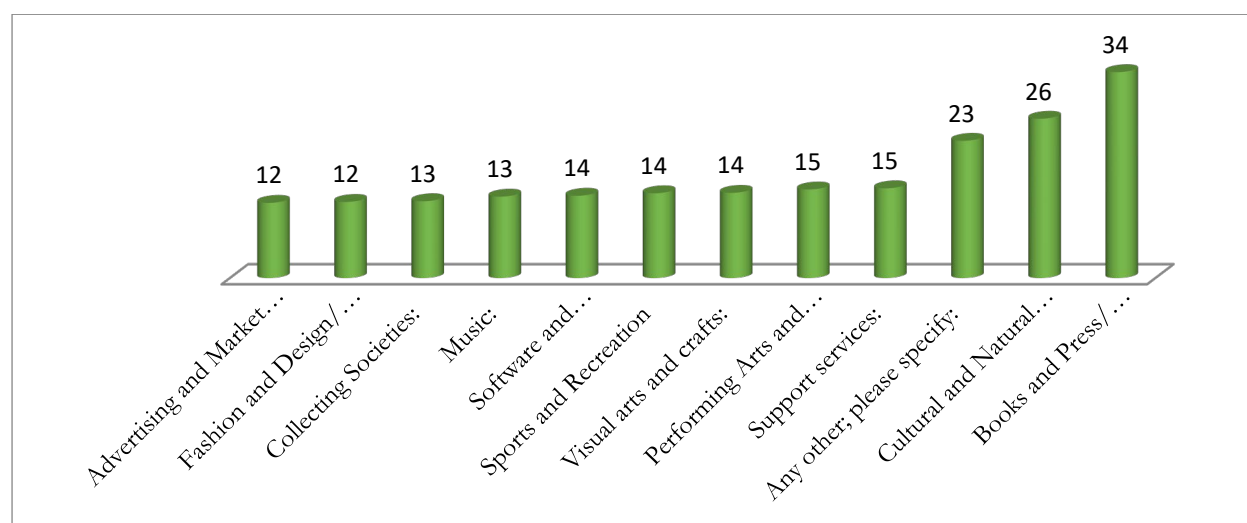
The trade of authors (including content writers and composers) is not readily marketable in Uganda and therefore, they cannot easily establish themselves as professionals in their own right. A number of creatives who participated in this study noted that clients do not value their work, leading to lower earnings. They rely on digital platforms to create, distribute, and monetize their content.

- v) **Film & video:** The film idea is validated by the producer(s). The film and video industry has a number of specialised or functional responsibilities. The creative team (i.e., **script writer and director**) creates a screenplay (the story) as per the set industry standards using a software like Movie Magic; The director supervises the formulation of a storyboard (i.e., a visual representation of a film sequence - break down of the action into individual panels) and assembling of a crew (i.e., a group of workers on a film set who are responsible for facilitating production (as opposed to acting)); **The producer** is also responsible for scouting locations where the film will be shot. The casting (i.e., choosing actors to play roles) is spearheaded by the **casting directors**; **The stylist and costume designer** is tasked with purchasing, creating or tailoring the clothing that the actors wear and makeup for characters for a production; Because of the highly capital-intensive nature, some film makers sell their film in advance to specific investors or broadcasters, in a process referred to as "pre-sales" (De Voldevere, Et' al, 2017). Uganda's film industry is experiencing significant growth, with filmmakers telling impactful stories that resonate globally, earning nominations in prestigious awards like the 2024 Africa Magic Viewers' Choice Awards. Regulations require filmmakers to obtain location permits, with specific rules for filming in public spaces, private property, or national parks. The country's cinematic appeal has attracted international productions such as *The Last King of Scotland* and *Queen of Katwe*. Ugandan filmmakers often draw from indigenous folklore and heritage, transforming public domain stories into films through improvisation due to budget constraints. Over 95% of Ugandan films are rooted in indigenous knowledge, showcasing the country's rich cultural narratives.
- vi) **Radio and television broadcasting:** Radio and TV broadcasting follows scheduled programming, allowing viewers to tune in at specific times to watch their favorite shows or events. The main creative people in the broadcasting sector are: the programme script or screenplay writers; the programme directors; the reporters, hosts/presenters; guests; and off-camera narrators (anyone whose voice is heard or who appears on camera). The script or screenplay writers are often media researchers or journalists who originate or develop programme ideas, drawing on their knowledge and understanding of industry requirements and narrate what is to be discussed or presented during the programme.

vii) **Performing arts:** The creation function of the performing arts encompasses the conceptualization and creation of an original artwork such as the script of a play or choreography for a dance performance. It involves; the playwrights, composers, choreographers for a dance performance, directors, and other creative professionals who conceive and develop the artistic material that forms the basis of performances. Notably, there are actors/artists who generate their own ideas and themes, provide guidance and direction to performers and creative teams to ensure the realization of the artistic vision and then further perform the concept live on stage. Creation of a play, music and choreography scripts requires various inputs including; research, rehearsals, skilled people and digital tools for scriptwriting, music composition, and design, all aimed to foster a vibrant and sustainable creative ecosystem. In Uganda, the creation stage involves a blend of traditional practices and modern influences, deeply rooted in the country's rich political and cultural heritage. Generations of Ugandan playwrights have been pre-occupied the lives, the struggles and hopes of the Ugandan people as dramatized on stage (Kiyingi Muddu, 2010).

There are few masterclasses and mentorship programs by experienced professionals to enhance the skills of the young talents to enable them create unique and rich content. Many highly knowledgeable performers and experts of indigenous music and dance products, that are performed by cultural troupes, pass away without grooming the next generation. Consequently, there are few surviving community troupes with members who perform authentic music and dance cultures. The average years of experience in Performing arts is 15 years (Figure 2), which is low compared to domains like literature and book publishing, which have participants with extensive experience averaging 34 years (MoGLSD, 2014).

Figure 2: Disaggregation of CCI domain by experience (average years)



Source: MoGLSD (2014)

There is a shortage of trained and professional playwrights, and even those who practice playwriting do so on a part time basis (Ngobi, 2022). This is evidenced by the current dominance of foreign plays in Uganda's high school literature syllabus. It is escalated by a poor reading culture in the country. Another threat curtails a culture of critical thinking and analysis which has trivialized theatre. Most drama have been

developed by improvisation. There was Bakayimbira Dramactors and Black Pearls that appeared to have fully scripted drama for some time. At times the true script writers were not mentioned in adverts because producers kept on fronting names that attracted public interest.

- viii) **Literature and publishing:** The creative writing process starts with prewriting. The author plans his/her writing; chooses a topic (for which his/her ideas can be supported with details), audience, purpose (whether to inform, to persuade, or to entertain), and form (writing books, creating illustrations, informal writing of diaries, notes, memoranda, etc. (Abidi, 2022). The author gathers ideas (through observation, experience, imagination and studies); and arranges them logically. The other creative people involved in the creation of literary works are the illustrators (in the case of comic books). This is followed by drafting and peer evaluation/editing, where constructive ideas are sought from fellow writers.
- ix) **Culinary Arts:** The creation stage of the culinary arts domain combines creativity, education, cultural influences, collaboration, and market responsiveness in order to create unique and meaningful dining experiences that resonate with consumers and contribute to the broader culinary landscape. The culinary artists (the chefs) draw upon their knowledge, experiences, artistic values and cultural backgrounds to innovate and create unique dishes. This innovation is not only about new recipes but also about reinterpreting traditional dishes, integrating diverse culinary techniques, and experimenting with ingredients to create novel gastronomic experiences. Collaboration among culinary professionals, including chefs, nutritionists, and food scientists allows for the sharing of ideas, techniques, and knowledge, leading to the development of more sophisticated culinary products. Additionally, engaging local communities and stakeholders in the culinary creation process can enhance the authenticity and appeal of gastronomic offerings.

This stage of the culinary industry is often constrained by market acceptance, time limitations, professional skills and practical experience (Lin & Baum, 2016). Food artistry requires time to acquire skills, which can also be acquired on-the-job (from an expert, by observation). However, emphasis should be more on creating, carving, moulding or arranging the food on the plate.

2.3 Production/publishing

This stage relates to activities, which help to turn an idea or original work into a creative product available for consumption/use. Producers/publishers play a pivotal role in the value chain for creators to reach out to customers and monetize their creativity. The pivotal role of the producer/publisher has resulted in dominant positions in the value chain, with stronger bargaining power than the creators themselves. This is the case especially in the music, film or book publishing sector.

The digitization has influenced the production stage of the creative industry as the technology favours self-production. It has brought new tools and techniques to automate or increase productivity of internal processes in all creative fields. This has lowered the barriers for creators to internalise parts of the production process, especially where traditionally

specialized and often (very) expensive equipment was needed: photographic and film equipment, music recording studios, etc.

i) **Cultural and natural heritage:** The artefacts (whether paintings, craft objects or performances) are meaningless without a value system and a production system that gives it value/meaning. For example, a country will want a particular site recognised, as being of national or outstanding cultural heritage and it will want to mobilise the assets of tourism, transport, preservation and hotels to capture the value of paying guests. Therefore, innovative ways to present and utilize heritage assets, such as cultural performances, artisan workshops are designed, themed tourism packages, or digital experiences.

ii) **Visual art and crafts:** The production process of a visual artist and artisan starts with the gathering and sourcing of the materials that are needed for the creation of the artwork. Visual artists usually work individually, but some are helped by family members, friends or apprentices. Likewise, in the process of crafts production, the crafter (artisan) is mostly anonymous. Production of visual arts involves different medium and technique depending on the artwork, whether 2-dimensional arts like painting, drawing, and printmaking or 3-dimensional arts like sculpture, architecture and interior design.



Source: Stylistic Tendencies

iii) **Fashion design:** The fashion production process starts with garment construction; Garment construction involves cutting-and-sewing of fabric based on the design patterns and garment samples that are created according to the fashion designer's sizing structure. Fashion designers may work with textile manufacturers, seamstresses, and artisans to produce their collections. The completed garments undergo quality control (especially on the finishing⁶) before mass-production. Hangtags are then attached to garments to provide information such as fabric content and care instructions. Labels are attached to identify the brand name or the designer. A majority of workers at this stage of the value chain are semi-skilled female youths in the age range of 18 to 35.

There is limited local fabric production. A very limited selection of fabrics is produced in Uganda. Materials like polyester, threads, and zippers are mostly imported, raising production costs, which adds to costs of Ugandan-made products.

iv) **Music production:** This stage of the music value chain concerns the process of recording and producing music. It includes music composition, music arrangement, sound design and production, audio mixing, and audio mastering. **Music composition** concerns the establishment of musical ideas including; the song genre, vibe and style. This is done by the music producer. **Music arrangement** is about putting the song in

⁶ Addition of decorative elements (embroidery, beading); buttons and buttonholes, hooks and eyes, snaps, zippers, and other fasteners; hems and cuffs; and brand-name labels and other labels (maintenance instructions) specifying fibre content, laundry instructions, and country of manufacture.

its correct order i.e. creating a melody or an instrumental (tracking), voicing (putting the vocals) and arranging the verse, chorus. **Sound design and production** involves editing, sampling and sound manipulation using effects and production techniques. **Audio mixing** involves balancing sounds and frequency i.e. combining multiple layers of audio to make the final song. Knowing how to mix is a skill that is perfected through practice. **Audio mastering** involves making all the elements of the song cohesive, reaching commercial loudness, and playback optimization. The production aspects of live performance are closely tied to the delivery mechanisms and platform. Delivering music to a live audience requires arranging a live venue and setting up public address and sound engineering systems. Lighting and special effects engineering, as well as event and stage management functions can also be performed to enhance the quality of a live performance.



A standard music recording studio

Apart from the lyrics and melodies written by the songwriters, the rest of the song composition is done by the producer, including the harmonies in the track, though they may be implied by the melody. Unlike the musicians of the earlier band era, who were all talented instrumentalists and vocalists, most musicians in Uganda today are vocalists, only few have training on instruments. Consequently, musical responsibility in Uganda has shifted to the shoulders of the producer. Today there are around ten proper recording studios, with a Digital Audio Workstation (DAW), a software used for recording, editing and producing audio. There are also a number of smaller demo studios, where artists playback (backing tracks sequenced and played from a computer) popping up in Uganda (Rorvik, 2017).

A Record Label or recording company often scouts talent, identifies artists with a good social media presence, and negotiates with them to sign a recording agreement. In the case of artist signed to a record label, the label owns the sound

recording copyright and is responsible for the production of the music recording, the manufacturing of copies (in case of physical music production), the distribution to retailers and the marketing of the music. Because the record label believes in the market potential of the signed artists, it pays an advance to artists to fund the recording costs, which is then deducted from royalties, collected from subsequent sales (De Voldevere, Et' al, 2017). The artists who choose to sign up to a record label do so to benefit from a label's resources, experience and expertise, while also drawing on their creative input and marketing power. There are few credible local record labels in Uganda, most notably Swangz Avenue. However, most of the companies that are referred to as labels are merely artist management companies. Global record labels have started investing in Ugandan artists, with two Ugandan artists having signed up to Sony Music Africa (an American global music conglomerate) so far.

The taxes imposed on music instruments has made investment in high quality audio production facilities very costly. Music recording is unaffordable for most artists, many of whom are not signed to any record label. With only a few record labels, a majority of the artists pay for song writing (if they do not have their own song), production (including the producers' fees and studio time), video production, and marketing (Klingenberg, 2019)⁷. They also pay for their styling (hair, makeup, and clothing) and for the entourage they have around them. The huge financial burden on artists is a limiting factor in the local music sector growth.

Most music producers in Uganda today are in the digital audio workspace, which has little correspondence to traditional Ugandan sounds, other than the language, Ugandan music lacks distinctiveness, often failing to represent local culture adequately. In addition, emerging technologies like AI have disrupted the music industry through music cloning and automation, with unclear monetization strategies.

- v) **Film production:** The production phase refers to the period of time when the film is actually being shot. Some aspects of production include: direction, camera operation, lighting, sound recording, and acting. **The director** oversees all aspects of the production and works closely with the actors. The **cinematographer** oversees camera operation and lighting plan. The **camera operator** operates the camera. All the departments and positions aim to capture the sound and image necessary to tell the story. The **film editor** oversees cutting and compiling shots into a coherent whole.

The actual size and structure of Uganda's film industry remains unknown, It is estimated that there are 1,474 self-profiled film producers, 1,769 film production MSMEs, 97 international fixers and 1,189 production managers (Steadman Global Consulting Limited, 2020). The Uganda Communications Commission (UCC) launched a local film funding scheme, the Content Development Support Programme (CDSP) in 2021 to provide financial support to Ugandan production companies and individuals to develop audio visual content that will in turn create job opportunities, generate revenue, promote skills development, and grow domestic audiences. In the first year of its implementation, the UCC provided a grant of Shs 503 million to four (4) local film projects. As part of Program's second cohort, 14 locally scripted films

⁷ Which includes paying to have their song played on the radio and their videos played on television, payments which the broadcasters do not want to admit to but that are necessary costs, borne by the artist

and drama projects in five categories: animations, short films, features, documentaries, and television dramas, were granted Shs 1.2 billion (UCC, 2023).

The taxes imposed on film equipment makes film production very costly. An import duty (10%) is levied on imported film equipment (including digital cameras, television cameras, and video camera recorders) per consignment. This is in addition to 18% for Value Added Tax, and a withholding tax of 6%. Nearly 70% of the film producers in Uganda rent production facilities and equipment. Due to the high film production costs, a number of film producers end up selling their film ownership rights to the sponsors/investors.

Uganda's film industry is highly centralised around Kampala. There are few film activities taking place in other regions around the country. Most of the film infrastructure such as cinemas, film training institutions, government film regulation offices and even the filmmakers themselves are concentrated in Kampala. 60 per cent of people working in film making are freelance and based in Kampala and other major towns in Uganda. (The East African, (2016)

Radio and television production: This concerns the making of audio-visual programme content to be presented on TV or Radio. Radio and TV programmes can either be recorded or 'LIVE' or pre-recorded (delayed transmission) or a combination of both. The programmes can be produced either within the controlled environment of an indoor studio or outdoor. This stage requires the creativity of **the producer** in terms of sound manipulation and other special effects. The producer identifies the talent people and assigns them an appropriate role. For TV broadcasting, the lighting director (LD) designs the lighting plan, arranges for the lighting equipment, and sets up and checks the lighting. The makeup artist ensures that the reporters, hosts/presenters, guests look their best on screen. The final stage in radio and TV production is programme presentation. The **programme director** is primarily the main creative force behind a radio or TV programme. He/she translates programme script into what is presented and/or shown on the TV screen. He/she chooses the right presenter for the right including; newscasters/ newsreaders, Disc Jockeys or Video Jockeys (who present musical programmes); talk show hosts/moderators.

- vi) **Performing arts:** Production in performing arts concerns the process of turning a drama or dance from a mere concept (script) to an actual presentation before a live audience. Production involves elements such as: casting; stage and costume design; premarketing and promotion; contracting of performers, technical staff and venue; tour management; and rehearsal for live and pre-recorded plays (stage and radio). The **producer** (whether an association, individual company, commercial society or a public organisation) is responsible for bringing together physical, human and social capital necessary for the concretization of a performance. He or she bears the financial risk of the project, hires artists, technical crew/designers and administrative staff and negotiates with promoters, distributors for the dissemination of the performance. For "commercial" performances, such as musicals, producers can possibly also take up the public and private financing and organisation of the production. She/he negotiates with promoters, distributors and the consumers. After the production they can either present the performance in an own venue (the producer here combines both production and

dissemination) or sell the production to one or more other local and/or foreign venues through agents/promoters. There are tendencies of **co-production**, where a performance is produced with several partners together. In the context of limited public funding, co-production is a way to bundle resources more efficiently.

The core performers at this stage, can be actors, dancers, singers/musicians. Sometimes, these are already involved from the creation stage and can play a role in the dissemination of the drama, dance or music. Noteworthy, the performer can be a member and signed to a particular performing group or independently sourced or hired to deliver a given assignment. Nowadays, a lot of performing artists (45%) combine the functions of both performer and producer (in the form of director or choreographer) (De Voldevere, et' al, 2017).

The **director or choreographer** works with performers, musicians, and other creative team members to improve and develop the artistic material through rehearsals and workshops. The conceptual and theoretical depth of a production is dependent on suitable rehearsals, which allow a work of art to emerge as a supposedly life experience with appropriate variations and placement of focus. **The set designer** is responsible for the physical stage setup providing the ambiance that the director and playwright intended. He/she works closely with the **lighting designer and sound engineer**. The costume and makeup designer is responsible for ensuring that the performers look believable in their roles. The bigger performing arts institutions such as Ndere Troup, have their costumes and design made in-house. Most performing groups in Uganda, however, make arrangements with someone who is able to produce the necessary material. There are cases where costumes are designed or hired from other players in the industry for the period of a project.

The performing arts industry in Uganda is constrained by shortage of key inputs, include; financial resources for acquiring costumes, skilled personnel for directing, lighting and stage setup, favourable spaces for rehearsal and performance, costumes, technical and equipment. This has resulted in poor; designing, stage management, and directing as well as stereotyping. Lighting designers and sound engineers in Uganda's performing arts industry occasionally resort to utilizing low-quality equipment.

There is lack of skilled/trained drama directors. There are only four trained drama directors in the country who trained in USA, Russia, and another in Australia, plus a few who teach drama at university. This is important because even when a script is great, if the director is not equally skilled, the drama production will die. There are cases of disorganized stage business, inadequate and inappropriate articulation, insufficient production and performance techniques, inappropriate performer-audience relationship, and poor performance standards reveal the inadequacy in managing rehearsal processes within Uganda's performing arts industry (Muhumuza, 2014).

- vii) **Literature and publishing:** The book publishing stage involves commissioning and acquisition of literary works, copy-editing, proof reading (checking for errors in spelling, grammar usage, capitalization, and punctuation), rights management (primary and secondary rights, i.e. rights connected to initial publishing and distribution), typesetting, layout and design, printing and binding, insurance and shipping. This encompasses financial aspects such as author's royalties and pre-payments. **Book**

publishers are in charge of the “quality” of the edited product, in terms accuracy of content as well as from a technical point of view (e.g. quality of the paper and the ink). Printers are then responsible for printing the physical books. With digitisation, many of the traditional activities (such as printing, binding) are replaced by digital copies. Collective rights management societies manage copyrights or related rights on behalf of for their members (right-holders) (De Voldevere, Et’ al, 2017). There are no special rules for entry as a publisher in Uganda. All one needs is to incorporate as a commercial or non-commercial entity or even just self-publish. The delays to release royalties, dissatisfaction with payments, and rejection by publishers has led to the phenomenon of self-publishing in Uganda. The literature and publishing domain is constrained by limited capital and lack of government support. Local publishers struggle against well-funded foreign competitors, with slow bank responses and insufficient national policies.

- viii) **Culinary Arts:** The production stage of the culinary arts domain involves the transformation of culinary concepts and ideas into actual food products through various activities, including ingredient preparation, cooking techniques, and presentation. All these activities contribute to the overall quality and appeal of the food offerings. The selection and preparation of ingredients involves sourcing high-quality raw materials, which is crucial for ensuring the freshness and flavour of the dishes (Hu, et al, 2016). Whereas there is similarity in basic cooking ingredients in many different cultures, the food preparation processes and final food presentation differ. A variety of cooking techniques are applied, which determine the final taste, texture, and appearance of the food. Chefs are increasingly focusing on the visual aspects of their dishes, aligning with global trends that prioritize not only taste but also the overall dining experience (Putri & Harsanto, 2016). Therefore, culinary arts training plays a vital role in developing these skills, as it equips aspiring chefs with the necessary knowledge of cooking methods, flavour profiles, and presentation techniques (Hertzman & Ackerman, 2010).

2.4 Marketing/distribution

This stage of the creative industry value chain relates to activities, which help to make the created and produced work available and bringing generally mass-produced creative products to consumers and exhibitors. With digital distribution, some goods and services go directly from the creator to the consumer. The distributors of physical creative products are being challenged by new distribution models that give consumers access to digital creative works (e.g. streaming of music, online gaming, e-books). Digital distributors are no longer limited by “physical stock” and thus can offer enormous catalogues that would have large difficulties finding shelf space in physical stores.

- i) **Cultural and natural heritage:** Cultural and natural heritage experiences are delivered to consumers through various channels, including tourism operators, online platforms, or community-based initiatives. Most of the activities related to cultural and natural heritage occur at this stage.
- ii) **Visual art and crafts:** The marketing and distribution process normally takes market trends into account leading to development of market-friendly products. At this stage

packaging is essential, not only of the product but also of the producer and individual artist or country of origin. The appeal of crafts lies in their aesthetic qualities, functionality, ritual history, or souvenir value. Visual arts attract buyers through aesthetics, emotional impact, cultural origin, and conceptual understanding. In visual arts, intermediaries such as dealers, agents, and gallery owners play a vital role in selecting, packaging, and presenting artworks to broader audiences, thereby influencing their value. However, this process is fraught with challenges, as it relies on subjective judgments, market knowledge, and an understanding of the artwork's context and concept. Misjudgments in assessing the work or its marketability can negatively affect all stakeholders involved. For example, international exhibitions of art from different parts of Africa have misrepresented "African" art as a more or less homogenous category. This has often led to a misunderstanding of the history, context and practice of African art by international audience.

Unless products are sold by artists in their own artist's workshop, the market is managed by intermediaries such as galleries, art dealers, and art fairs. **Art Galleries (promotion or sales)** provide space for exhibiting art works and try to sell (through exhibitions, catalogues, participation to art fairs, etc.) the artwork to a private/public collector or an art dealer. However, most galleries deal with visual arts not crafts. The galleries and artists agree in advance how much of the sale proceeds each will get. **Art dealers** mainly focus on buying and selling works of art. They view and select the artworks they deem fit for the market in order to package and present the product to a wider audience than the artist could access. This process empowers the art dealers to pass judgement on, and thus add value to, or subtract value from, an artwork. They mainly rely on either the promotion galleries or the artists themselves. Some art dealers are self-employed and not registered as professional entities, which may entail tax losses as well as a lack of transparency regarding sales (and therefore a lack of revenues from subsequent resales). **Art fairs/festivals** are increasingly being organised in emerging markets. These bring together a lot of galleries, collectors, art dealers, etc. More people than those who normally attend galleries participate in the art fairs. The participants get to see what galleries from different parts of the world offer, compare prices and get an update on the latest trends. For early collectors, this helps to develop tastes and knowledge.

Artists in Uganda are taking on a range of roles to organize events and structures to promote their artworks. This approach has evolved out of a lack of professional curators and agents that can focus on emerging talent, or work that is rooted in public and social awareness concerns. Crafters and some artists have become street vendors in order to deliver their product directly to a market and to take the product to an audience, as opposed to attempting to lure an audience to a gallery or craft market.

Marketing efforts often lack professionalism and fail to meet the quality standards expected by international markets. Participation in trade fairs is inadequate. Crafts often appear generic and lack differentiation from those of other African countries. Moreover, Ugandan exhibitors are generally undertrained, limiting their ability to meet global market demands.

There is also limited commercialization of craft production activity. Many craft makers in rural locations far away from urban centres make handicrafts as a past-time

activity. It is treated as a not a specialized commercial activity for income generation. They engage in time conflicting activities, which render their supply volumes low, inconsistent and very sporadic.

In addition, there is limited public exhibitions/artists' spaces to provide some first public exposure to artworks in a non-profit environment, which is restrictive to the development of visual arts. Many of the gallery spaces are overcrowded making selection and differentiation difficult. Few Ugandans are interested in contemporary fine art, leaving galleries largely to the expatriate community. No effective marketing strategy is in place to professionally promote the visual arts and crafts products at an international level.

- iii) **Fashion design:** This stage involves identifying, defining and promoting the product (clothing and accessories) to a target market, as well as delivering the product to the different locations so that customers can buy them as per their convenience. Distribution channels within the fashion industry encompass brick-and-mortar retail, online retailers, fashion shows, and pop-up events. Designers have the option to sell their collections directly to consumers or through various retail channels such as e-commerce shopping platforms, boutiques and pop-up micro-sites, to mass-market collaboration with leading high-street chains.

Digitalization has expanded growth opportunities for Ugandan fashion designers tremendously. It has enabled those previously constrained by limited domestic markets to reach a much wider regional and international customer base without delocalising. Regardless of size or formality, a wide array of fashion enterprises are seizing new marketing and distribution possibilities offered by the internet and social media to reach domestic, regional, diaspora, and other international markets. Websites like www.satisfashionug.com and www.wayaclothing.com provide platforms for marketing and distribution of Ugandan fashion products. Informal garment producers, tailors, and retailers are actively mobilizing social media platforms such as WhatsApp, Instagram, and Facebook to reach customers, often making the most of mobile money payment systems for domestic and regional sales.

- iv) **Music distribution:** The record labels/companies and music publishers are generally in charge of packaging the music, both in a digital and physical format (i.e. copying the recordings onto CDs or pressing vinyls and having sleeves and cases made⁸) and distributing it to the various distribution channels. Record companies and music publishers also promote and create ways to get exposure for artists and the music (through radio or music blogs and magazines coverage, feature placement on different streaming platforms etc.). Globally, digital records are supplied to digital service providers (DSPs) such as iTunes, Spotify, Amazon, YouTube, Deezer Discovery, etc. Social media platforms, such as TikTok have become increasingly prominent tools for artists to share their music. The emergence of these platforms has further lowered the barrier to entry to the music streaming market for artists and has facilitated access to a much wider audience base. YouTube, the world's largest and most popular online video streaming service (with 1.3 billion unique users every month), has taken a special role in the distribution of music. The digitisation of distribution has eased the process for artists who are now able to release

⁸ This component of the value chain is clearly on the decline in a context of dwindling physical sales

their own music to any major streaming service. Many artists are active in marketing and distribution of their music. Whereas this has increased the amount of music made available to end-users, it has also led to significant reduction on artists' remuneration rates (UNESCO, 2022).

Music publishers are by and large non-existent in Uganda. The main method of distribution that artists could find profit in is radio and TV airplay. Songs airing on radio and the related videos airing on television are absolutely critical to the promotional engines of contemporary artists. The music streaming market is experiencing rapid growth in Uganda. Artists working with the international and diaspora markets in mind put their music up on iTunes, Amazon, and Spotify. Websites such as Hipipo.com and Howwe.biz offer music to the public for free, , though undoubtedly visited by Ugandan music enthusiasts all over the world. These channels bring in money directly to the artist, however, they are not the primary way that most listeners receive the content because the number of people who stream content or buy high-fidelity music online is still comparatively low.

The main revenue stream for the majority of musicians in Uganda is live performance. Many artists rely more on the revenues they make through their live performances. sing a few of their popular songs over the original tracks on CD, at corporate parties, weddings and concerts. Very few music artists make worthwhile incomes from sales of their music on physical media. The lack of any distribution structure means that there is little to no incentive for capital investment in artist development or music sales (Lubogo, 2022).

Whereas the live music business is centred on the artists, hundreds of people are employed including; the artist managers, agents and promoters, as well as venue operators and several suppliers and contractors. Whereas the concerts can make money for an artist, more often than not they serve more to position the artist as being in the upper echelon of musicians that can mount a large show rather than the shows themselves being a lucrative proposition for the musician (Klingenberg, 2019). However, the share of revenues from live performances is much more beneficial for artists compared to other revenue streams, with 80% of revenues going to artists in some live venues (De Voldevere, Et' al, 2017). Without adequate sponsorship prior to a live performance, it can be extremely costly to the artist. The **music promoters** (events promoting companies) are responsible for negotiating and organizing live performances with agents, broadcasters and venue owners. Depending on the artists' popularity, the music promoters often invest significant amounts of money in the promotion of concerts in Uganda.

The live performances in Uganda are largely under-regulated in terms of contractual arrangements and the protection of intellectual property. Sometimes artists fail to honour their contracts. On the other hand, promoters do not secure formal agreements from artists or miscalculate the costs of production of live events, which leads to conflicts.

Due to piracy and the fact that most people prefer to acquire music for free, revenues do not seem proportionate to the volume and usage of music on offer. For instance,

the bulk (50%) of the money made on CRBT goes to the Government, telecom companies (35%) and collecting bodies (13.2%), leaving only 1.8% for the artists⁹.

- v) **Film distribution** concerns the packaging and broadcasting of the film to viewers using various delivery technologies. Distribution companies employ various options, including attending film and television festivals, use of sales agents, cable and television networks, and online distribution channels to not only promote but also sell the film to cinemas. The digital shift has changed the film distribution set up. **Cinemas** were probably the most important distribution platform for new films followed by the **DVD sales and TV broadcasters**. DVD/VHS sales and rentals or the home video platform were a high margin business for the film industry, However, it is gradually disappearing due to a strong impact of piracy as well as an increasing switch to digital streaming models (De Voldevere, Et' al, 2017). There are mainly 4 ways for films to be screened publicly in Uganda: television, the cinemas/theatres, video halls (Ebibanda), and film festivals.

Subscribed digital service digital service providers such as Netflix, Amazon, Showmax, etc. are remedying the challenge in distribution through their subscribed Video-on-demand (SVOD) platforms. Showmax (MultiChoice), iROKOTV, and Netflix are the major international digital platforms operating in Uganda. Mobile operators have their own mobile video stores, such as the Kibanda Xpress on MTN Uganda's mobile app YOTV and Airtel Uganda's Airtel TV. Some TV Broadcasters create attractive Video-on-Demand (VOD) offers to compete with the over the top (OTT)¹⁰ content by digital video service providers. For instance, as part of its package, DSTV provides an option to access content from the Showmax VOD platform.

Film award ceremonies and festivals are alternative distribution and exhibition platforms for independent films across the world. The African film festival circuit is increasingly growing in size and influence with several notable cinema showcases¹¹ already established as alternative distribution and exhibition platforms for independent African films across the continent (Kamukama, 2017). The blackout within the mainstream cinema system has particularly led to the thriving of **local film festivals**. Today, Uganda is home to over 15 film festivals including the *Amakula Kampala International Film Festival* (which was inaugurated in 2004), Pearl International Film Festival (PIFF), Nile's Diaspora International Film Festival (NDIFF), Many International Film Festival (MIFF), Queer Kampala International Film Festival (QKIFF), Bayimba International Film Festival of the Arts and the Uganda Film Festival (UFF),. The Uganda Film Festival (UFF), which is organised by Uganda Communications Commission (UCC), was inaugurated in 2013 and it is solely funded by government. The UFF is open to only Ugandan films, although its 2014 edition attracted films from across the East African region. The festival features

9 "Each CRBT costs Ush700 (\$0.18), of which the government takes 50%. This translates into Ush350," "The telcoms walk away with 35% or Ush245, and the aggregator/publisher pockets 13.2% or Ush92.4. This leaves the musician with a paltry 1.8% or Ush12.6 before tax." – Batambuze, Vice chairperson told to the Daily Monitor (Aug 2022).

10 Over-the-top content (OTT) refers to delivery of audio, video, and other media over the Internet without the involvement of a [network] operator in the control or distribution of the content."

11 Burkina Faso's Fespaco, Carthage in Tunisia and South Africa's Durban International Film Festival (DIFF), etc.

over 120 screenings across five cinemas in Kampala, drawing over 5,000 spectators every year. It features training programs, forums and hefty cash rewards for the most outstanding films (Kamukama, 2017).. Filmmakers have expressed concern about the festival's inability to allocate them time to introduce their films and interact with the audience due to the huge number of films screened within just three days of the festival.

The television industry (pay TV and free-to-air) is one of the major distributors and exhibitors of Ugandan films. The TV sets penetration in Uganda stood at 36 percent of households in 2019. Today Uganda has 30 TV stations, including one public TV channel, the state-run Uganda Broadcasting Corporation (UBC), and eight pay TV service providers. With the number of pay TV subscribers at 1.55 million in 2020, the free-to-air channels were the most watched (UNESCO, 2021). It is also known for its collaboration with broadcasters, particularly Pay TV. All the four Pay TV broadcasters; DStv, Go TV, Zuku TV and Star Times, are regular partners of UFF. Besides sponsoring award categories, they often buy the best films at the festival for distribution on their various channels¹² (Kamukama, 2017).

A successful cinema release is instrumental in generating revenues later on in the film distribution cycle because it adds value to a film due to the publicity generated for cinema release. According to the Uganda Media Council, Uganda has only 10 functional standard cinemas spread across Kampala, Entebbe, and Mbarara, predominantly, showing the latest movies produced in Hollywood and India's Bollywood film industry. The UFF has a partnership with all the major cinemas in Uganda and as such offers audiences the rare opportunity of watching a local film in a standard cinema. In addition to the five cinemas in Kampala, the festival also holds free public screenings across Kampala city, further ensuring that the best of Ugandan cinema reaches the people. **Video halls** (Bibandas), function as local cinemas and general audio-visual entertainment venues for grassroots communities in Uganda. However, they mainly show Hollywood and Nollywood movies because local movies are not only hard to get but the producers and distributors are concerned about copyright issues (Rasmussen, 2010).

Distribution of local films is constrained by the slow adoption of local content policies. Although a 2013 government directive mandates that local TV stations air 70% local content, its adoption has been slow, with local drama comprising only a small fraction (2%) of total programming in the three-month period ending in March 2023. This is attributed to the high costs of local content production. The cost of airing local series ranging from Shs20 to Shs25 million while foreign series can be secured for as little as UGX3 million (Caribou Digital, 2023).

In addition, the film distribution system in Uganda is underdeveloped. With limited access to cinemas and only a few local TV channels dedicated to local content, many filmmakers struggle to get their films watched by a wider audience.

12 Felista Fable, House Arrest and Freedom, the Best Feature Film award-winning films at UFF 2014, 2015 and 2016, respectively, have for instance all secured deals with DStv. Other Ugandan films such as Reform, State Research Bureau (S.R.B), The Clan's Wife and The Tailor have also been picked up by various cables following their participation at UFF.

- a. Uganda's television household penetration rate stands at only 34 percent (BBC Media Action, 2019);
 - b. The limited exposure for their work results in low earnings, which is in many cases below the cost of making a film. Even the few available distribution channels (the Uganda Airline, cinemas, video halls, VOD streaming platforms, etc.) are not being utilized fully by filmmakers either because of ignorance or inability to support (market and promote) their movies to use those channels.
 - c. The once-thriving DVD market has collapsed with the rise of online platforms in recent years with the advent of online platforms (UNESCO, 2021). Whereas the Video-on-Demand (VOD) streaming market is rapidly developing in Uganda, the market is not yet mature enough to be profitable for the local filmmakers.
 - d. **Piracy is still a challenge to Uganda's film industry.** Users often resort to illegal methods to access copyrighted material. Whereas the country has laws in place meant to promote IPRs and protect the creative sector, there is limited public awareness on IPRs across the country. This is partially attributed to limited finances to facilitate knowledge dissemination on IPR to the people.
 - e. Entry barriers at the film distribution stage are relatively high because profits on films are far from guaranteed yet distributors recoup their investment along the different consumption platforms.
 - f. The UFF is an independent national film festival that does not belong to any international network (festival circuit) thus limiting the participating films to the confines of Uganda and probably the region. It has also positioned itself as a competitor to the other local festivals.
- vi) **Radio and TV distribution and transmission:** This stage involves the marketing and delivering of broadcasting services and content to the audience using various channels. It involves the management of the infrastructure required to support the transmission of radio and television signals. Television and radio content reaches the audience mainly via television and radio sets respectively. However, the introduction of digital technology has not only made the media more interactive but also enhanced the quality of radio and TV broadcasts and allowed for the development of online radio and TV stations. In the case of TV, these are usually in the form of TV live streams. In the case of radio, these are often live streams or podcasts that can be streamed or downloaded. Many traditional radio stations now stream their content online, reaching a wider audience. Uganda completed its digital migration in June 2015, in line with international agreements. The transition from analogue to digital broadcasting led to a shift in the production, dissemination and exhibition/reception of broadcasting content, and the basic structure of the industry changed.

The transition from analog to digital broadcasting disrupted traditional distribution models. Streaming services, digital content platforms, and social media have altered how audiences consume media. Broadcasters compete with a myriad of digital options and find ways to retain viewership and advertising revenue. Digital transformation has, however, created challenges related to content overload, accuracy and responsibility. The sheer volume of content available in the digital age can be overwhelming for audiences.

Streaming high-definition content requires significant internet bandwidth. This has led to discussions about internet infrastructure and net neutrality. Whereas digital distribution has increased the amount of music made available to end-users, it has led to significant reduction on artists' remuneration rates.

Regulations governing broadcasting are struggling to keep pace with technological advancements. Issues related to internet neutrality, copyright, and privacy require continuous legal and regulatory updates. Some users still resort to illegal methods to access copyrighted material for free. Navigating this complex regulatory landscape is challenging for broadcaster. The traditional broadcasters (including radio and TV stations) are also affected by lower advertising revenues, which has affected performance rights income for authors, artists as well as record companies.;

- vii) **Performing arts:** Distribution/marketing of performing arts refers to the means by which public interest in specific performances is created through publicity and promotion. The process involves a vast number of people, from arts and culture journalists to ticket sales agents. This stage involves ensuring that the performances generate revenue to the artists and achieve the desired impact. It involves securing performance spaces such as theatres, concert halls, festivals, and unconventional venues (e.g., parks, community centers), planning and organizing tours to reach different geographic locations, and calendaring through coordinating performance dates to maximize audience reach and avoid conflicts with other events. This involves a vast number of people, from arts and culture journalists to ticket sales agents.

The **producer or sales agents** are responsible for promoting the performance, though it may be outsourced to a promoter owing to their specialty, such as in a specific genre or geographic location. Agents are in charge of selecting venues for performances, setting prices and selling of tickets, creating tour schedules, and coordinating performance tours in order to maximize returns to artists and performers. Distribution also involves the use of various media channels (print, online, radio, TV, social media) to reach and engage with potential audiences informing them about the product, people involved and description of the play to encourage them to attend the performances.

Many performing arts groups and organizations in Uganda, have limited funds for marketing especially on televisions and radios, which has affected their ability to reach wider audiences. A majority of the performing groups/individuals do their own marketing with posters, banners, flyers and word-of-mouth, and use local design and print shops on an ad hoc basis. Despite the increase in digitization in Uganda, physical ticket sales are still predominant, with tickets most often sold at the door before the performance because theatres or venues are not big enough to hire the services of booking agents. Additionally, the digital divide between the rural and urban areas has made it impossible for the agents/procedures to use digital marketing tools in rural areas.

Performing arts infrastructure is centralized and inadequate, with only a few professional-grade theatres located in the central region. In addition, the theaters are unaffordable, making access and rehearsals difficult and costly for artists.

- viii) **Literature and publishing:** Distribution and trading of books, which is the final stage of the book publishing value chain, involves planning, implementing and controlling the

flows of the published product from the points of origin to the points of use to meet customer needs at a profit. It involves; marketing and promotions, processing and servicing of orders, and bringing books to physical or online stores (packaging and transport). It may be performed by the **publisher** or by a **distributor** (Libraries usually do not buy books directly from publishers, but use large distributors as intermediaries). Notably, book distributors can return books to the publisher if they are not sold. Finally, the product reaches the customer. Physical books can be bought in physical bookshops or on online platforms selling books. E-books are sold on online e-book platforms. There are over 250 bookshops in Uganda spread across the country. However, a non-conventional channel of selling or distributing books - pavement booksellers and hawkers are commonly used to sell both old and new books.

There are only a few outlets for books in Uganda. The biggest market for Ugandan Literature (especially non-fiction) is schools especially for those books that are on the syllabus and the thematic curriculum. If a literature piece is on the syllabus or on thematic curriculum, it is more likely to be consumed. Books are sometimes sold at book fairs and directly in schools. The lack of enabling Government Policies on books, reading, writing and the use of the library is a major contributor to the poor reading/writing culture. There are simply too few good, well-stocked, professional and credit worthy booksellers to support a decentralized system of procurement and distribution.

- ix) **Culinary Arts:** Digital transformation has enabled culinary businesses to reach and engage with their target audiences effectively through digital marketing strategies. Platforms like Instagram and TikTok have become vital for sharing food experiences, influencing consumer perceptions and behaviors (Szakály, 2022). Influencers play a significant role in shaping dining choices, as their endorsements can drive interest in specific culinary offerings and destinations.
- x) The culinary industry is a highly competitive environment, with restaurants constantly coming to the market with new culinary creations. A creative person should understand market demand and consider cost control in order to plan a new creation (Lin & Baum, 2016). Culinary tourism has emerged as a significant market segment, where travellers seek authentic culinary experiences that reflect local culture. Culture affects the food outlook when it is presented for consumption. The culinary artists must therefore, incorporate strategies that highlight the uniqueness of local cuisines and the stories behind them to enhance their appeal to both local and international audiences.

2.5 Consumption

This stage of the creative industry value chain concerns the activities of audiences and participants in consuming creative products and taking part in creative activities and experiences (e.g., book reading, dancing, participating in carnivals, listening to radio, visiting galleries). The quality and commercial success of the different creative products or services is determined by a number of factors in the successive stages of the chain, including: the production process; the competence of the key actors; and the consumer demand at home and abroad.

New consumption patterns are having an impact on creative expressions. Consumers are increasingly unwilling to pay for the consumption of culture in the digital age. They look for

ease of access to and consumption of cultural works at low to no cost, which has a negative effect on revenue for the artists. Free access still appears to be a dominant driver in consumer behaviour with respect to digital creative content, despite a growing use of subscription based online services such as Spotify in music or Netflix in audio-visual (De Voldevere, Et' al, 2017).

A majority of consumption of creative products still remains non-digital (e.g., attending a live performance, visiting and enjoying a piece of visual art at a gallery). Therefore, traditional actors, are still essential in delivering those types of creative works for consumption. Having a strong network of contacts and insights in local markets and tastes, is critical to spot talent and develop a service that fits the market, etc., which digital platforms are unable to do.

The increasing internet penetration will increase the consumption of creative goods on digital formats instead of physical products. Higher internet speed will increase the capacity for download and streaming. The improvement of cloud computing will allow for a higher digital storage capacity of video, film, music, pictures in computers and portable devices (De Voldevere, Et' al, 2017). This trend can facilitate creators to reach new markets and audiences. The consumption pattern is shifting from the fixed screens of home entertainment toward mobiles. Portable devices will be the principal way to access to cultural content, making the content available anytime, anywhere, at any devices.

Visual arts and crafts: The consumer is the end user of the artworks and the one that has the power to affect the production with his/her behaviour. The visual art and craft market places can be divided into two main categories: i) **the mass market**, where artworks are bought without much regard for authorship and are valued by price and utility. The local Ugandan buying market is very noticeable in this category, especially in crafts trade; ii) **the niche market**, where consumers have knowledge of the artworks and are willing to spend more on the basis of this knowledge. The niche market is not only represented by artist's workshops, but also by luxury shops, which sell certain artisanal products such as jewellery and designs. In Uganda, the niche market comprises the diplomatic community, tourists and a handful of corporate organizations. However, consumption of visual arts and crafts in Uganda suffers from:

- a) Limited audience engagement, which has resulted in very limited reception and feedback. There is a general perception that visual arts are elitist, or at least highly specialized, effectively excluding the majority of the population;
 - b) Lack of preservation and archiving of the beautiful embroidery of art and design in Uganda for the future. Given their fragile nature, most visual artworks deteriorate over time due to lack of proper care, hence the risk of losing the culture and history behind the art (Nkanze, 2023); and
 - c) Stiff competition from cheap imported art products from countries like China, including curtains, carpets, office desks, and wall hangings. These products are commonly found in public spaces, hotels, and even government offices, which could otherwise showcase Uganda's unique cultural heritage.
- i) **Fashion:** Most people in the world today wear what can be described as “world fashion,” a simplified and very low-cost version of Western clothing, often a T-shirt with pants or

a skirt, manufactured on a mass scale. There are also numerous smaller and specialized fashion industries in various parts of the world that cater to specific national, regional, ethnic, or religious markets. There is wide spread adoption of the hijab (religiously appropriate attire) among Muslim women not only in the Middle East but throughout the Islamic world (Major & Steele, 2024). There are two types of clothing in Uganda. One type is more functional and is worn every day and the other type is more formal and/or unique to a certain culture. The latter is worn on special occasions and occasions that require the expression of culture.

There is dominance of imported second-hand and ready to wear clothing. About 80% of Uganda's population wears second-hand clothes (SHC). The import of SHC became an EAC wide issue in 2016 when the EAC took the decision to ban these imports in an effort to stimulate domestic fashion industry. The decision was however, later reversed because the SHC business is employment-intensive, with potential to generate a continuous supply of relatively secure and well-paid jobs throughout the value chain. In Uganda, the SHC generated USD78,870,300 in government tax revenues in 2021. It is estimated that on average, every ton of SHC imported creates around 7.58 jobs. Second-hand clothes (SHC) offer unfair competition because Ugandan designers cannot compete with the low prices offered for the second-hand clothes and also kill creativity in the local clothing and fashion industry.

The local fashion industry is hindered by public service standards that restrict office attire to Western-style suits, largely excluding African wear. A similar trend exists in Parliament, where members may be ruled out of order for wearing African attire. Such regulations undermine the growth of Uganda's fashion sector and its promotion of cultural identity.

- ii) **Music Consumption:** Music is an unavoidable constant in people's daily live and remains a global unifying mechanism. To maximize any chance of success in the music business, aspiring artists must gain an understanding of how music is consumed and how that is changing alongside technology. With the emergence of new technology, consumer behaviour is moving towards instant, real-time, anytime-anywhere access to music facilitated by the integration of services across different platforms and cloud storage (De Voldevere, Et' al, 2017).

Platforms including smartphones and tablets enable instant sharing of music and also payment and subscription. Consumption in the form of attendances at live performances of all kinds (concerts, musicals and opera, clubs, festivals, and so on) can be measured by ticket sales. In the case of published music and of recorded music, consumption is determined by sales revenue and license fees. Research conducted by the International Federation of Phonographic Industry (IFPI) across 22 of the world's leading music markets highlights people's continued appetite and passion for music, shining a light on the pivotal role it plays in so many different areas of their lives. Paid audio streaming services were the most preferred medium for music consumption in 2022, accounting for 24%. However, the enduring popularity of radio continues (at 17%), with 73% of the people interviewed indicated that they tune in to listen to the radio mainly for the music. Radio listenership figures show that radio is the most popular medium in

Uganda with music representing the 3rd largest share of radio stations' weekly programming (Levin, 2020). However, people around the world continue to buy physical music, with 10% having purchased vinyl (which are known as records, LPs (Long Playing), EPs (Extended Play), CDs and/or digital albums.

- iii) **Film consumption:** This stage concerns the process by which consumers actually experience the film. Film consumption has changed dramatically over the past 30 years. Opportunities for movie viewing outside cinemas have expanded significantly in domestic and mobile spheres spurred on by advances in digital technologies and improvements in Internet speed and connectivity. This has made it possible for films to be watched in more places than ever before from traditional film cinemas to the temporary sites of film festivals and video halls, domestic spaces such as living rooms and bedrooms, in transit in planes, trains, buses and cars and many more situations in between (Aveyard, 2016). The new consumption trends (including piracy) are affecting physical film sales, but the industry has been able to control the various consumption windows to maximise revenues.

Developed film industries like Hollywood (USA), Bollywood (India), Nollywood (Nigeria), etc, produce films primarily for consumption at the cinema. Ugandan films, however don't attract significant crowds at the cinema mainly because the cinemas charge what is considered a fortune to ordinarily Ugandans. The few local productions that have premiered at the cinema are usually backed by corporate sponsors. Most Ugandans watch local films on television. Films that have not made their way to being broadcast on television are barely known by the audience. There are hundreds of fully produced films and series that have not reached even 5% of our country's population (Dinah, 2022). Customers always demand better local programming and, to meet that demand, they continue to commission more content, more films, more series and more sports coverage. Consequently, Multichoice Uganda launched Pearl Magic - a channel on DSTV dedicated to solely Ugandan content, in October 2018. However, pay TV services accounted for only 2.2 million households as of June 2022, meaning that free-to-air broadcasting was the primary access method (UCC, 2023).

The growth in internet usage may to some extent account for the stagnation in traditional film consumption patterns as consumer behaviour gradually changes to data led consumption patterns as evidenced by growth in VOD streaming services (UCC, 2023). In 2022, URA finalized plans to enforce VAT on digital services provided by non-resident persons, making Uganda the fourth country in Africa¹³ to do so. The URA made contacts with leading non-resident digital service providers like Google, Netflix, Meta and Spotify in preparation for enforcement of this new tax obligation. Affected services may include online advertising, online music and video streaming, supply of software, access to databases, films and games of chance/betting.

The global nature of the internet and the ability of users to easily copy and share audio-visual content pose challenges to copyright enforcement, and specifically undermine the rewards for creative talent and rights holders.

¹³ The first movers include South Africa, Nigeria and Kenya.

- iv) **Radio and TV broadcasting:** TV viewers and radio listeners increasingly consume content on-demand and expect personalized experiences. The digital age has led to highly fragmented audiences. Viewers have numerous choices, and their preferences vary widely. This makes it challenging for broadcasters to capture and retain a substantial portion of the market share, as they must cater for diverse tastes and demographics. Broadcasters are required to adapt their programming and distribution strategies to accommodate these changing habits.

TV and Radio broadcasting industry is highly competitive with numerous players vying for subscribers. This has led to content fragmentation, where exclusive content is available on different platforms, requiring users to subscribe to multiple services. In addition, viewers and listeners are increasingly consuming content on-demand requiring broadcasters to adopt their programming and distribution strategies to accommodate these changing habits and preferences

- v) **Performing arts:** The consumption segment of the performing arts value chain denotes how audiences engage with and experience performing arts. The consumption patterns of performances are usually influenced by cultural preferences, technological advancements and socio-economic conditions. Whereas traditional theater remains significant particularly in urban centers, its consumption is usually lower than that of music and films. There is increased public interest in drama for laughs instead of seriously analytical drama, as well as preference for other forms of entertainment like recorded music and films. This explains the decline in theatre audience attendance in Uganda. Indeed, working class audiences continue to attend comedy in big numbers to laugh and refresh after tiring work schedules of the day. The variations are due to the differences in age groups, gender and social-economic conditions. There is an evident disconnect of the old and young generations, and how performing arts are appreciated. Theater drama mainly attracts individuals of age group 30 years and above while stand-up comedy attracts the audience of mainly young people below of 30 years and below. Live music performances especially in urban areas are attended by wealthy to middle class people.

The declining quality of the plays and unclear messages in the performances has affected the consumption of theater dramas and comedy. Plays used to be referred to as the mirror of the society, however, the quality of the plays produced of late is lacking as majority of the stakeholders along the value chain lack adequate skills and training. Furthermore, unlike in the earlier years where the plays had educational and societal analytical messages, majority of the current plays are not delivering any important message which has led to many people to loss interest. The serious consumers who go to theatres to look for ideas that would build their children, families and society in general are unable to gain such as these values are no longer considered in most theaters. There are issues with the packaging of the messages by some of the stand-up comedians and many would be consumers consider them vulgar.

- vi) **Literature and publishing:** Consumption of books by the general public is low except for political, inspirational works. Books are competing with other creative domains such as film, television and multi-media and young people prefer the latter. The works that are most popular are those with plots from daily happenings in communities. Most literary works consumed in Uganda are foreign.

- vii) **Culinary Arts:** Acceptance of culinary creations by consumers depends on various factors, including consumer behaviour, preferences, and the overall dining experience. The demand for organic, locally sourced, and environmentally friendly products is on the rise, reflecting a broader trend towards healthier eating and sustainable practices (Királ'ová & Malec, 2021). Culinary tourism has emerged as a significant segment within the broader tourism industry, where travellers seek unique food experiences as part of their journeys. This includes exploring local cuisines, participating in cooking classes, and visiting food markets (Garcia-Sanchez et al., 2024). The consumption of local food not only enhances the travel experience but also fosters a deeper connection with the culture and community of the destination (Királ'ová & Malec, 2021).

Culinary artists (the chefs) and restaurant owners invest time and resources to understand consumer expectations and adapting to changing tastes to remain relevant in a competitive culinary landscape. The test of the majority of customers in an area is a very important element to a culinary artist's creativity. Most often, chefs develop culinary creations depending on the location, to source and age of customers. In an area where many people eat spicy food, a culinary product with mild flavour may not be accepted. On the other hand, if the current trend is for healthy cooking and the creation is heavy in flavour, its success will be limited.

2.6 Conclusion

Until the moment of consumption, the market success of an artwork is highly uncertain, as consumers can only determine the quality of creative works upon consumption. The high level of uncertainty about the (economic) success of an artwork, raises the question of who will take the risk to invest in the creation and/or production of such work.

The costs of creation and/or production can be (very) high for many creative works, significant (upfront) investments is required for a theatre play, a film or television programme before there is any creative work. The investments relate to human resources, coordination, and specialized equipment. Making a theatre play requires huge investments in human capital, while making a television production requires (also) large investments in specialised equipment. Those investments are sunk costs, largely made before any audience has consumed the work. Consequently, strict project coordination management is required in the value chain to ensure commercialisation and dissemination of creative works. The role of a coordinator is therefore critical in these types of value chains.

For some creative domains, there are more opportunities for exploitation (and thus revenue generation) via different channels – offline and online, than in others. For Films are first released in cinema, later on DVD, then on pay TV and finally broadcasted on free-to-TV. Each “window of exploitation” generates new revenue streams. Safeguarding these different windows of exploitation is very important in the business model of the film sector, to ensure that the high upfront investment costs can be maximally recovered.

In terms of economies of scale, there are three different types of creative works:

- i) Those that can be reproduced at low marginal cost without diminishing the creative value of the work e.g., music, books, films, video games, TV series/formats.

- ii) Those that cannot be reproduced at low marginal costs, although reproduction would not diminish the value of the work e.g., theatre plays or concerts.
- iii) Those for which the value of the work is derived from its originality and uniqueness as product. Even though reproduction might be possible at relatively low marginal costs, such reproduction would negatively affect the value of the original work. This phenomenon can be found in the visual arts and to some extent in some radio and television productions (talk shows, news magazines, etc.).

With respect to consumers' experience, there is a distinctive difference across the different creative domains analysed. For instance, there is not much difference listening to recorded music on CD and listening to it on a flash disc (in mp3 format). However, admiring a digital version of a piece of visual arts is hardly a substitute for experiencing the original.

Unlike other arts, culinary creativity has a very short shelf life. If a culinary creation is not accepted by the market within that period of time, then this can't be called creativity. A painter's creation may not be accepted by people when he is alive. However, people can still evaluate this painter's artwork after he/she is dead.

There is a strong inter-dependence between all the creative domains. The visual arts domain not only adds value, to certain creative products, but can also act as a catalyst for bringing different creative industries together. The performing arts domain is very essential to several other value chains, such as, music, audio-visual sector (film and broadcasting), and tourism. Performances in public/private spaces (e.g. parks, restaurants) and renowned venues and performing arts destinations such as the Ndere Center, are a key factor of Uganda's touristic attractiveness. Radio and TV broadcasters are important for the exploitation of content produced by the music and film sectors. Very famous audio-visual works rely on books (e.g. the Lord of the Ring films, the Game of Thrones series). While the initial notoriety of the book can help the audio-visual works achieve success, conversely the success of audio-visual can boost the interest for books on which they are based. According to industry' estimates, 20 to 35% of box office hits are adaptations from a book.

3.0 Support Functions for the Creative Industry

3.1 Introduction

Support functions refer to the cross-cutting functions that are not part of the creative industry value chain, but play a key role in the different stages of the value chain:

3.2 Policy and regulation

This function relates to activities carried out by institutions (public or private) whose mission is to offer the means and a favourable environment for creative activities, operators and spaces. Policy and regulation are necessary to promote creation, production, distribution and access with regard to the diverse creative goods and services. The intellectual property regulatory bodies should be able to monitor and protect intellectual property, such as copyright and patents. The regulatory framework for Uganda's creative industry includes international, regional, and national instruments aimed to promote and safeguard cultural and creative rights.

3.2.1 Legal and policy frameworks

The Government of Uganda has ratified several international conventions, including 1972 UNESCO Convention on Tangible Cultural Heritage, the 2003 Convention on the Safeguarding of the Intangible Cultural Heritage and the 2005 UNESCO Convention on the Promotion and Protection of Cultural Diversity and Expressions. Five of Uganda's cultural elements have been inscribed in the 2003 Convention. However, some international legal instruments, like the 2005 Convention on Cultural Diversity, are yet to be operationalized and this has hindered effective compliance with the legislations on the international scene.

Uganda is committed to the African Union Agenda 2063, which advocates for the advancement of African cultural heritage, arts, and creative industries as catalysts for socioeconomic progress and identity. Member states are urged to allocate resources towards cultural infrastructure, provide assistance to artists, and leverage the opportunities presented by the creative economy. Uganda has also ratified the African Charter for Cultural Renaissance, which emphasizes the importance of preserving and promoting African cultural heritage and creativity. Member states are encouraged to protect and promote cultural diversity, foster artistic expression, and enhance cultural cooperation.

The East African Community Creative Arts Cultural Industry Act (2015) was enacted to regulate the establishment and management of creative industries in community. The Act provides for the establishment of a Creative and Cultural Industries Development Council to offer a conducive environment to the improvement and stimulation of creativity and innovative endeavors among the citizens of the Community. The Council is expected to provide high quality training for skills and creativity development, as well as formulate policies, strategies and innovations to guarantee long term supply of talents within the EAC region. Uganda participates in regional and continental cultural exchange programs and initiatives such artistic collaborations, festivals, and cultural exchange events that promote cross-border cooperation, artistic diversity, and cultural dialogue.

The 1995 Constitution of the Republic of Uganda provides the basis for protection and preservation of the creative and cultural arts industry in the country. The Constitution recognizes the importance of preserving and promoting Uganda's cultural heritage and diversity. Article 37(2), mandates the State to take affirmative action in ensuring that traditional leaders and cultural institutions are protected and preserved. The constitution provides for freedom of expression, assembly, and association under Articles 29 and 38. The freedom of expression provides individuals in the creative and cultural arts industry with the freedom to express themselves artistically, form associations, and collaborate with others in pursuit of their artistic endeavors. Objective XXIV (b) guides the development, preservation and enrichment of all Ugandan languages. The use of any other language as a medium of instruction should be promoted in schools (Constitution (Amendment) Act 2005, Article 6).

Additionally, several laws were enacted to strengthen the culture function, including; (i) the Uganda National Commission for UNESCO Act, Cap. 28, which sets up the Uganda National Commission for UNESCO that acts as a link between Uganda and UNESCO and its

agencies, (ii) the Historical Monuments (Amendment) Decree (No.6) of 1977, (iii) the Historical Monuments Act of 1967, (iv) **the Uganda National Culture Centre Act (UNCC), 1959** (amended in 1965), which provides for the establishment of the Uganda National Cultural Centre (UNCC) - a body charged with providing and establishing theatres and cultural centers in the country; (v) the Copyright Act of 1964 (this Act has been repealed and replaced with the Copyright and Neighbouring Rights Act, 2006), which provides for protection of literary, scientific and artistic intellectual works, computer programs, electronic data banks and their neighbouring rights; (vi) **the Stage Plays and Public Entertainment Act of 1964 (Cap 49)**, which was put in place to regulate and control stage plays and public entertainments in the country were enacted to strengthen the culture function; (vii) **the Public Order Management Act (2013)**, which provides for the regulation of public meetings, duties and responsibilities of the police, organizers and participants in relation to public meetings, prescribes measures for safeguarding public order, and related matters; (viii) **the Uganda Communications Act, 2013**, which established the Uganda Communications Commission (UCC) to regulate the communications sector, including; telecommunications, radio and TV broad casting, postal communications, data communication and infrastructure; and (xix) **the Press and Journalists Act (Cap. 105)** provided for the establishment of the Media Council as the custodian of professional standards in the media. .

Several policies are in place to preserve and promote Uganda's culture and creative arts including; (i) **The Uganda National Culture Policy (2006)** provides a comprehensive framework for the preservation, promotion, and development of Uganda's rich cultural heritage. It aims to protect Uganda's diverse cultural expressions, promote social cohesion, and foster economic development. It also emphasizes the integration of culture into sectors like education, tourism, and governance, involving government agencies, civil society, and local communities. (ii) **The Museums and Monuments Policy 2015** regulates the preservation and promotion of Uganda's tangible heritage. (iii) **the Tourism Policy (2003)** promotes cultural tourism which is based on Uganda's diverse cultural identities. (iv) **The Broadcasting Policy** proposed to regulate ownership and content in the interests of diversity. However, for unclear reasons, this policy has never been made a public document since it was discussed by cabinet more than five years ago (Chibita, 2010) and (v), **a National Textile Policy, 2009** envisions “a strong and vibrant textile and clothing industry with sustainable capacity utilization and enhanced investment throughout the textile value chain”. The policy provides for strengthening of the **Textile Development Agency (TEXDA)**, a textile training agency under the Ministry of Trade, Industry and Cooperatives to support the sub sector in the areas of training in various textile and garments programs such as surface design, basic dyeing and printing; handloom weaving; business management; branding, merchandizing and others.

Whereas the policy and legal framework is elaborate, they have issues related to policy fragmentation and relevance to today's dynamic and digital environment, implementation and enforcement. The fragmentation policy and legal framework has affected the development of the creative industry. For instance, the Uganda National Culture Centre Act (1959) provides for the establishment of the Uganda National Cultural Centre Trust to enable provision and establishment theatres and cultural centres across the country to

promote access, expression, and enjoyment of culture. However, only the National theatre based in Kampala city exists to date. The UNCC Act, 1959 doesn't accommodate the diverse and evolving nature of creative industries. The Act limits the mandate of the UNCC Board to just a **Trustee** - administering, controlling and managing the property of Uganda National Theatre and Cultural Centre on behalf of the artists. Whereas the act provides for district art committees to be appointed by the Minister, these committees have never been appointed.

The Historical Monuments Act, 1967 has not been updated to provide for world recognition status of certain national cultural sites¹⁴. Additionally, it does not provide for the participation of communities in identifying and proposing for protection, of cultural resources that are important to them.

The Public Order Management Act (2013) complicates public performances, limiting artistic freedom. Section 5(1) of the Act requires that an organiser of any public gathering gives notice to the Inspector General of Police (IGP) at least three days before the date scheduled for the gathering. Organising a gathering without the required notice is an offence that carries a penalty of imprisonment for two years. This law poses challenges to individuals who engage in performing arts and need to organise shows and concerts. Section 8 gives powers to an officer above the rank of inspector to stop any gathering.

The Stage Plays and Public Entertainment Act (Cap 49) and its attendant Rules, 2019 (S.I. No. 80 of 2019) clamps down on artistic expression. The regulations require artists to apply for a permit and submit any work to the Uganda Communications Commission (UCC) before production. This rule has been publicly condemned as a way for the government to monitor and censor arts and cultural content. The rules require artists to submit a script of their play before performances and prohibit advertising their plays without prior permission. This, according to the artists interviewed, limits the types of performance accessible to artists and the public. For example, improvisation, which by definition, involves expressions without a script, would be impossible to perform under this rule.

The Uganda Communications (Film, Documentaries and Commercial Still Photography) Regulations of 2019, which enforce the Uganda Communications Act, 2013, places a huge barrier to entry for film producers. The requirement for proof of one's financial capacity or bank bond (under Reg. 10) is unnecessary. One is required to describe all the scenes of the film or documentary, attach a budget indicating how much is to be paid to the different creative individuals and proof of his/her financial capacity as well as a bank guarantee or bond before a license is granted to a filmmaker under Reg 2&6. Another licence is required to broadcast the same on TV, internet or any other channel (Reg. 2). A permit is required to have a film or audio-visual content shown in a cinematograph theatre (Reg. 16).

Effective enforcement of intellectual property rights under the Copyright and Neighboring Rights Act (2006) and Regulations of 2010 is faced by several challenges, including:

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- i) The Act does not take into account the management of digital rights, which has prompted revision of the law. This is compounded with the under developed digital copyright management systems,
- ii) Low levels of awareness by both the artists, the public, and enforcement personnel. Most of the rights holders (artists) in Uganda do not have much knowledge about the current copyright law itself or how they might seek protection from the state as they try to monetize their works. This study found that, while 90% of the respondents were aware of copyright law, only 10% had a proper understanding of how it functioned. The police who are supposed to enforce the law are not conversant with it and so cannot write charge sheets properly,
- iii) The process of enforcement and seeking legal redress for Intellectual Property violations is slow and cumbersome. Where cases have been taken to courts of law, it takes a long time to arrive at the verdict. The judicial system is slow and expensive (Ikoja-Odongo, 2010), and
- iv) The different copyright enforcement agencies lack technological manpower and skills to be able to cope with the level of development of technology used by pirates.

In relation to fashion, the National Textile Policy, 2009 proposed to: control the influx of second-hand clothes and counterfeits, which would result in attraction of more local and foreign direct investments in the sector; and increase the spinning and milling capacity from 20 million meters per annum to 180 million meters per annum in five years has not been implemented partly due to lack of an implementation strategy.

3.2.2 Governance and regulatory framework

Regulation of the creative industries is spread across several ministerial portfolios, often leading to policies that are either uncoordinated or contradictory (Figure 3). In 1995, the then Ministry of Youth, Culture and Sports was restructured and the Culture function was split into two leaving the docket of Culture under the Ministry of the renamed Ministry of Gender Labour and Social Development (MoGLSD) while the department of Museums and Antiquities was transferred to Ministry of Tourism, Wild Life, and Antiquities (MoTWA). However, the MoGLSD has a wide mandate with attention to diverse range of social issues including gender, youth, children, labour affairs and community development. It is over stretched to effectively support the creative industries, as well as establish and manage arts spaces across the country, amidst underfunding and understaffing. The Ministry of Finance, Planning and Economic Development (MoFPED) is tasked with and establishing a national film fund under the Uganda National Culture Policy (2006). The lack of coordination between these agencies and unified planning for growing the value of Culture and Creative Industries (CCIs) has led to inefficiencies, confusion, and high compliance costs for industry stakeholders.

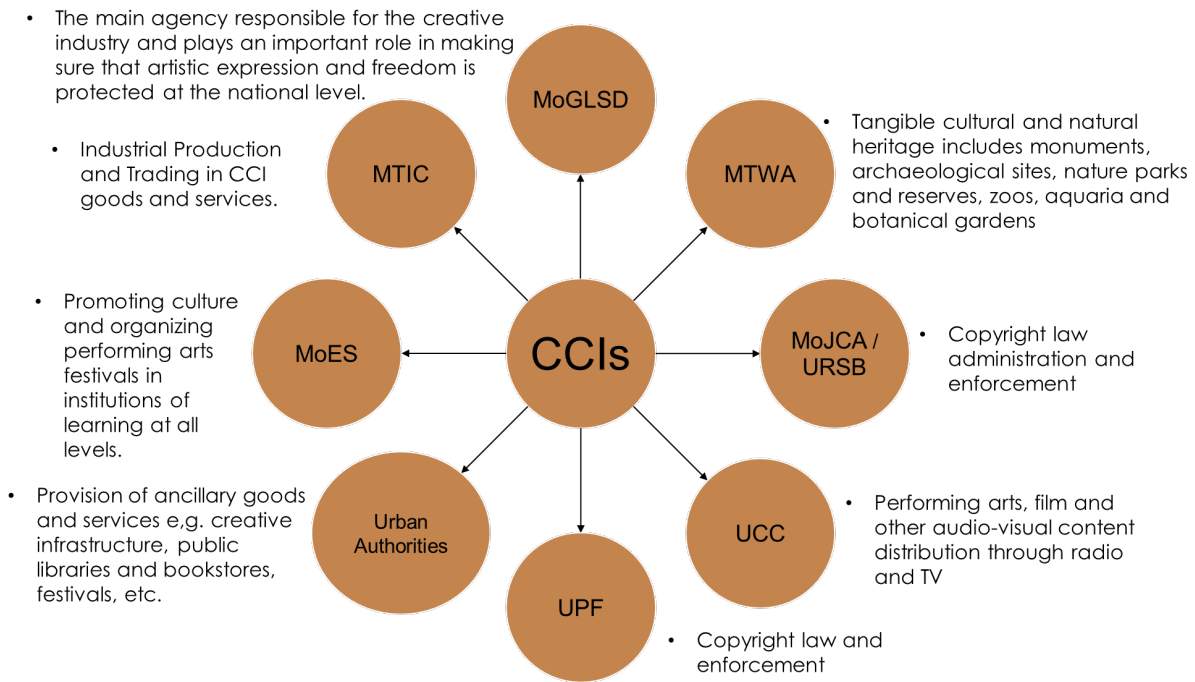


Figure 3: Ministries and Agencies responsible for regulation of the CCIs

The Copyright law administration and enforcement is by the Ministry of Justice and Constitutional Affairs (MoJCA), through the Uganda Registrations Services Bureau (URSB) and the Uganda police, which is expected to fight piracy. Likewise, MoJCA, through the Uganda Law Reform Commission (ULRC), spearheads the formulation and revision of laws pertaining to the culture and creative industry. The performing arts, film and other audio-visual content distribution through radio and TV are regulated by the Ministry of ICT and National Guidance (MoICT&NG), through Uganda Communication Commission (UCC) and the Media Council, which is mandated to carry out censorship and classification of media houses. Regulators such as Uganda Communication Commission (UCC) do not offer direct support to the enforcement of the Copyright law

Different stages of the design value chain are under the responsibility of different ministries. The responsibility for production of textiles and mass garment, which involves setting up factories, and promoting cross-border trade falls in the Ministry of Trade, Industry and Cooperatives (MTIC). The Ministry of Gender, Labour and Social Development tends to intervene mainly in the heritage and creative design aspects of the fashion sector, but not in other aspects of the ecosystem. The fragmentation of the sector across two ministerial portfolios often leads to the development of policies that are uncoordinated at best, or contradictory at worst.

Ministry of Education and Sports (MoES), which is responsible for promoting culture festivals in institutions of learning at all levels, has been unable to organize the annual national music and drama festivals for many years. The Ministry of Tourism, Wildlife and Antiquities (MTWA) and Uganda Wildlife Authority (UWA), are responsible for promoting cultural tourism; developing and promoting natural and cultural sites; and ensuring community, civil society and private sector participation in the conservation and promotion of natural and

cultural sites. However, local film producers, who wish to promote the country by showcasing tourism sites in their productions, are requested to pay exorbitant fees to access game parks (i.e., USD60 for each member of the film crew). This places a huge barrier to film production.

The Uganda National Cultural Centre (UNCC) is responsible for the provision and establishment of theatres and cultural centres, encouraging and developing cultural and artistic activities, providing accommodation for societies, institutions or organisations of a cultural, artistic, academic, philanthropic or educational nature. UNCC also hosts the NACCAU Craft Village, a prominent cultural market in Uganda. However, it is confined to Kampala and unable to spearhead regional festivals or events to grow the arts. This is partly attributed to the lack of development funding.

As provided for under the Uganda National Culture Policy (2006), a private sector-led body called the **National Culture Forum (NCF)** was established. It provides a platform for members in all the culture and creative domains of culture to collaborate and organize joint activities, advocate and lobby for its members and network locally and internationally.

The Copyright and Neighbouring Rights Act of 2006 and the Copyright and Neighboring Rights Regulations of 2010 provide for one collective management organization in Uganda per field.

The Uganda Performing Rights Society (UPRS) was set up in 2010 and registered as a collecting society in 2014 to manage the rights for music and music videos, including collection of royalties from television stations, radio stations, bars, etc. on behalf of the music artists. Up until that point, copyright in Uganda was managed by the Performing Right Society (PRS) in Britain¹⁵. As of 2021, UPRS had 4000 registered artists (including composers, authors, publishers, producers and performers of the musical works), with more than 16,000 songs in its repertoire (Muhumuza & Kasirye, 2022). The **Uganda Reproductive Rights Organisation (URRO)** was registered as a full collecting society in August 2014 with a mandate to act on behalf of authors and publishers of literary works to protect copyright, license users, collect fees, distribute royalties and contribute to the fight against book piracy. The **Uganda Federation of Movie Industry (UFMI)** is the copyright management organization/collecting agency for the film industry, with over 1,500 members, including filmmakers, writers, and industry professionals. The collective rights management bodies are subject to a complex range of taxes on collected royalties. UPRS, for instance, currently has income tax arrears of approximately Shs200 million. These taxes significantly reduce the royalties distributed to artists and hinder Creative Management Organisation (CMO) operations, limiting their ability to effectively support their members. In addition, appreciation of the role played by the collecting societies to create and promote collaborative efforts to safeguard IPRs is limited, with few artists and authors registered. These organization also lack credible systems of monitoring actual radio airplay and reliable sales data to inform the amount disbursed to artists. Collections are based on sampling research.

¹⁵ Uganda's sole radio station until 1993, Radio Uganda, paid royalties to PRS for the music played

The **National Library of Uganda**, which was established under the National Library of Uganda Act of 2003, is responsible for promoting the culture of reading and acquisition from any person or institution, any manuscript or literature that may be considered to be of interest to the country. However, it has not been effective in gathering, overseeing, safeguarding, and sharing Uganda's documented heritage.

3.3 Ancillary goods and services

These are goods and services that are not directly associated with cultural content, but facilitate or enable the creation, production, dissemination or exhibition of cultural works. They include; the internet, which is a major tool for the transmission, production and dissemination of cultural goods and services; co-working spaces, art studios, associations, creative hubs, festivals, etc.

3.3.1 Creative hubs and Co-working spaces

Through the private sector and development partners co-working spaces/art studios/associations/creative hubs have been established in different places around the Greater Kampala Metropolitan Area (GKMA). That offer different possibilities for an artist to use a space (for free or rent). These include:

- i) The **Makerere University Innovation Pod**, established under UNDP's timbuktoo initiative has created a space for young people to leverage creativity for good. The 200-person capacity unipod is open to all Makerere University students and members of the public on request.
- ii) **MoTIV (Makers of the Innovation Village)** in Bugoloobi, a Kampala suburb, offers an environment for creatives to innovate. MoTIV convenes a community of creatives and artisans to connect and develop new ventures and products. It provides Creators have access to high quality spaces, machinery/ tools, market access and value chain support thereby creating indigenous industry opportunities. Through this platform, creative entrepreneurs get access to both local and international markets. MoTIV houses and provides services to creatives such as animation creators, and performing arts. Artists sometimes lack the technical abilities required to produce the work on the selected medium. They may also find these services in tech or creative hubs. Some artists have their own production assistants.
- iii) **32° East Ugandan Arts Trust**, with support from development partners and independent philanthropists has built four art studios and a library (Wangusa, 2023).
- iv) **Circular Design Hub Kampala** is a co-creation and co-working space in Kampala where entrepreneurs, freelancers, designers, writers, product developers, marketing minds, tech start-ups, and makers and companies work on their own projects, while having the possibility of sharing, engaging and working with other like-minded creatives.
- v) **The Weaver Bird Arts Community** in Masaka City facilitates arts residencies, workshops, art camps and festivals for professional artists, with many artists from the East

African region participating. Weaverbird also has a sculpture garden with plenty of space for three-dimensional work and experimentation.

3.3.2 Festivals and events

Festivals and events provide artists with a platform to showcase their talent and creativity to a wide audience, which may sometimes extend across national borders. Festivals and events in Uganda have perhaps made their greatest contribution in the area of distribution and exhibition by acting as a meeting point for industry stakeholders, and providing exposure to artists. Aspiring artists, fashion designers, writers, dancers and poets are among those who directly benefit from attending the festivals and event. A number of festivals and events have emerged in Uganda including:

- i) The Uganda Film festival, organized by UCC with the aim of equipping local producers and filmmakers with hands-on skills in all aspects of film production;
- ii) The Amakula Kampala International Film Festival;
- iii) The Pearl International Film Festival (PIFF);
- iv) The Nile's Diaspora International Film Festival (NDIFF);
- v) The Kampala International Theatre Festival (KITF) is the major international theatre event in Uganda that attracts artists and audiences from all over Uganda and beyond. By 2024, KITF had 10 successful editions (including 2 virtual editions during the pandemic).
- vi) The Mariam Ndagire's Theatre and Performing Arts Festival, which started in 2022;
- vii) The Bayimba International Festival of the Arts;
- viii) The Revolutions International Theatre Festival (Ndere Troupe and Obuntu Pearls);
- ix) The Nyege Nyege Music Festival (Talent Africa);
- x) The Uganda International Fashion Week (UIFW);
- xi) The Bride and Groom Expo by the Vision Group;
- xii) The Laba Annual Art Festival, by the Ugandan German Cultural Society (GZK/ UGCS) and the Ugandan Artists Association
- xiii) UNCC National Art and Culture Festival;
- xiv) Kampala Contemporary Art Festival;

3.3.3 Awards

In a country where there are no formal funding opportunities, awards have turned out to be vital in getting the winning creators' next projects off the ground. For instance:

- i) The Uganda Film Festival has awarded winners of different categories with cash rewards, fully sponsored trips to international film festivals, laptops and other rewards that are relevant to the development of a filmmaker's career. Filmmaker Richard Mulindwa used some of his Shs37 million cash reward for his film *Freedom* at the 2016. Joseph Ken

Ssebagala used his fully-funded trip to Berlin International Film Festival in Germany, which came as a result of his film *House Arrest* winning the Film of the Year award at UFF 2015, to establish vital contacts that have since aided his future productions. He also used the several laptops given to him by the festival to equip his Zenken production studio. Other previous winners of UFF awards such as Matt Bish (Best Feature film, 2013), Nisha Kalema (Best Actress, 2015 and 2016) and Paresh Gondaliya (Best Editing, 2014) have spoken highly of the festival's monetary rewards and its implications on their careers (Kamukama, 2017).

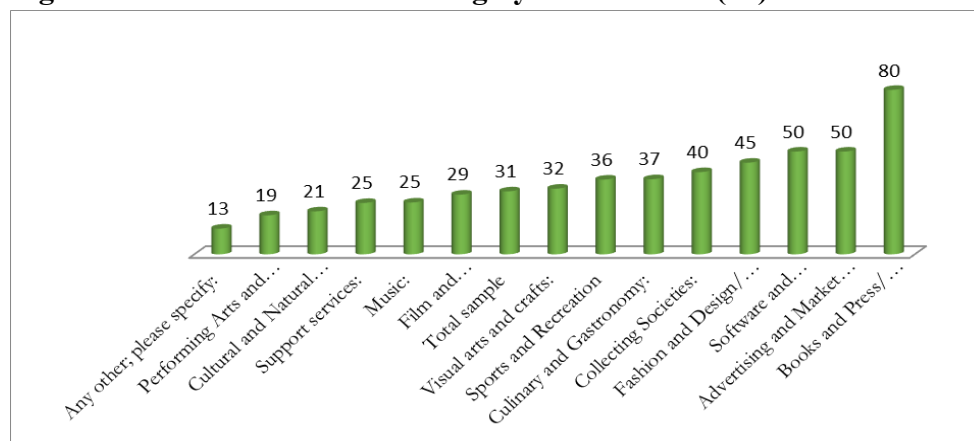
- ii) Ugandan filmmaker Loukman Ali was one of the six winners (out of 21 candidates) of a short film competition organized by Netflix, in partnership with UNESCO in October 2021. He received a production grant of USD 75,000 (through a local production company) to develop, shoot and post-produce his film under the guidance of Netflix-appointed supervising producer and industry mentors from across the continent. In addition, he received USD 25,000 to spend as he chose. His short film premiered on Netflix as part of “An Anthology of African Folktales” at Kenya’s Kalasha Film Festival in March 2023 (Netflix, 2023).

3.4 Education and training

Education is the process by which culture is transmitted between generations. It is also the means by which people learn to appreciate or form value judgements (e.g. a critique) about creative activities or products. Education and Training help individuals to acquire skills to create and produce cultural goods. Through continuous education and training, the required characteristics of creativity, skill and innovation will emerge. Continuous research, innovation and entrepreneurial skills are required in order to be able to compete in the creative economy. Through education and training people appreciate the outcome of the consumption of cultural goods and services or the social benefit of a participation in a cultural activity. Education serves also for the transmission of intangible culture in a formal or informal system that forms the identity of a community. Education and training, thus, play an important part in all creative domains and in all parts of the creative industries value chain.

Findings from the survey conducted by MoGLSD in 2014 indicate that some creative domains have high access to formal training compared to others. For instance, practitioners in literature and publishing (80%) and fashion design (45%) have high access to formal training compared to performing arts (18.97%) (Figure 4).

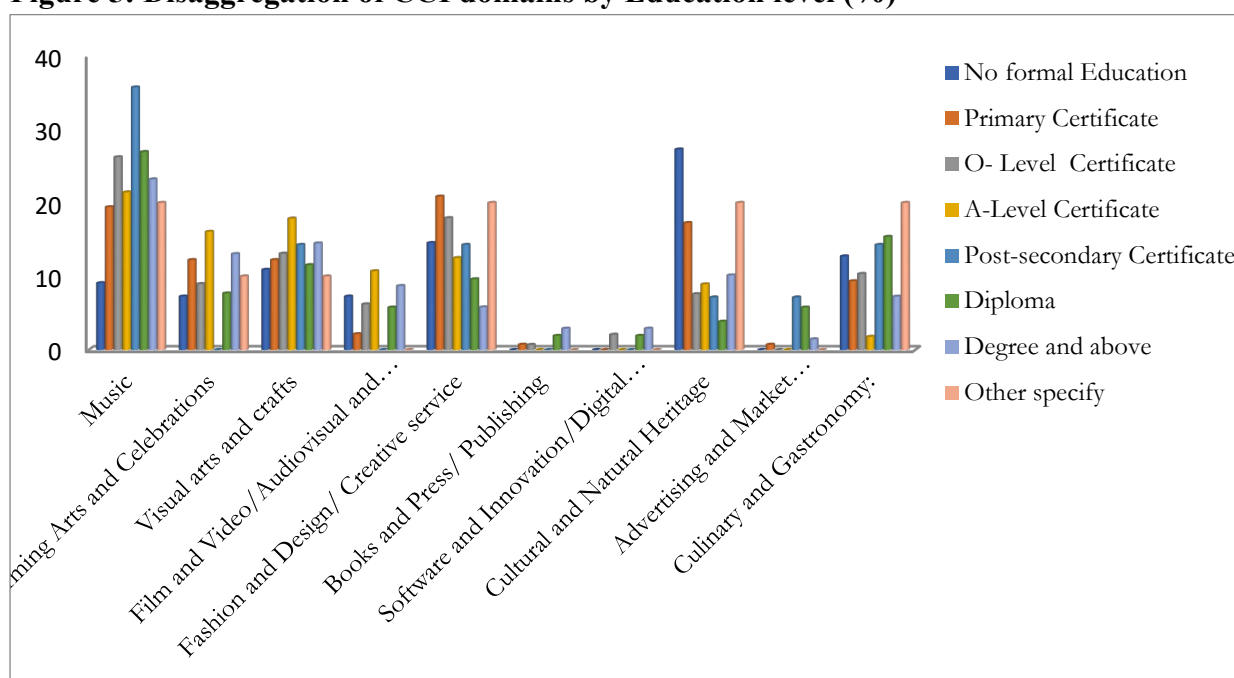
Figure 4: Access to formal training by CCI domain (%)



Source: MoGLSD (2014)

A portion (27.27%) of participants in cultural and creative industry had no formal education (MoGLSD, 2014). Domains like fashion and design/creative services had a high percentage with primary (20.86%) and O-Level certificates (17.93%) as shown in Figure 5.

Figure 5: Disaggregation of CCI domains by Education level (%)



Education and training support programmes for the cultural and creative industry sector exist in various forms in Uganda. However, they are not well resourced to address the various challenges that characterise the sector. They do not adequately meet the demands and ambitions of the growing cultural and creative industry.¹⁶ Notable education and training issues in the different creative domains are highlighted below.

- i) **Visual arts and crafts.** Most universities and secondary schools offer the fine art course/subject. The Margaret Trowell School of Industrial and Fine Arts at Makerere

¹⁶ Revised African Union Plan of Action on Cultural and Creative Industries

University continues to have a commanding influence on artistic production, throughout the region. However, most visual art education and training institutions in Uganda are inadequately-equipped and offer little exposure to contemporary visual art practice and critical thinking. The tertiary institutions and secondary schools' syllabuses provide fine arts as a subject, with little emphasis on administrative and managerial skills along the value chain. Consequently, many artists lack the necessary skills to be self-sustainable and have a clear understanding of the sector.

- ii) **Fashion design.** Informal apprenticeships and on-the-job training are still the norm in Uganda to acquire tailoring skills such as patternmaking, cutting, trimming, and stitching. Fashion education in Uganda is diverse, ranging from informal learning opportunities to formal education programmes and courses related to design, textiles, marketing, and entrepreneurship. There are a number of accredited institutions of higher learning in Uganda (including four universities¹⁷) offering qualifications in specific areas of textiles including; fashion and design, weaving, knitting, and silk reeling but at a very small scale. However, their curricula are not necessarily internationally competitive. Most of the existing curricula focus on creative components of fashion design, neglecting other essential areas such as quality control, fashion technology, business and entrepreneurship, trade law and copyright, which are essential to ensure that young creatives have the knowledge to protect their creations and develop their businesses. Often, talented young graduates end up entering the sector without being fully equipped with the necessary skills and knowledge to succeed (UNESCO, 2023). The facilities in training institutions, including sewing machines, are often outdated, non-operational, or lacking essential components (Bux, 2020).

Some of the gaps in fashion education in Uganda have been filled by alternative spaces such as hubs, incubators, and accelerators, which offer non-formal training to emerging designers and creators;

- a. **MoTIV**, with support from Mastercard Foundation, runs a six-month programme called Future Fashion, through which young fashion designers are taken through a hybrid of factory training and prototyping. The goal is to lift them from the level of amateurs to professionals ready to enter the fashion industry. It comprises four masterclasses including tailoring, fashion design and portfolio, and screen printing.
- b. **Fashionomics**, an initiative from the African Development Bank was developed in 2015. It is a digital platform providing concrete and practical information and training for fashion businesses. It provides free access to webinars and podcasts as well as numerous online and physical masterclasses on all aspects of the fashion business, with topics ranging from ethical fashion, sustainability and circularity, jewellery manufacturing, digital skills for fashion, and international trade, logistics, and e-commerce for fashion entrepreneurs. Its fashion incubator and accelerator programme

17 Makerere University, Busitema University, Kyambogo University, Nkumba University and Uganda Christian University

provide more tailored support to help emerging fashion entrepreneurs get to the next level (UNESCO, 2023).

- c. **Mazuri Designs Hub** is a social enterprise that sells beautiful African clothing and accessories. It also offers vocational training in fashion, design, and tailoring and entrepreneurial and personal skills training for out-of-school vulnerable young women to build their confidence and create employment opportunities.
- iii) **Music.** Few successful artists in Uganda were ever exposed to formal music education. Musical arts have generally been trivialized as psychologically less demanding, which qualifies them to be talents that come without effort. At tertiary level, Makerere University, Kyambogo University and the Uganda Christian University offer varied music courses at Diploma, Bachelor's and Master's level. However, they tend to focus on musical performance, with little attention to the supporting technological, financial and institutional aspects of the music industry, such as sound engineering, and artist production management. There are a few music schools in Uganda, most of which are located in Kampala. They include; Kampala Music School, MusiConnexions Uganda and Esom Music School. Even though they are not very well equipped as a result of small budgets, they offer appropriate music training to many people.
- iv) **Film.** Most actors in the film industry have acquired skills through apprenticeship, which is a limitation to professionalization and growth of a vibrant film sector. There exist a few formal film schools in Uganda, which offer training in acting, script writing, directing, and technical work in film production. The Maisha Film Lab, provides intensive courses in screenwriting, directing, producing, cinematography, editing, sound recording, and acting. In the last seven years, Maisha has a one year-round curriculum encompassing a variety of skill levels. By 2017, Maisha Film Lab had trained over 500 filmmakers across the East African region (Kamukama, 2017). Makerere University's Department of Performing Arts and Film offers film courses ranging from diplomas to master's programs. Other formal film training institutions include the Kampala Film School, a subsidiary of Kampala University; the Uganda Film and Television Institute, the Media Vision Academy; and Proline Film Academy.

The **Uganda Communications Commission (UCC)** partnered with the CineArts Academy to develop the skills of local filmmakers and content creators, to enable them compete effectively in both national and international markets. A total of 526 Ugandan film stakeholders enrolled in 15 different courses, including screenwriting (78), directing fundamentals (65), film production (42), voice acting (61), and film editing (40), among others (UCC, 2022).

In a country where formal film education is still rare and highly expensive, Film production workshops serve as the only opportunity for filmmakers to improve their skills (Kamukama, 2017). Through the Uganda Film festival, the UCC organizes production workshops aimed to equip local producers and filmmakers with hands-on skills in all aspects of film production. Other film festivals such as Amakula Kampala

International Film Festival, Pearl International Film Festival (PIFF), and Nile's Diaspora International Film Festival (NDIFF), have also been running production workshops where basic hands-on filmmaking skills are passed on to aspiring filmmakers. In addition, the MultiChoice Talent Factory, offers similar workshops

- v) **Performing arts.** There are various training centers for performing arts in various disciplines such as music, dance and drama. Both Public and private universities are offering performing arts related course. Makerere University's Department of Performing Arts and Film is one of the leading institutions offering wide-ranging of programs in the performing industry. Other universities such as Kyambogo, and the International University of East Africa (IUEA) provide courses in performing arts. Key private performing arts schools like Mariam Ndagire film and performing arts center and Bakayimbira school of performing arts (BASPA) skill and promote the performing arts industry in Uganda.
- vi) **Performing arts education in Uganda is based on the western type music knowledge and performance with little indigenous expressions.** It is rooted in the colonial missionary school ethos that demonized traditional music, and elevated western conservatory type music. A learner is praised as being a musician for playing a piano, pipe organ, or violin, but ridiculed if they played amadinda (xylophone), endere (notched flute), endingidi (tube fiddle), and akogo (lamellaphone) or performed any indigenous dances such as ekitaguriro, bwola, tamenhaibuga, okeme, akogo, mwaga, kizino, ntogoro, runyege, kikibi, mukumu, and agwara. In respect to indigenous music production a few urban-based cultural troupes collect assemble and train their performers in different genres and dances. These tailor performances for urban and international tourist audiences, which necessitates artistic modifications to suite market demands.
- vii) **Literature and Publishing.** In Uganda, training in literature and book publishing is carried out at four levels: formal training in institutions of learning, in-house by publishers, training organized by local and regional associations, and training by continental associations such as the African Publishers Network (APNET). Knowledge and skills are acquired in different aspects of publishing such as publishing management, editing, printing, photography, marketing and, legal aspects of publishing. The Uganda Publishers Association and the continental level African Publishers Network (APNET) organize workshops and seminars on weakness affecting their publishing establishments.

Cultural and Natural Heritage. The national "thematic curriculum" provides for the use of local languages as a medium of instruction in the early years of primary schooling, however, this is only partially applied and is not supported by a more comprehensive approach to "cultural education". Some secondary schools have arts clubs, cultural heritage clubs, and music and dance activities. Such initiatives, often focusing on the cultures of a specific or a diversity of ethnicities - can serve as spaces to transmit cultural heritage. However, apart from schools that teach local languages and literature, little or no space is left for such education. Where cultural aspects, such as language, music, dance and drama are taught, little connection is made between culture and its potential to foster development.

Aspects of culture feature or are implied in courses offered by some universities (archaeology, customary law, family law, ethno-botany, literature, local languages, ethnomusicology, and sociology). Makerere University now has an Institute of Heritage Conservation and Restoration, and offers an undergraduate degree in Archaeology and Heritage Studies where one of the courses taught is Cultural Heritage Studies. Other initiatives by individuals and institutions include the Ekisaakaate kya Nabagereka, an initiative by the Queen of Buganda to bring together young holiday makers to learn about their culture and cultural galas featuring traditional dishes, games, music, dance, drama and other activities are organised by different institutions across the country. Radio programmes on culture, often using local languages, are widespread.

- viii) **Culinary Arts.** Culinary arts education in Uganda is offered by both private and public institutions. The number of culinary education institutions have increased across the country due to the growth in the tourism and hospitality sectors that present opportunities for expansion and improvement. The Uganda Hotel and Tourism Training Institute (UHTTI) in Jinja Uganda's leading public institution dedicated to training professionals in culinary arts. Other institutions offering culinary and hospitality education include; YMCA Comprehensive Institute, Kampala University, and Makerere University Business School (MUBS) among others. Whereas, majority of these training institutions have revised their programs to meet international standards and have integrated indigenous Ugandan cuisine into culinary training to preserve and promote the country's rich food heritage, challenges persist in regards to offering culinary education services.

Whereas UHTTI revised their curriculum, some institutions still rely on outdated curricula that do not fully incorporate modern culinary trends which leads to production of low-quality graduates without globally competitive skills. Additionally, there is limited access to instruction materials, well-equipped training kitchens, modern baking and pastry facilities, advanced culinary technology and inadequate internship and apprenticeship opportunities, making it difficult for students to gain hands-on experience in cooking methods, and integrating diverse culinary techniques.

3.5 Archiving and Preserving

Archiving represents the collection and repository of cultural and creative works (movable objects and intangible) for the purposes of preserving for posterity, exhibition and re-use (e.g. the preservation of historic sites and buildings, sound archives and picture libraries). Preserving, on the other hand, relates to the conservation or preservation and management of particular cultural and natural properties.

Archiving and preserving activities can take place in each of the domains (an author's manuscript, the first performance of a work, a concert/exhibition programme). Archival material is also a reference point, which can serve as inspiration for new creation. The archiving and preservation components of fine arts, crafts, design, architecture, publishing and audio-visual industries can serve in turn as creative inspiration for new production. For example, historic houses preserve (and exhibit) architecture; museums and galleries conserve (and

exhibit) paintings, sculpture, jewellery and a wide array of other artefacts whose value resides principally in their design attributes (e.g., everything from furniture to cars); while archives preserve original documents such as manuscripts, photographs, books, films and radio recordings.

Given their fragile nature, most cultural and creative works deteriorate over time due to lack of proper care, hence the risk of losing the culture and history behind the art (Nkanze, 2023). Content creators, draw deeply on the cultural heritage of their society. They celebrate that culture, nurture it and pass it on to the next generation. Whereas digitisation has a dissemination function, it is considered part of preserving activities, especially for the publishing domain. However, there is no clear, formalized systems for assessing the value of cultural assets whether in terms of monetary compensation, preservation, or cultural significance, which leaves these artifacts vulnerable to mismanagement, undervaluation, and even irreparable loss, particularly as the country undertakes urban development projects, infrastructure expansion, or public construction. This has resulted in the loss of invaluable public artifacts, many of which are essential to the nation's cultural identity, history, and artistic legacy. For instance, without proper protection traditional fabrics such as *the bark cloth* are in danger of being viewed as a generic African fabric, diluting their socio-cultural and historical significance to the country. This may lead to a loss of potential revenues for the communities from which these fabrics have emerged.

4.0 Socio-economic contribution of the creative industry of the economy

4.1 Introduction

The Culture and Creative Industries (CCI) are mainly composed of micro and small informal enterprises. It is therefore, difficult to determine their economic and social importance, be it at the national or the global level. Nonetheless, according to the first global map of cultural and creative industries by Ernst & Young (2015), the CCI generated US\$2,250b of revenues and 29.5 million jobs worldwide in 2013. Within the total, the top three earners were television (US\$477b), visual arts (US\$391b), and literature & book publishing (US\$354b). With 29.5 million jobs, CCI employ 1% of the world's active population. According to Ernst & Young (2015), the top three employers are visual arts (6.73m), literature & book publishing (3.67m) and music (3.98m). The performing arts sector (including dance, theatre, live music, etc.) generated revenues of USD 127 billion and employed 3.52 million people worldwide in 2013 (Ernst & Young, 2015). Over three quarters (78%) of employees were creators and/or performers; 15% technicians and 7% were involved in venue management and organisation of stage performances (De Voldevere, et' al, 2017). Performing arts were the biggest employers in the informal economy, providing unofficial music and theatre performances (street performances, festivals and concerts that do not pay authors' rights, performances at marriages and other private events, etc.), which are often free for audiences.

CCI are a driver of the online economy, contributing US\$200b to global digital sales in 2013. Cultural and creative content powers sales of digital devices, which totalled US\$530b in 2013. Digital cultural goods were, by far, the biggest revenue source for the digital economy,

generating US\$66b of Business-to-Customer (B2C) sales in 2013 and US\$21.7b of advertising revenues for online media and free streaming websites (Ernst & Young, 2015).

Recorded music generated revenues amounting up to USD 25.9 billion globally in 2021, an increase of 18.5% in relation to the previous year (IFPI¹⁸, 2022). The global film market (content released digitally and on disc) reached USD78.5 billion of revenue in 2021, a 14 percent increase compared to USD68.7 in 2020. It is estimated that the film and video content accounted for USD5 billion in revenues in Africa and employed 5 million people - from actors to special effects experts to film festival organisers (UNESCO, 2021). The Pan African Federation of Filmmakers (FEPACI) estimates that the sector has the potential to create over 20 million jobs and generate USD20 billion in annual revenues because the demand for films ‘made in Africa’ is growing rapidly.

The global radio and television broadcasting market¹⁹ experienced significant growth in revenue, reaching USD143.29 billion for radio and USD287.81 billion for TV in 2023, from USD136 billion and USD271.12 billion in 2022 recording a 5.1 and 6.2 percent increase of the compound annual growth rate (CAGR), respectively. This growth was propelled by the surge in the number of radio listeners and high demand for television sets. Studios are increasingly allocating substantial budgets for TV shows to produce high-quality content. The availability of diverse revenue-generating platforms, such as video-on-demand services like Netflix and Showmax, encourages studios to invest in top-tier content production Broadcast & Cablesat (2023). The total literature and publishing industry revenue of 28 countries (which reported their sales and licensing revenue data) was USD 76.3 billion in 2022 up from USD 71.6 billion in 2021, with consumer (trade) books accounting for 50.5% of this, followed by children’s books at 13% (WIPO, 2022 & 2023)²⁰.

Beyond the economic benefits, the cultural and creative industries generate non-monetary value. For instance, the visual arts and crafts domains have greatly influenced the tourism sector as it attracts people from far and wide to attend art exhibitions, visit galleries, and experience the vibrant cultural scene. Museums and galleries are rapidly increasing, creating new consumer experiences, including health benefits. This art tourism has a bigger impact on the economy by bringing in money from tourists and creating jobs.

4.2 Contribution of Uganda’s creative industries to the national GDP

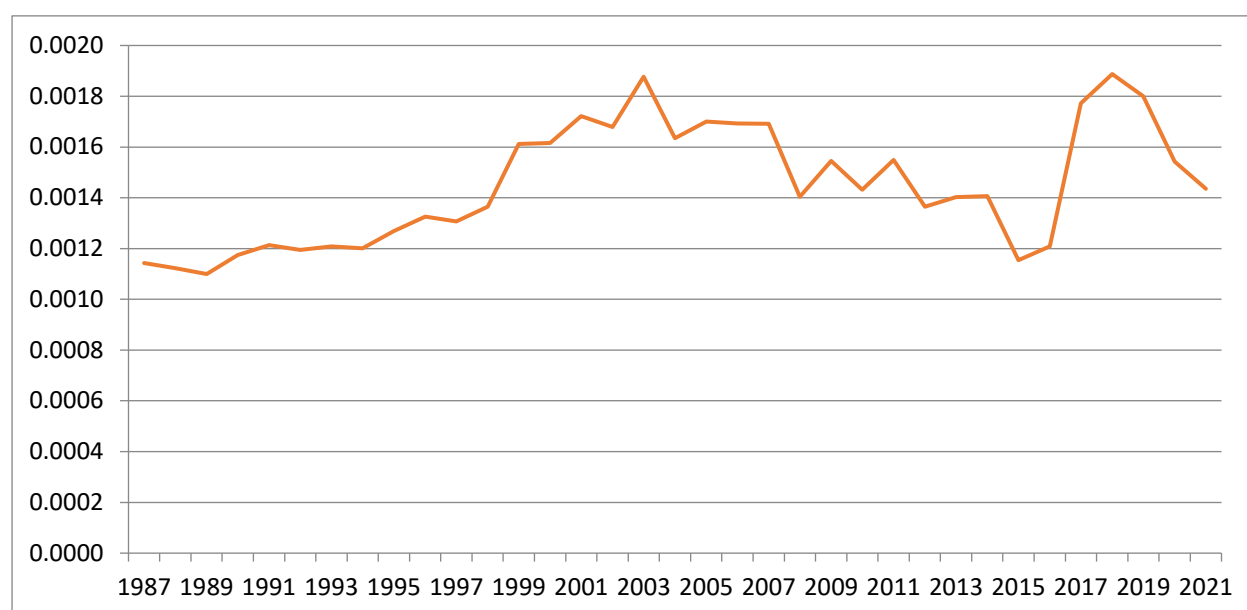
The contribution of the creative arts industry to Uganda’s GDP has fluctuated over the years. It saw a peak in 1999 at 1.61% and another peak in 2018 at 1.88%, with a noticeable dip around 2009-2010 and a rise again post 2015 (Figure 6). The fluctuations in GDP contribution highlight the need for stabilizing measures such as consistent funding, marketing, and international partnerships to ensure steady growth. Policymakers should focus on creating an enabling environment for the arts industry to thrive economically.

18 The International Federation of Phonographic Industries (IFPI) is the industry lead body and main source of information on world sales of sound recordings.

19 Consisting of revenues generated from sales of television and radio programs, sale of air time to advertisers and donations and subsidies earned by entities that operate broadcast studios and facilities for over-the-air or satellite delivery of radio and television programs.

²⁰WIPO (2022). The Global Publishing Industry in 2022

Figure 6: GDP from the culture and creative industries as a share of total GDP (1987-2021)



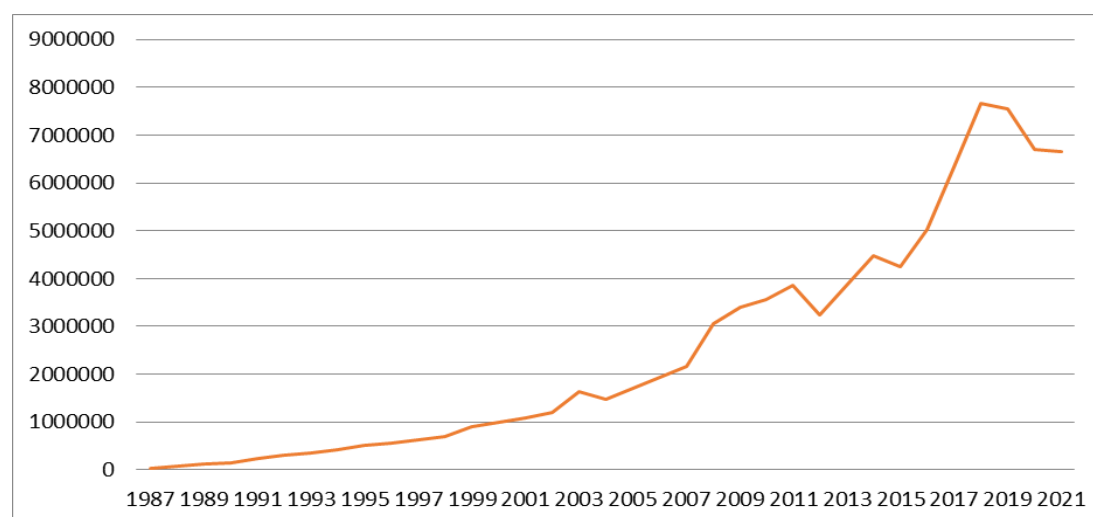
Source: UBOS

There are over 32 revenue streams within the CCIs that could be harnessed for tax and royalty generation. With approximately 12,460 SMEs in the culture and creative sector (UBOS in 2013), the culture and creative enterprises in Uganda are collectively estimated to contribute about Shs11.3 billion in domestic revenue. The CCIs are estimated to generate approximately Shs3.18 trillion in total business income based on analytical estimates. This income is approximately 3 per cent of Uganda's total GDP of Shs27.6 billion in 2017. It is estimated CCI enterprises could generate approximately Shs4.4 billion from Non-Tax Revenue (NTR) including Shs2.5 billion from license fees and Shs1.8 billion from business fees by enforcing regulatory requirements to formalize businesses.

A 15% excise duty on digital content services, such as music, movies, and e-books, which was included in the 2023 Income Tax (Amendment) Bill passed by Parliament in FY 2022/23 is expected to generate more revenue. Six percent (6%) and fifteen (15%) of the fee of local and international artists, respectively is withheld for taxes when they are hired. In addition, a 6% tax is applicable for expenses like chair rentals exceeding one million shillings. Artists earning over Shs235,000 monthly from their record labels are subjected to Pay As You Earn (PAYE) tax deductions (URA, 2023). Every weekend, Ndere Centre hosts a big number of diplomatic communities through its culture performance, where tickets cost not less than Shs30,000 for nationals and not less than Shs50,000 for foreigners. Performance fees for popular artists in Uganda range from Shs2 million to Shs10,000,000 for two hours of stage performance. According to the National Cultural Forum (NCF) telecom companies generated Shs78 billion (USD20 million) from Caller Ringback Tones (CRBTs) alone in 2019, 50 per cent of which was taken by the government in form of taxes. Additionally, UPRS, which collects royalties on behalf of musicians, collected USD191,770 (UGX710 million) from licensed music users in 2019, which decreased to USD66,714 (USD 247 million) in 2022. With increased compliance of paying clients a revenue of USD378,138 (UGX1.4 billion) was projected in 2023. (Caribou Digital, 2023).

Labour productivity (value added per worker) in the creative industries has seen a dramatic increase from Shs35,134.98 per worker in 1987 to Shs6,650,867.42 in 2021 (Figure 7). The significant increase in labour productivity suggests that investing in technology, training, and infrastructure for the arts can yield high returns. Policies should aim to enhance productivity by supporting innovation and improving access to global markets.

Figure 7: Evolution of labour productivity (GDP value added per worker) in the creative arts industry (1987-2021)

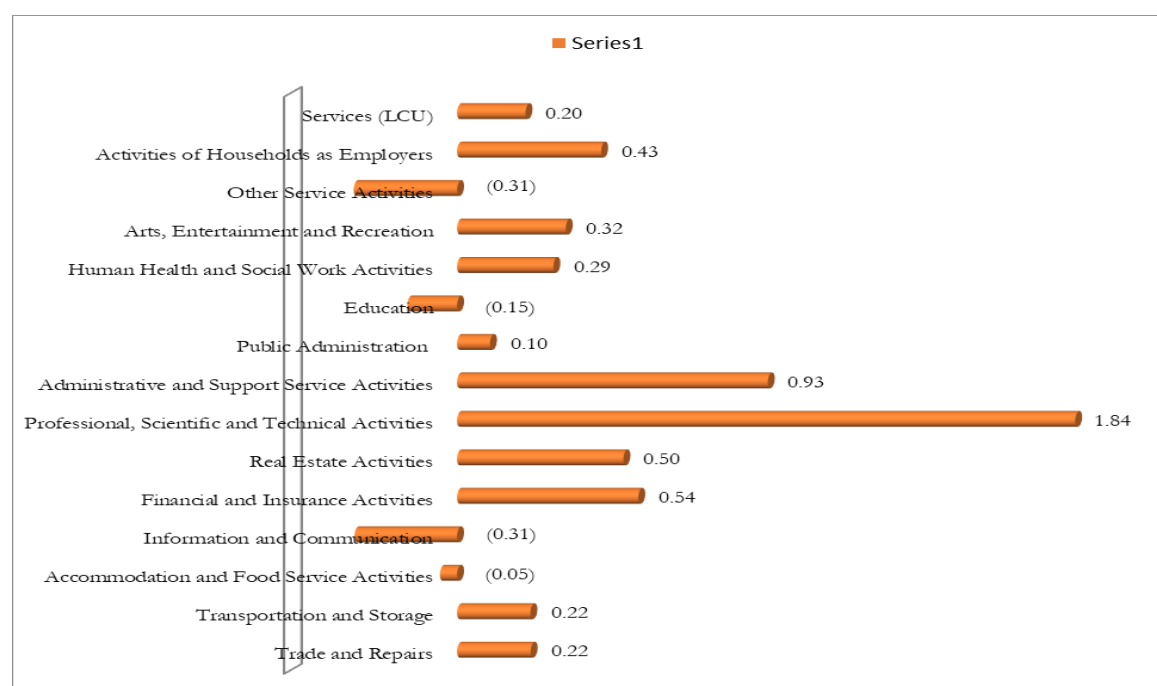


Source: Authors calculation based on UBOS data

4.3 Trends in productivity of the creative industries sub-sector Vs the services sector (2016-2021)

The creative industries sub-sector had varied productivity growth compared to other service sectors, with a notable positive change of 0.32%, while sectors like accommodation and food service activities declined by 5.10% (Figure 8). Given the relative stability in productivity growth, the creative industries sub-sector can be a key area for targeted investment. Encouraging cross-sector collaborations and learning can help maintain and boost productivity across the service industry.

Figure 8: Percentage change in productivity for the creative industries sub-sector Vs other services sub-sectors (2016-2021)



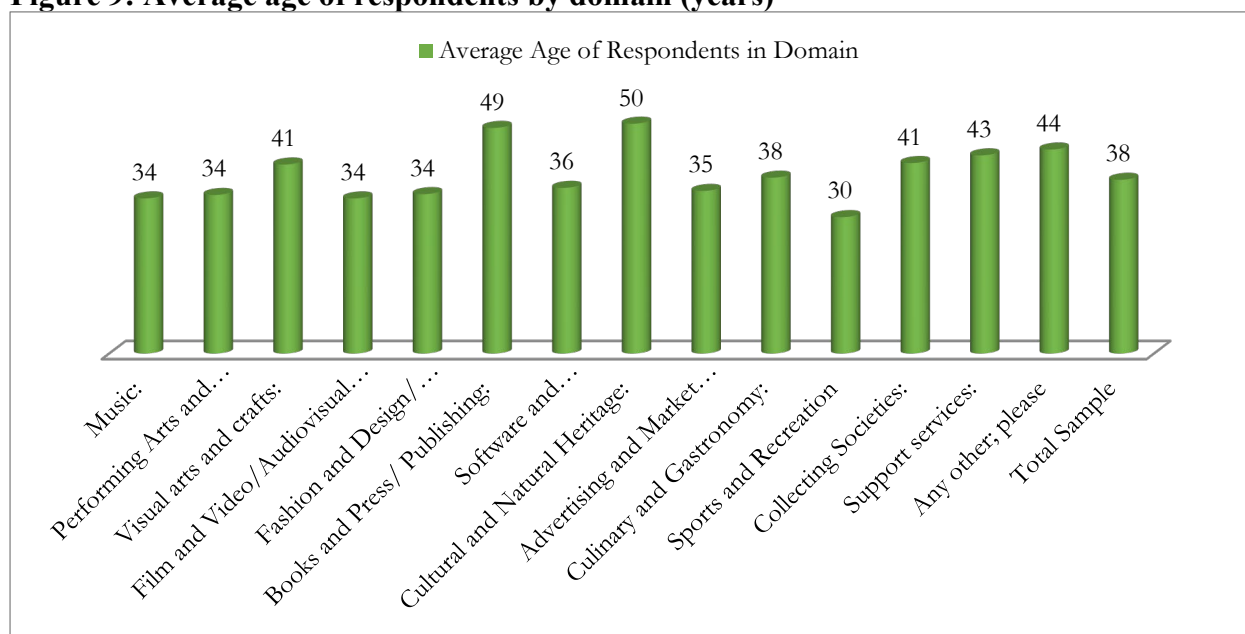
Source: UBOS

4.4 Employment generation

The culture and creative industries have a significant potential to solve the country's unemployment challenge. They are labour-intensive with a strong concentration of employment in music and performing arts domains. The major employment categories include; artists & performers, technicians, sound engineers, lighting designers, costume designers, set designers, and makeup artists. Additionally, administrators like managers, promoters, booking agents, handle the business aspects of the performing arts, including organizing events, marketing, and managing finances. Indirect players such as those involved in the hospitality and Tourism business such as restaurants, and transport service; media and journalists; and those involved in merchandising and retail such as those involved in sales of merchandise related to performances.

The creative industries are generally inclusive and forward-looking, attracting a disproportionate number of women and youth, hence essential for combatting youth unemployment. A 2014 mapping study by the MoGLSD revealed that practitioners in the music, film, performing arts, and fashion design were mainly youths. Those in cultural & natural heritage and literature & books publishing were older averaging 49.71 years and 48.8 years, respectively (Figure 9).

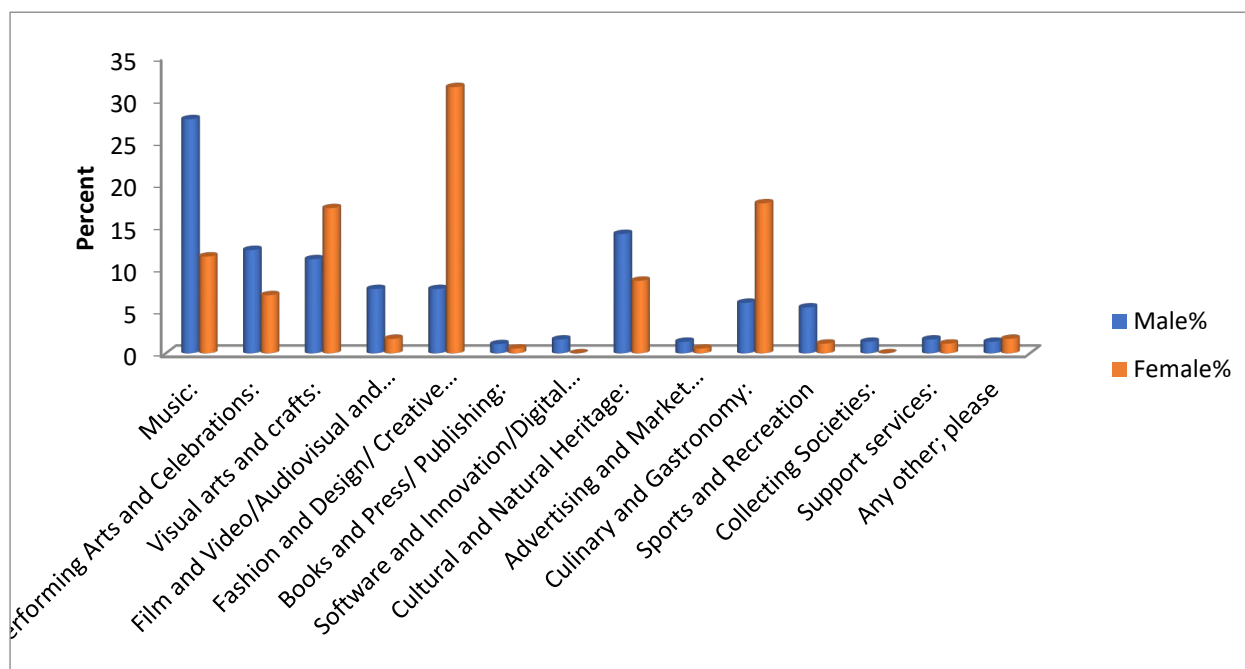
Figure 9: Average age of respondents by domain (years)



Source: MGLSD, 2014

Men dominate domains like Music (27.64%) and Cultural and Natural Heritage (14.1%), while women are significantly represented in Fashion Design (31.43%) and Visual arts and crafts (17.14%) (Figure 10) (MGLSD, 2014).

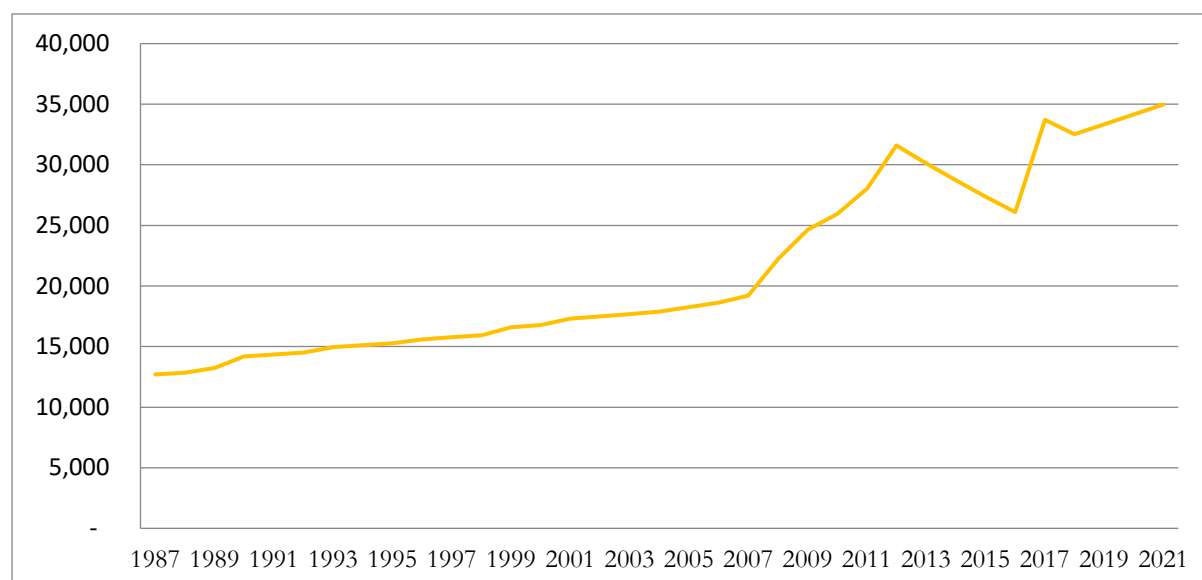
Figure 10: Disaggregation of CCI domain by gender (%)



Employment in the arts, entertainment, and recreation sub-sector increased to 34,980 jobs in 2021 from 12,703 jobs in 1987. There were notable spikes in employment growth, particularly in 2007 and 2017 (Figure 11). This indicates a growing sector that could benefit from policies that enhance skill development, provide financial support, and encourage

entrepreneurship within the industry. Supporting educational programs focused on the arts and entertainment can further boost employment opportunities.

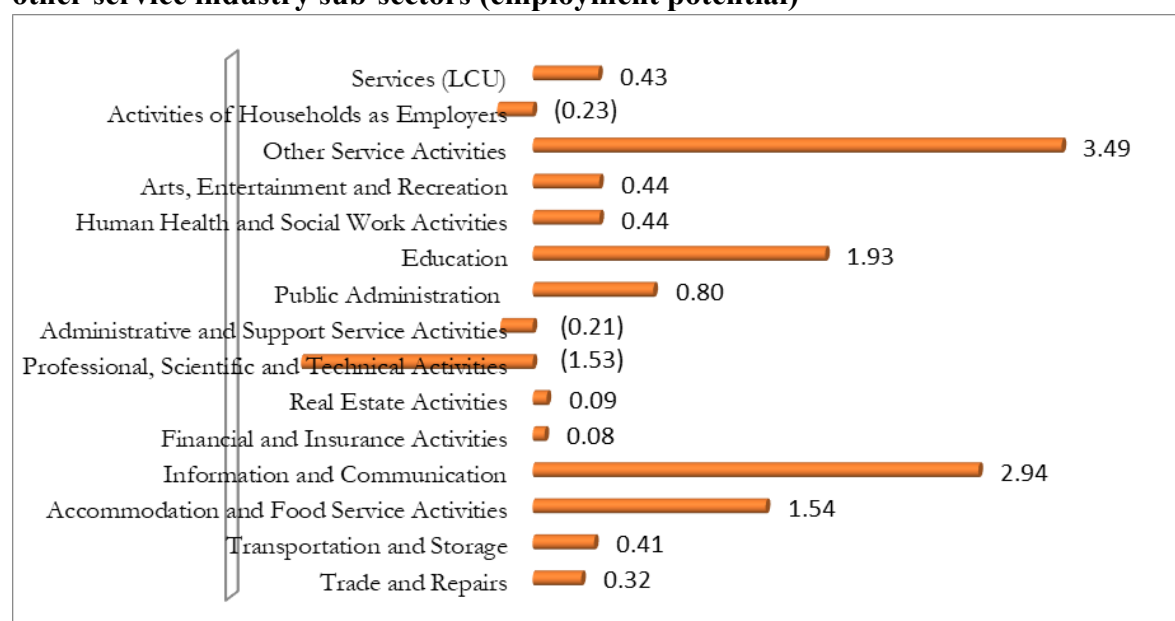
Figure 11: Number of jobs in the Arts, Entertainment and Recreation sub-sector in Uganda (1987-2021)



4.4.1 Employment elasticity of growth in the creative sub-sector Vs. the other service industry sub-sectors (2016-2021)

The employment elasticity for the creative sub-sector is 0.43, which is lower compared to sectors like financial and insurance activities (9.21) and information and communication (2.94) (Figure 12). This indicates that the creative sub-sector has less responsiveness in employment generation relative to output growth. Notable, if well leveraged, the creative sub-sector has the potential to generate a substantial number of jobs.

Figure 12: Trends in employment elasticity of growth in the creative sub-sector Vs the other service industry sub-sectors (employment potential)



5.0 Strategic issues of concern for the creative industry

5.1 Some of the laws and regulations stifle the potential of the CCIs

Table 2: Some of the Laws and regulations that stifle CCIs

Event/Action	Actor	Purpose
Copyright and Neighbouring Rights Law, 2006 and Regulations of 2010	MoJCA	• It does not take into account the management of digital rights, an ever-widening loophole; • The cost of enforcement and legal redress is long and costly • Limited appreciation of the CMOs (i.e. the Uganda Reproductive Rights Organization and the Uganda Performing Rights Society), with few artists and authors registered
The Stage Plays and Public Entertainment Act (Cap 49) and its attendant Rules, 2019 (S.I. No. 80 of 2019)	UCC	• Clamps down on artistic expression. Improvisation on stage without a script, is limited under this rule • Places a financial burden of facilitating the attendance of the UCC officer to the applicant in addition to payment of fees for permits. • Creates extra unnecessary layers of approval for staging a play or concert i.e UCC, Local Authorities, and Police)
The Uganda Communications (Film, Documentaries and Commercial Still Photography) Regulations of 2019	UCC	• Places a huge barrier to entry for film producers, with the requirement for proof of one's financial capacity or bank bond (under Reg. 10) as part of the application for the license to engage in film production
The Uganda National Cultural Centre (UNCC) Act of 1959	UCC	• Outdated. It doesn't accommodate the diverse and evolving nature of creative industries

5.2 Pervasive copyright infringement/piracy

Copyright infringement/piracy is a pervasive issue that impacts individual creators and undermines the entire creative economy. Piracy and counterfeiting in East Africa result in losses of approximately USD1.3 billion annually. In 2018, the Uganda Registration Services Bureau estimated that piracy of creative goods and services cost the country about Shs 400 billion (approximately USD 110 million) each year (Batambuze, 2024). The escalating piracy discourages investment in content production, limiting the financial viability of Uganda's cultural and creative industries and undermining job creation and competitiveness within the sector.

The persistence of piracy is attributed to the:

- i) Inadequacy of the existing legal framework (the Copyright and Neighbouring Rights Act, 2016, and the Copyright and Neighboring Rights Regulations of 2010) to deter copyright infringement, especially in the digital age;
- ii) Inadequate skilled manpower and appropriate technology by the different copyright enforcement agencies to cope with the pirates. The three licensed Collective Management Organisations (CMOs) i.e., UPRS, URRO, and UFMI face significant challenges in securing compliance for royalty payments from both government entities and a wide array of private users, leading to limited royalty collections and distributions;

- iii) Low levels of awareness of the existing legal framework by both the rights owners (artists), the public, and enforcement personnel;
- iv) Slow and cumbersome process of seeking legal redress; and
- v) Under developed digital copyright management systems.

5.3 Inadequate infrastructure to support the production and distribution of creative goods and services

The gross shortage of culture and creative infrastructure, including; production studios, theatres, cinemas, public libraries, art galleries & markets, artist residency facilities, performance venues, co-workspaces & community halls, and bookstores across the country is a significant barrier to the growth and sustainability of the creative industry. The country boasts of one public theatre (the National Theatre) located in Kampala with a seating capacity of only 377 persons; 42 public libraries, and one national art gallery (the Nommo gallery) and one national museum. The private sector investment in culture infrastructure is still limited with a few professional-grade theatres and cinemas; art markets; and co-working spaces/creative hubs, mainly located in Kampala and a few urban centers. In addition, the poor distribution networks for local creative products makes it hard for consumers to lawfully obtain creative goods and services.

Creative infrastructure is an important component of the value chains of the different creative industries. They are used: (i) as rehearsal space and a base for artists and art institutions to operate from; (ii) primary interface between the creators and their respective audiences; (iii) provide a platform for national and regional circuits for artists and art institutions to travel the country, and (iv) bring or take performing arts to the people and help create sustainable employment for the artists. Without a proper and functioning culture and creative infrastructure, the chain is weakened.

Globally, different governments have supported the creative industries through providing infrastructure and an enabling environment for them to operate. For instance, the Kenyan government created a dedicated Creative Fund to provide financial assistance and infrastructure support, such as subsidized rental schemes for studios and co-working spaces equipped with necessary facilities. Similarly, in South Korea, Seoul opened the Namsan Creative Centre in 2022, a facility equipped with an XR studio, recording and editing suites, and hologram facilities, aimed at supporting theatre and dance productions. In Nigeria, the Federal Executive Council in Nigeria approved the establishment of the Creative and Tourism Infrastructure Corporation (CTICo), a special purpose vehicle aimed at bridging the infrastructure deficit in Nigeria's creative economy. This was designed to unlock the economic value of Nigeria's creative and tourism sector through public-private partnerships.

5.4 Lack of suitable financial support systems

The proportion of the national budget allocated to the culture and creative industries is low. The budget allocation for the Department of Culture and Family Affairs under the MoGLSD in FY2023/24 was approximately Shs9.069 billion, or 0.016% of the Ministry's budget. However, most of the money is allocated to the division of family affairs leaving the culture division with hardly no money to spend on creative activities. The overall government

spending on the culture and creative industries²¹ hovered at 0.1% over the preceding five years (CfCA, 2024). Apart from the Content Development Support Programme (CDSP), established by UCC in 2021 to provide financial support to Ugandan production companies and individuals to develop audio-visual content, there is no dedicated budget line within public investment frameworks for supporting creative industries. The existing wealth creation initiatives such as the Uganda Women Entrepreneurship Programme (UWEP), the Youth Livelihood Programme (YLP), and the GROW program have not adequately served the needs of the creative industry. The requirements like group entry and trading licenses to access public funds create significant barriers for artists. The rigid conditions overlook the unique working structures of creative professionals. The level of informality among the CCIs is high, with a majority of CCI enterprises consisting of one to two entrepreneurial individuals, many of whom work from home and often do not possess trade licenses, limiting their ability to benefit from these programs.

Securing funding to finance production of creative works and services remains a significant challenge across all the domains. Financial products tailored to the cultural and creative industries (CCIs) remain scarce, with majority of creative works produced with self-generated capital. Many of the skills and professions linked to the creative industries are not recognized in business terms, thus making access to funding and or credit extremely difficult. In addition, until the moment of consumption, the economic success of most creative products or services is highly uncertain. This raises the question of who will take the risk to invest in the creation and/or production of such product or services. Without adequate financial backing, artists and creative enterprises struggle to sustain their practices, scale their operations, or compete in international markets.

The absence of a national framework or tool for valuing cultural and art products limits artists' ability to leverage their work as collateral for loans or financing. Contrary to other businesses, CCI business models do not correspond with the traditional financial products offered by commercial financial institutions. There is no underlying collateral in the form of tangible assets to cover the financing risk. Due to a lack of sound knowledge on how to assess the value of intangible assets (such as copyright, licences), financial institutions are reluctant to use these as collateral. Alternatively, private investors in the CCIs look more closely at the quality of business plans and management team within the CCI enterprises, which seek for financing. This creates a barrier to accessing credit and capital investment, which are crucial for the sector's growth and sustainability. Although the Security Interest in Movable Property (SIMP) Act supports intellectual property (IP) as collateral, financial institutions have been slow to adopt this practice, thereby limiting capital access for creatives.

Different countries across the globe have set up initiatives to propel investment and access into creative industries. Nigeria, for instance, launched the Renewed Hope Creative Economy Development Fund focusing on youth empowerment alongside IP- driven growth. South Africa's Mzansi Golden Economy (MGE) strategy funds cultural events and public art, alongside initiatives like Business and Arts South Africa (BASA) that foster private-public partnerships through grant support. South Korea allocated around 790 billion won in 2023 to content-related SMEs and start-ups, including a 410 billion won K-content fund to boost support international cultural exports. Meanwhile, India announced a \$1 billion creator

²¹ Including Performing Arts, Visual Arts, Cultural Heritage, Media, and Creative Services

economy fund, along with Rs 4 billion for a new Indian Institute of Creative Technologies in Mumbai.

5.5 Skills and training deficiencies

There are few structured programs/strategies aimed at identifying and nurturing talents from an early age. While creative arts are taught in schools, the focus is mainly on academic achievement over skills as some schools no longer organize Music, Dance and Drama concerts yet is a requirement for education institutions which was intended to identify talents. This has resulted into under-recognition of pupils/students within the school system. Additionally, career guidance and mentorship programs across all levels of education are lacking which has led to students making uninformed career choices and underutilization of their creative potential.

The government has not adequately invested in technical and vocational schools and training programmes in the arts and creative sectors. Government support has so far been limited to Directorate of Industrial Training (DIT) accreditation, with no comprehensive strategy to ensure these institutions are accessible across the country. Only fashion design is provided for among the major courses in the TVET syllabus. Programmes in performing and audio-visual arts are the least provided, despite the fact that it is the most common creative domains. This relatively low level of programmes on offer raises questions about how the domestic talent base will develop the necessary skills to participate fully in the global film and TV industry. Elsewhere, Kenya's dual TVET framework provides partnership with the private sector in equipping youth with digital skills in animation and video game design, directly linking training to industry needs. In South Africa, the Young Creatives Programme and CCI Masterplan prioritizes youth empowerment as well as systematic and long-term skill acquisition for the creatives. South Korea also invests in creative capacity by the Korea Funds-In-Trust (K-Fit) and promotes public-private partnership in training.

The inadequate publicly funded skilling facilities severely limit opportunities for Uganda's creative talents, most of whom are self-taught. Private institutions and individuals face numerous constraints that limit their capacity to scale up and meet the growing training demands. They are not well resourced to address the various challenges that characterise the sector. They do not meet the demands and ambitions of the growing cultural and creative industry (ULRC, 2024). The impetus of constant technological developments, the specific "technical" needs of the creative industries are changing very fast, calling for lifelong learning. The skills gap in areas like digital marketing, content production, distribution, intellectual property management, and creative entrepreneurship, directly impacts creators' market readiness and professional growth. In Nigeria, the Creative Leap Acceleration Programme (CLAP) was launched in collaboration with Google, to offer training to thousands of young creatives across various fields. Other programs like the African Creative Blueprint and initiatives supported by UNESCO, the EU, and USAID focus on upskilling youth, especially in digital creativity and TV production, while also creating a more enabling ecosystem for employment and entrepreneurship in the creative sector.

For the creative industries to thrive, creativity, education and training must go hand in hand. They should be considered together from early childhood interventions to tertiary curricula. The relevant knowledge and skills need to be taught and nurtured at the earliest

possible stage, and then integrated into educational approaches to developing talent, ignite creativity and establish viable career paths for future generations. Whereas, annual music, dance and drama festivals organized by the Ministry of Education and Sports form part of the co-curricular activities to complement the classroom teaching, there is declining participation of schools.

5.6 Market access and export barriers

The Ugandan creative industries face challenges related to market access. Despite Uganda's rich cultural offerings, there is a significant gap in marketing and branding that hinders the global visibility of Ugandan creative products. The key challenge within the local market is non-compliance with royalty payments to rights owners (the artists), limited enforcement of local content quotas, and lack of support for local CCI products within government. Uganda's visual artists face stiff competition from cheap imported art products from China, including curtains, carpets, office desks, and wall hangings. These products are commonly found in public spaces, hotels, and even government offices, which could otherwise showcase Uganda's unique cultural heritage. The local fashion industry is also hindered by public service standards that restrict office attire to Western-style suits, largely excluding African wear.

Festivals and events provide artists with a platform to showcase their talent and creativity to a wide audience, which may sometimes extend across national borders. The local community, aspiring artists, writers, dancers and poets can be counted directly benefit from attending festivals. However, apart from the Uganda Film Festival (UFF), all other festivals that would facilitate market access and collaboration opportunities for Ugandan artists are either dormant or struggling due to a lack of government-backing and incentives. Public concerts and events have faced steep declines in sponsorship, prohibitive venue rental fees - especially for public venues. In addition, increasing regulatory costs, including fees for Police, KCCA, NEMA, and other agencies, Negatively the profitability of events, and the visibility of artists.

The absence of targeted export support further restricts Ugandan creatives from reaching international markets. There is no or limited support for Ugandan artists to participate in major international creative industry events and art markets, which are crucial for facilitating collaborations and opening doors to global opportunities. These platforms not only provide market entry but also allow Ugandan creatives to "play on the big stage," enhancing their visibility, credibility, and connections in the global creative arena. The absence of a national committee or structured process to vet and select befitting artists to represent Uganda at these events leads to misrepresentation of the country's artistic identity. Robust backing for participation in international art markets would strengthen Uganda's position in the global creative economy, ultimately benefiting both individual artists and the country's cultural profile. Without such support, Ugandan artists miss out on critical networking, knowledge-sharing, and collaboration opportunities that could significantly elevate their careers and bring international attention to Uganda's rich cultural talent.

Elsewhere, countries are implementing several initiatives to promote creatives' access to global markets. In Nigeria, the Creative Leap Acceleration Programme (CLAP) offers an online platform various creative sub-sectors, serving as a one-stop shop for market access support.

There are also strong advocacy efforts for international distribution deals, co-production agreements, and intellectual property reforms to enhance Nollywood's global appeal and monetization. Similarly, South Africa has established the Cultural and Creative Industries (CCI) Masterplan, which prioritizes export promotion and trade facilitation creative products and services, reinforcing South Africa's presence in global cultural markets.

5.7 The digital shift

Understanding and adapting to the digital environment is still a challenge for the creative industries. The uneven access to digital platforms (either due to the high cost of internet and lack of net neutrality²²) and limited digital skills reinforces existing inequalities, with only a limited the number of creative practitioners able to engage in and benefit from the digital creative economy. Many creators are missing out on the new opportunities to produce and distribute their works to a wider public at a lower cost, independently of physical and geographical constraints. The costs of "going digital" (digitization of content, skills development and update of staff qualifications and complex issues concerning adequate digital rights management etc.) are high yet the returns on investment in and testing of new business models only come after some time.

Significant gaps exist in terms of fair remuneration for creators online, the use of copyright in the digital environment and the discoverability of digital creative goods and services content. The economic value is being displaced towards the end of the value chain, which in certain creative domains affects the effective reward for the producer of the creative product or service. The widespread adoption of digital gadgets has facilitated the easy distribution and access to protected content for free. Consequently, many of the creative industries, particularly the audio-visual and literature & book publishing industries, have been severely hit by piracy, which have shrunk their revenue earnings and consequently limited their potential to generate jobs and investment.

5.8 Lack of a cohesive and comprehensive regulatory framework

The Ugandan creative sector suffers from a lack of a cohesive and comprehensive regulatory framework to address the unique challenges facing the industry. Uganda's cultural and creative industries (CCIs) are operating under outdated legislation, which is ill-suited to today's dynamic and digital environment. Key examples include the Stage Plays and Public Entertainments Act (1949) and the Uganda National Cultural Centre Act (1959). There is no regulatory coherence, which has resulted in fragmented efforts and limited institutional support for the creative industries. Moreover, issues related to intellectual property rights and the protection of cultural assets remain unresolved, leading to the exploitation and undervaluing of local artists and creators.

²² The ability of content providers to freely distribute their works, and consumers to choose which content to consume, without the interference of governments or corporations

5.9 Weak associative structures within the different creative fields

The associative structures in place are quite weak and need to be reinforced. The main organizations include the: National Arts and Cultural Crafts Association of Uganda (NACCAU); Uganda Federation of Movie Industry; Uganda Musicians Federation; National Craft Association of Uganda; and the Uganda Advertising Association. There are also many smaller associations throughout all creative fields. However, the high degree of fragmentation does not provide the capacity to make effective changes in the different creative industries.

5.10 Difficulty quantifying the employment generated

Due to the high level of informality of the creative industries in Uganda, it is very difficult to quantify the employment. It is widely recognized that employment conditions for artists are often very precarious. Artists' contractual obligations are usually project-based, with long periods of unemployment between engagements. Most artists, particularly in the performing arts, work on an irregular, part-time basis, with limited or inexistent coverage for pension and medical schemes

6.0 Policy recommendations

6.1 Harmonize the Institutional and regulatory framework for the culture and creative industries

- i) **Create a dedicated department responsible for Culture and Creative Industries (CCIs) within the Ministry of Gender, Labour and Social Development and capacitate it to:**
 - a. Coordinate development and implementation of coordination of implementation cultural and creative sector related policies;
 - b. Provide direction for sustainable growth of the CCIs;
 - c. Support the CCIs to achieve their full economic potential, including financing and capacity building in undertaking production, importation, exportation and sale of culture and creative works; and
 - d. Undertake research and marketing of Uganda's creative works and experiences.

- ii) The Department responsible for Culture and Creative Industries (CCIs) should be structured along UNESCO's six (6) broad categorization of CCIs, i.e., 1) Cultural and natural heritage; 2) Visual arts and crafts; 3) Performance and Celebrations; 4) Design; 5) Audio-visual and interactive media; and 6) Literature and publishing (Figure 13);

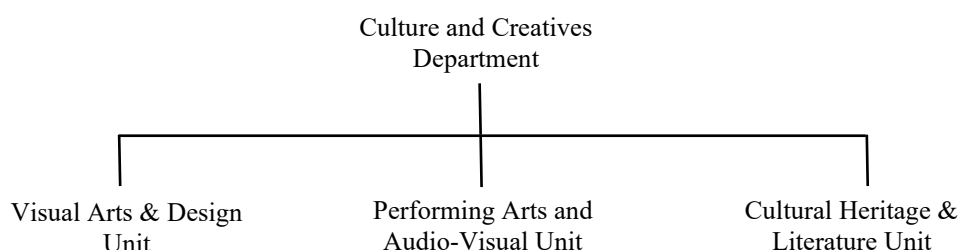


Figure 13: Proposed structure of the Department Responsible for Culture and Creative Industries

While the proposal for establishing a dedicated Ministry and/or an Arts (creatives) Council came out strongly from the creatives, it may not be feasible under the on-going RAPEX hence the proposal for a fully-fledged department under MoGLSD.

- iii) Strengthen the enforcement capacity of URSB and the Uganda Police Force through specialized and continuous training to combat digital piracy
- iv) Streamline the leadership of the different creative domains to ensure effective coordination and management; and
- v) Operationalize and enhance the capacity of the District Cultural Committees to address the unique local creative needs and improve nationwide sector coordination.

6.2 Repeal and amend outdated legislation to align with current and emerging trends in the creative industry

- i) Review and amended the UNCC Act, 1959 (last amended in 1965) to accommodate the diverse and evolving nature of culture and creative industries and broaden the UNCC Board's mandate beyond just "trustees of properties" of the National Theatre and Cultural Center on behalf of the artists, to include all CCIs, incorporate digital technologies, and delineate its governance structures with a robust management team.
- ii) Fastrack the amendment and implementation of the Copyright and Neighbouring Rights Act (2006) to cover private copy levy and expand protection for creative works within the digital environment;
- iii) Amend the Security Interest in Movable Property Act, 2019 to enable the use of copyright as collateral;
- iv) Review and amend the Town and Country Planning Act (Chapter 246) and the Physical Planning Act (2010) to provide for establishment of creative infrastructure in cities and municipalities;

- v) Streamline and simplify the process of acquisition of permits for staging plays organizing concerts, festivals, and/or film shoots by remove the unnecessary layers of approval created under the Stage Plays and Public Entertainment Rules, S.I. No. 80 of 2019;
- vi) Lower the barrier to entry for film production by removing the requirements for proof of one's financial capacity or bank bond as part of the application for the licence to engage in film production under the Uganda Communications (Film, Documentaries and Commercial Still Photography) Regulations of 2019;
- vii) Establish a formal valuation system for cultural assets in terms of monetary compensation, preservation, or cultural significance to reduce the vulnerability of artifacts to mismanagement, undervaluation, and even irreparable loss;
- viii) Integrate the creatives into the labour and social protection systems. This is vital to informal economic activity within the Culture and Creative Industry; and
- ix) Ratify and domesticate the World Intellectual Property Organization (WIPO) Internet Treaties to provide for reciprocal protection of Ugandan creative works trading online;

6.3 Strengthen the enforcement of and compliance to the copyright law

- i) Uganda Registration Service Bureau (URSB) should expedite the establishment of a centralised Intellectual Property (IP) registry for the creative industries, allowing artists to easily register their IP;
- ii) Enhance awareness among the general public, enforcement personnel, as well as cultural and creative practitioners, and entrepreneurs (regarding registration of their intellectual property) to increase compliance by all users of protected creative works;
- iii) Make provision in the copyright law to present a certificate of compliance to royalty payments from a recognized Collection Management Organization (CMO), as part of the considerations for license renewal for broadcasters and Telecom companies;
- iv) Equip the CMOs with appropriate technology for monitoring actual airplay on radios & TVs and reliable sales data collection systems to track royalty compliance annually
- v) Train and equip CMO staff with the requisite skills to cope with pirates; and

6.4 Improve funding and access to capital

- i) Gradually increase the budget for the culture and creative industry to ensure that it aligns with the African Union's (AU) 2021 recommendation that requires member states to allocate at least 1% of their national budget to the arts, culture, and heritage sector by 2030; and

- ii) The MoGLSD should allocate a dedicated and substantial portion of its budget to the creative industry to support planning, research, execution of creative initiatives, monitoring and evaluation
- iii) Establish a government-backed fund (or grant) for either sector-specific, or for the entire creative industries under the creative arts council. The fund can be financed through public and private sources. For example, through a levy on content users/distributors including broadcasters, internet service providers, etc. Government could make straight contributions or use a fund matching system;
- iv) Public commercial bank (Pearl Bank) should create financial products that are tailored to the CCIs; and
- v) Establish a government guarantee mechanism for cultural creative entrepreneurs to lower the financing risk and encourage funding of CCIs by financial institutions; and

6.5 Develop and improve infrastructure for production, distribution, promotion and preservation of creative goods and services

- i) In the **medium-term (NDPIV period)**, Government should redevelop the National Theatre to increase its estimated 377-seater capacity to at least a 2500-seater and repurpose it as a national multipurpose hub for all the creative domains; and
- ii) In the **long-term**, Government through Public-Private Partnership (PPP) arrangements, establish fully equipped regional multipurpose creative hubs, public libraries and museums for young artists and practitioners. These hubs would serve as creative, educational, and recreational centers, enabling young creators in the different fields to access equipment, training, and collaborative spaces at a low cost; and
- iii) Incentivize the private sector to invest in the development of creative infrastructure and acquisition of inputs and equipment required for improving and standardizing the quality of CCI products.

6.6 Improve market access and visibility for Uganda's creative goods and services

- i) Facilitate exceptional Ugandan creative industry professionals and practitioners (visual artists, artisans, musicians, filmmakers, fashion designers, etc.) to participate at major creative art markets such as international festivals, exhibitions, fashion weeks, trade fairs and award function;
- ii) Support private sector investment into digital platforms (such as online marketplaces for visual arts and crafts, audio-visual content streaming services) to increase digital presence of Uganda's creative goods and services;
- iii) Leverage the missions abroad to conduct cultural and creative diplomacy; and

- iv) Adopt a deliberate Government policy to consume (exhibit) local CCI products in public offices; and
- v) Enforce the local content quotas on media platforms by specifying local music, television drama series, films & documentaries, performing arts, visual arts, festivals and events, as part of the local content quota (not only news, talk shows and political programmes).

6.7 Establish robust data, research, and monitoring systems for the Culture and Creative Industries (CCIs)

- i. Strengthen national statistical capacities to generate reliable and disaggregated data on the Culture and Creative Industries (CCIs);
- ii. Support sector-specific research to build evidence for policy formulation, investment, and innovation in the CCIs; and
- iii. Establish regular monitoring and evaluation frameworks to track performance, measure impact, and guide sector development.

6.8 Close the skills gap

- i) The Ministry of Education and Sports should include, in the TVET curriculum, courses related to digital media, music production, film-making, fashion design, and entrepreneurship to equip Uganda's artists with the necessary skills to compete in the global creative economy;
- ii) Enforce the requirement of organizing annual national school music, dance and drama festivals to stimulate early interest in performing arts and creating a firm foundation for further education and training among children;
- iii) Provide supportive infrastructure for visual and performing arts teacher training to address the current skills and knowledge challenges within the creative industries;
- iv) Provide sufficient infrastructure and practical tools/materials at UHTTI to enhance hands on training for application of diverse culinary techniques; and
- v) Implement mentorship and networking programs for emerging Ugandan creators by connecting them with experienced professionals and industry leaders in their respective creative fields.

7.0 Conclusion

The cultural and creative industries hold immense potential for contributing to economic growth, through job creation, domestic revenue, and the global recognition of the country's rich cultural heritage. The country's rich history and cultural heritage is a strong foundation to build upon. The potential for audio-visual products, in both national and international markets, should be given attention. The performing arts domain seems to have the most potential in

terms of the national market and should be considered for its contribution to employment creation and to keep alive the local culture. The participation of performing artists in international festivals should be encouraged to promote cultural tourism.

Sustainable and competitive creative and cultural economy needs effective policy-making. In order to fully unlock the economic potential of Uganda's CCIs, Government should help shape the structure around which the creative and cultural economy develops including: IP regulations; local of creative infrastructure and cultural facilities; technology, internet and other telecommunications quality and access; tax regimes; education policies from school to tertiary; rights and status of artists; as well as, financial and administrative support.

It is essential that Uganda adopts a unified approach that nurtures local talent and ensures that the country's cultural and creative assets are marketed and protected effectively. With the right investments in policy, infrastructure, and human capital, Uganda's culture and creative industries can become a significant driver of economic growth, cultural exchange, and global influence. Enabling creative industries professionals and practitioners to network abroad, attend fairs and build alliances is crucial for opening up markets. In addition, the creation of festivals and large events can be extremely beneficial to the development of the creative industries.

In a complementary manner, the study has pointed out key issues of concern and made various policy recommendations with the intention of ensuring that the creative industries are competitive both in local and international markets. It is expected that this will contribute to formulation of a comprehensive culture and creative industries policy to enhance the creative economy in Uganda on a sustainable and long-term basis.

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