SIFA
Skills Initiative for Africa
TC
Technical Cooperation

EMPLOYMENT AND LABOUR IN THE CREATIVE INDUSTRIES

NIGERIA - FINAL REPORT

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ABBREVIATIONS

APCON	Advertising Practitioners Council Of Nigeria
ARCON	Architects Registration Council of Nigeria
AU	African Union
AUC	African Union Commission
AUDA	African Union Development Agency
AUDA NEPAD	African Union Development Agency - New Partnership for Africa's Development
B2B	Business to business
BOI	Bank of Industry
BR	Brazil
CAGR	Compound annual growth rate
CBN	Central Bank of Nigeria
CCI	Cultural and creative industries
CI	Creative Industries
CN	China
COVID-19	Corona virus disease 2019
DESA	United Nations Department of Economic and Social Affairs
ELS	Employment and labour study
EUR	Euro
FADAN	Fashion Designers Association of Nigeria
GDP	Gross domestic product
GNI	Gross national income
GVA	Gross value added
HS	Harmonized System (tariff nomenclature, classification)
ICT	Information and telecommunication technology

IDB	Inter-American Development Bank
IFC	International Finance Corporation
ILO	International Labour Office OR International Labour Organization
ISCO	International Standard Classification of Occupations
ISIC	International Standard Industrial Classification of All Economic Activities
ITU	International Telecommunication Union
MSME	Micro, small and medium-sized enterprises
NBC	National Broadcasting Commission
NBS	National Bureau of Statistics
NCAC	National Council for Arts and Culture
NCC	Nigerian Communications Commission
NG	Nigeria
NGN	Nigerian Naira
NITDF	National Information Technology Development Fund
NFVCB	National Film and Video Censors Board
NTDC	Nigerian Tourism Development Corporation
PC	Personal computer
Q1	first quarter (Q2 … second quarter, Q3, Q4)
R&D	Research and development
SIFA	Skills Initiative for Africa (program)
SKYE	Skills Development for Youth Employment (program)
S4YE	Solutions for Youth Employment (program)
G20	Group of Twenty
SWOT	Strengths, Weaknesses, Opportunities, Threats (chart)

TVET	Technical and Vocational Education and Training
UIS	UNESCO Institute for Statistics
UK	United Kingdom
UN	United Nations
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Program
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNSD	United Nations Statistics Division
US	United States (of America)
USA	United States of America
USD	United States Dollar
WIPO	World Intellectual Property Organization

For additional organizational abbreviations see also tables T.05 and T.08

INTRODUCTION

1.1 Background and objectives

The Skills Initiative for Africa- Technical Cooperation (SIFA TC) is a programme of the African Union to facilitate a continental dialogue and knowledge exchange on employment-oriented skills development in collaboration with the private sector. SIFA TC is implemented by the African Union Development Agency (AUDA-NEPAD) and co-financed by the German Government and the European Union. The initiative is supported by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ), the International Labour Organization (ILO) and the European Training Foundation (ETF).

Knowledge exchange and dialogue take place through national, regional, and continental dialogue events and through the African Skills Portal for Youth Employment and Entrepreneurship (ASPYEE), which is an open resource platform for sharing good practices, policy briefs, case studies and practical toolkits for actors in the vocational education and training value chain. Curated good practices from various African countries are shared on ASPYEE to enable peer-to-peer learning through communities of practice. This provides technically sound and usable knowledge products that can be adapted to suite the unique local nuances in each country or region.

SIFA TC implements its work through partnerships with private and public sector stakeholders in the TVET ecosystem.

This study mainly contributes to SIFA's knowledge repository by developing and testing a tool for analyzing the labour and employment issues, including identifying skills gaps that need to be bridged, **specifically for the creative industries** which have over recent years become a new focus for promoting additional employment opportunities, notably also for young people.

Skills gaps to be bridged always need to be seen in the context of the labour markets they relate to, cannot be isolated from them, and sometimes only a combination of measures may lead to resulting employment. The present study is based on a trial run in Nigeria under the conditions of the Covid-19 pandemic and shares lessons learned and conclusions for best practices on finding out about some of the important ‚nuts and bolts' measures for promoting employment-oriented skills development in the creative industries in two sub-sectors that are attracting young people: **fashion** and **games development / esports.**

1.2 Methodology

The methodology is based on the German three-pillar (plus one roof) approach to employment promotion which is frequently used to guide the description and understanding of the employment situation and the labour market in a country, sector, or region in German development cooperation. The different elements of this approach are summarized in the following graph and may be addressed in respective analyses, sometimes comprehensively, sometimes focusing on selected aspects while embedding them into the whole.

In practice, such analyses usually are based on information that is already available and therefore reduces information collection costs, though, where resources are available, some additional research may be supplemented to fill essential gaps. does not cause too much data collection. In order to achieve this, the approach provides ample leeway to consultants in which way to research and implement this kind of a study.

FRAMEWORK CONDITIONS

Governance, Political Situation, Rule of Law, Macroeconomic Stability, Demography and Migration, Enabling business and supply side environment.

LABOUR SUPPLY	LABOUR MARKET: MATCHING	LABOUR DEMAND
EMPLOYABILITY OF WORKFORCE	**BALANCE LABOUR SUPPLY AND DEMAND**	**CREATE PRODUCTIVE AND DECENT WORK**
• Quality and accessibility of general and higher education • Quality and accessibility of TVET • Workforce development in selected sectors • Labour migration management • Lifelong learning • Livelihood programmes for displaced people • Health status of population	• Transition from education/ training into employment • Active and passive labout market policy and programmes (e.g. Information, Job and Career counselling, placement, internships, on-the-job-training,...) • Capacity of key stakeholders (e.g. public and public providers, NGOs) • EMployment services/ programmes for specific target groups • Labout code and labour regulations	• Access to finance • Empolyment oriented private Sector (SME) promotion programmes • Sector and value chain development • Market access e.g. for rural areas • Self-employment development • Capacity of entrepreneurs/ employers

G.01 German three-pillar approach to Employment Promotion.
Source: GIZ.

For conducting this kind of study at a **sector level**, in this case the creative industries, the general structure needs to be adapted to relevant topics. In-depth analysis of framework (e.g., economic) constraints are usually not part of a sectoral study because the focus lies on sector-specific constraints and opportunities. Some references to framework conditions, however, cannot be avoided, particularly if an overall study of this type does not yet exist.

Standard sequenced process steps for these employment and labour studies were implemented and resulted in the following timeline.
1. Desk research (October 2021- December 2021)
2. Field research (January 2022- July 2022)
3. Dissemination (July 2022 and after)

Given the lack of creative industries satellite accounts in Nigeria and the scale and diversity of the country, the differing definitions, and the timeframe and resources available, it was agreed this study will **focus on two sub-sectors of the creative industries** in order to be able to gain sufficient depth of analysis.

The main **sources** of information from the field were interviews held with diverse industry stakeholders in the two sub-sectors and selected central government entities.

- During the desk phase, we experimented whether interviews could be conducted online, making use of the increasing acquaintance with and usage of **web-conferences** as imposed by the pandemic. This approach therefore was continued during the field research.

- Given negotiating meetings with industry stakeholders turned out to be a very time-consuming and thus rather arduous task (see remark on duration below), we switched over to an **online survey tool** in a bid to also get in touch with a few further stakeholders pressed for time and possibly worried about confidentiality, using the results from previously completed interviews to formulate the survey questionnaire. The link for responses was distributed using our own channels and those

available to GIZ into the two sub-sectors selected. Returns were too low in numbers to give us representative statistical data that could be analyzed with statistical methods (and even if, given we had no control over the exact distribution, as a convenience sample such an analysis would have only been valid for the sample itself), but the returns served as a very good basis for a lively and productive discussion during the validation workshop (see below).

- Most numerical data has been extracted from published statistics or reports. Special thanks go to the National Bureau of Statistics (NBS) for extracting occupational data at the 3-digit level from its much broader quarterly labour force surveys, thereby strongly contributing to our attempt at narrowing down employment figures in creative industries.

Field research also included a **validation workshop** in July 2022 at Lagos with stakeholders from government and the two creative industries sub-sectors fashion and games development / esports. During the workshop key preliminary findings were presented to the stakeholders, breakout sessions were conducted for discussing findings at sub-sector levels, which were subsequently brought back to the plenary for discussion and clarifications.

The **duration** of the whole assignment is mainly **explained** by prevailing Covid-19 travel restrictions (including those in the countries where the international consultants are based as well as countries of their further assignments) and difficulties to pin down key stakeholders in the creative industries who were hesitating for fear of sharing trade secrets with third parties and competitors and/or who in some cases showed clear elements of donor fatigue as a result of frequent calls to offer their opinion or information to specific missions or events. In other words, time for building trust with stakeholders, flexible distribution of consultant time in short sequences over a long stretch of time, and persistence in faith and patience at the ends of GIZ SKYE and GIZ SIFA were **important ingredients** to successful completion.

2. FRAMEWORK CONDITIONS AND THEIR IMPACT ON THE CREATIVE INDUSTRIES

Geographical Situation

Nigeria is situated in West Africa and has the largest population in Africa (estimated at 212 million inhabitants in 2021) and is the seventh largest country in the world. With an annual rate of population change of 2.6%, just past the estimated peak, and a respective population doubling time of 27 years,[1] it is currently on track to becoming the third most populous country (after India and China) by the middle of this century. Lagos, the former capital of the country is the financial capital of the country (with two ports into the country contributing to its status as a trade hub – there is another port in Port Harcourt, and a deep-sea port is being developed in the Lekki Free Trade Zone). Abuja is the administrative centre of the country.

The country is inhabited by more than 250 ethnic groups with a count of 529 languages (7 of which are extinct) in 2014 and thereby constitutes one of the "most multilingual" countries of the world. None of the ethnic groups constitute a majority of the inhabitants, although Yoruba, Hausa, and Igbo are the largest and their languages are counted as official languages next to English which functions as the national language. The Yoruba, Hausa, Igbo, and Fulani ethnic groups jointly represent over 60% of the population. A total of 71 ethnic groups represents 90% of the population.[2]

This diversity constitutes an enormous reservoir of traditions and cultural practices that can be drawn on for developing the creative industries. At the same time, this diversity is also a factor in the country's fragility. Violent conflicts in specific regions of the country have been fracturing the national landscape, the most persistent one over recent years being the Boko Haram jihadist group activities in the Northeast of the country.

Patterns of Economic Development in the Past

Nigeria discovered petroleum in the 1950s and became a major producer in the late 1960s. This enabled government revenues to rise from 10% of GDP in the 1960s to 30% in 1980s on the basis of increasing the share of petroleum in exports. Since the 1970s the oil and gas share in exports amounts to 9 tenths of total exports. Even though petroleum production only accounts for 11% of GDP in the past decade, resulting total fiscal and export revenues stood at 47% and 84% in 2019, reflecting a strong dependence on the petroleum economy.[3]

Non-petroleum sector growth in the recent past has a strong positive correlation with movements in oil prices. This is attributed to the fact that high (respectively low) oil prices allow for higher (lower) imports of necessary goods and services as inputs to non-petroleum sectors and higher (lower) fiscal revenues that may contribute to non-petroleum growth through government spending. The sectors most sensitive to variations in the oil price are, by decreasing importance, entertainment (a creative industries sub-sector), accommodation, manufacturing, utilities, followed by construction, other services, and education.[4]

Economic growth in all major sectors that may usually contain creative industry sub-sectors therefore is sensitive to oil price developments. Whether creative industry sub-sectors themselves are able to significantly contribute to a diversification of exports is doubtful at this time. Nigeria as a country with a large population and internal market, however, is not per se dependent on exports to increase contributions of the creative industries to GDP.

[1]Cf. UN DESA WPP 2019.
[2]Leclerc 2019.
[3]IMF 2021: 17-18.
[4]Ibid.
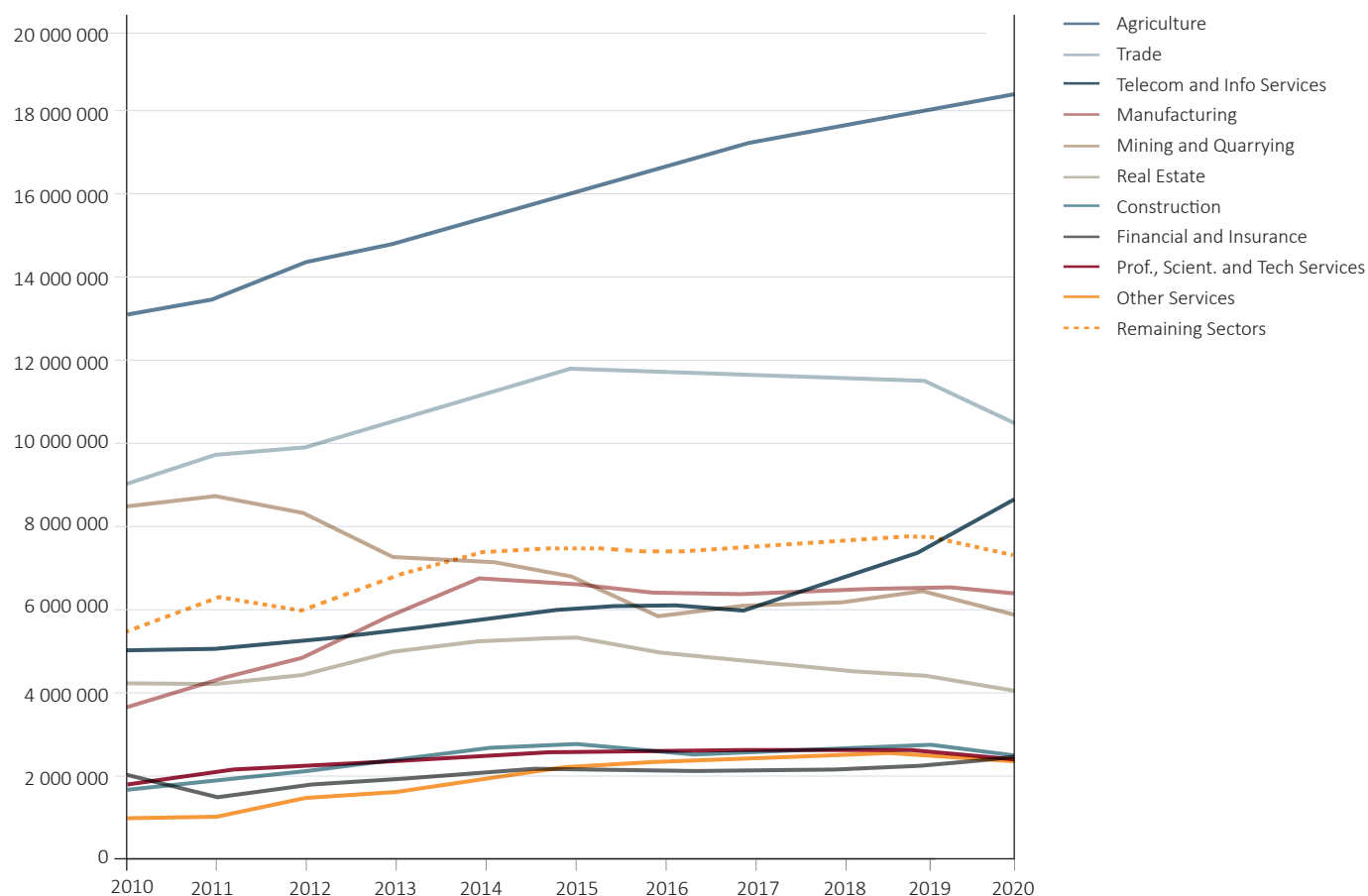
G.02 Real GDP development trends by economic sectors in constant NGN million 2010-2020.
Source: NBS data.

There is one sector in Nigeria's economy which over the last decade is consistently displaying a growth trajectory in real terms: agriculture. The second GDP sector that displays comparably strong growth are telecommunicaion and information services. Other sectors' growth has been more modest and a few are in decline over the past decade.
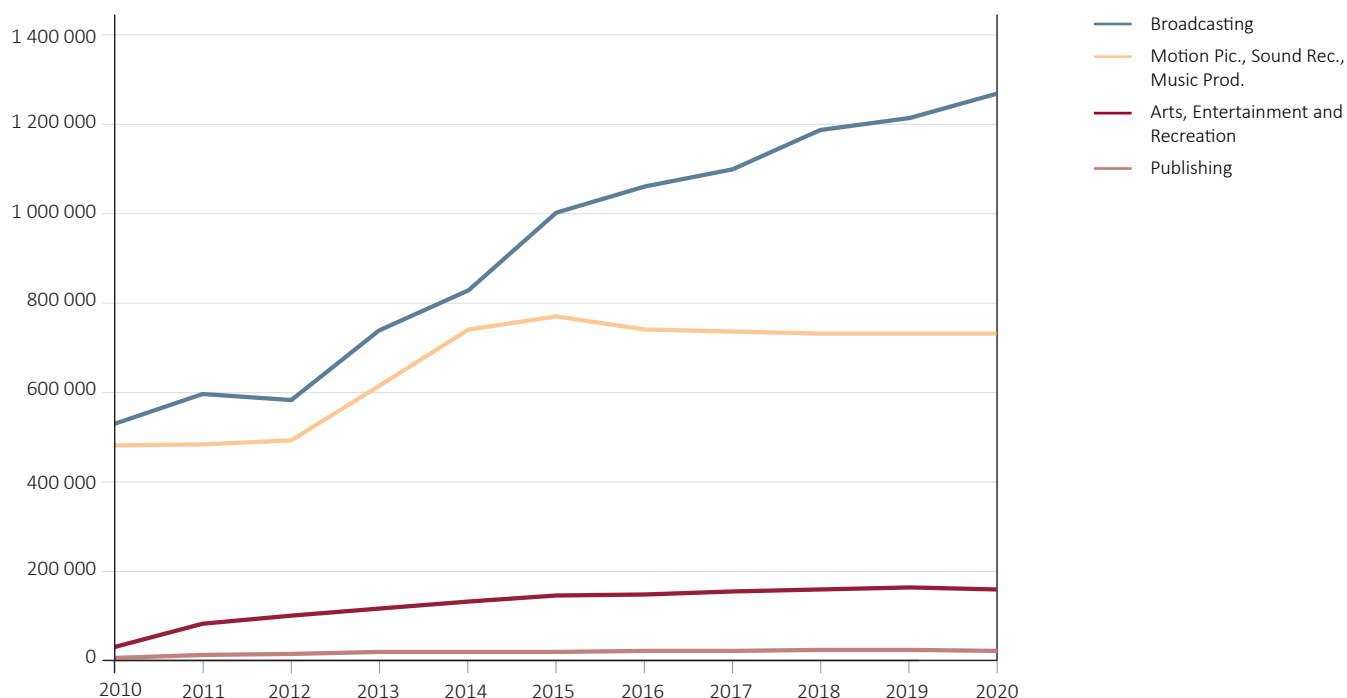
G.03 Real GDP development trends in sectors related to creative industries in constant NGN million 2010-2020. Source: NBS data.

Among those sub-sectors of the creative industries which are more clearly delineated in the traditional grouping of economic sectors, broadcasting, and motion pictures, sound recording and music production are the most visible, with broadcasting on the rise since one decade (doubled), and motion pictures, sound recording and music production stagnating since 2014.

Arts, entertainment and recreation has increased also by a two-fold between 2011 and 2020, however, from and at a very low level. Publishing GDP at an even lower level has increased by a 1.55-fold between 2011 and 2020.

Demographic Development

Nigeria's working age population (15-64 years) stands at 111 million persons and will reach 243 million by the middle of the century based on current medium variant population growth estimates. Until the end of the current decade, an average of 3 million youth per year are expected to enter the working age population. By the middle of the century, this number will increase to 5.5 million per year.[5]
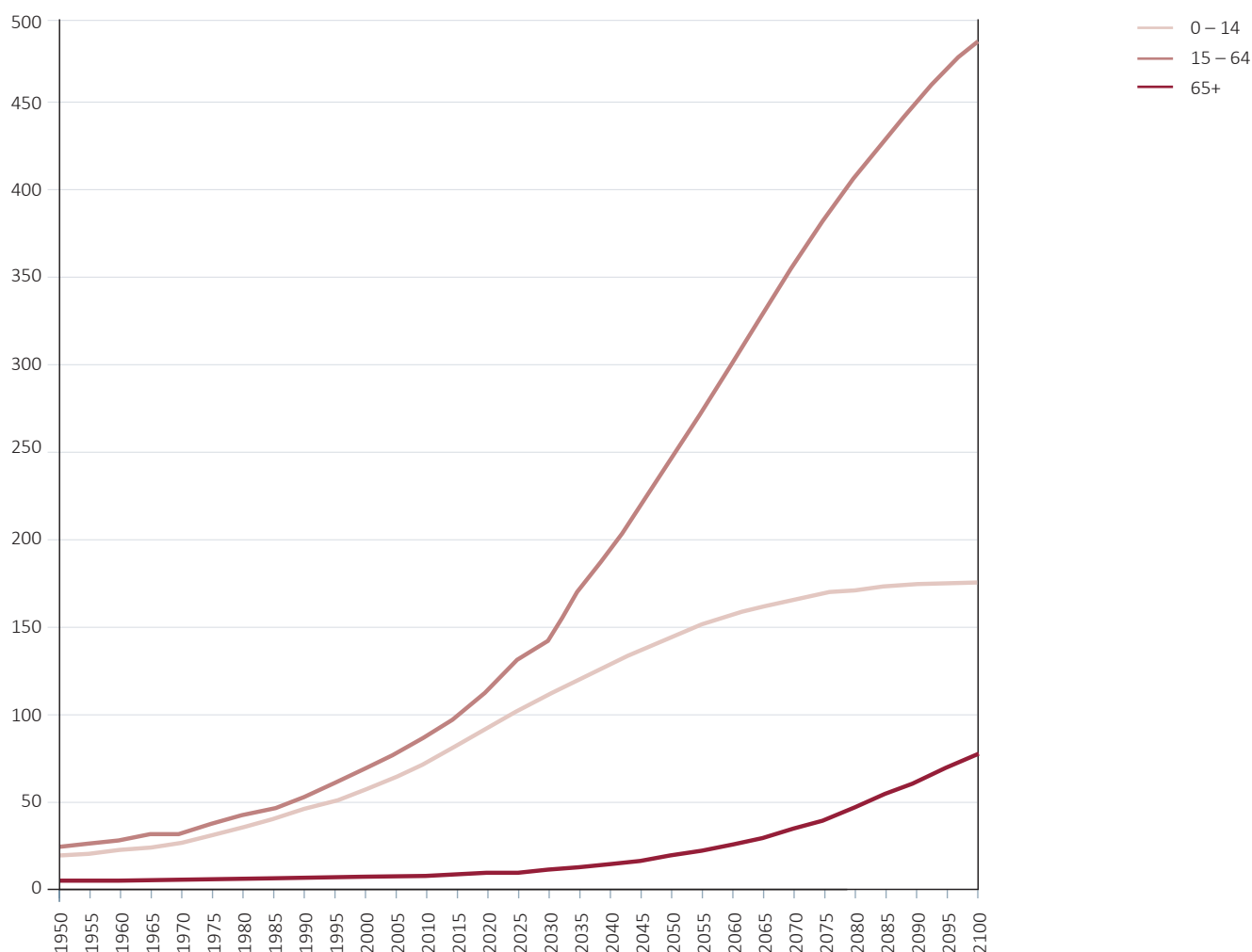
G.04 Demographic projections, medium fertility variant, in millions of persons by age groups.
Source: Own calculations based on UN DESA WPP 2019 [retr. 2021-Aug].

Entering working age and entering the labour force, of course, are not identical. But the growth of the working age population is an important factor contributing to unrelenting pressure in the labour market for the years to come. Current pressure on the labour market is even higher than working age population growth indicates. In 2018, more than 5 million persons are estimated to have entered Nigeria's labour market.[6]

[5]Own calculations based on UN DESA WPP 2019.
[6]World Bank 2019: 8-9.

Labour Migration

The creative industries are typically developed in urban areas, with Lagos a major driver for the Nigerian creative economy and other cities from Abuja to Port Harcourt, Benin City, and Kano playing an important role in creative industries development, resulting in labour migration to these cities. However, this does not mean creative industries are a uniquely urban phenomena, and they do play a significant role in providing employment across rural Nigeria. However, there is little data in such areas and the sector's informal structure makes the measurement of growth and impact challenging.

Rural household heads (those with less than primary education) record the highest poverty headcount rates (66.2%) and when segmented by income-generating activity, the largest poverty headcount is recorded for persons with income from agriculture only (58.8%) and those which rely on diversified income sources (46.9%)[7] - the latter being a typical income generating model also prevalent in creative industries. At aggregate levels, female household heads across the board record lower poverty headcount rates than male household heads,[8] and poverty headcount rates increase with family size.[9]

Outside of rural to urban migration, there has been a rise in emigration outside of Nigeria given the challenges of the Nigerian economy, rising inflation, devaluation of the Naira, the fall in oil revenues and the political instability have led to Nigerians leaving the country in search of greener pastures. In most cases, the formal migration occurs for highly skilled Nigerians to the United Kingdom, the United States, Australia and Canada, although illegal migration also takes place for those who do not have the requisite skills or funding to access the appropriate channels.

Income distribution as a limiting factor

Nigeria's most important constraint to growth is most likely to be poverty respectively inequality or income distribution. With a very large population, domestic demand alone should generally be able to power the economy. However, 40.1% of the population or 82.9 million persons (2019) are estimated to live below the national poverty line of NGR 137,430 per year (ca. USD 382, amounting to current USD 1.05 per day), with rural dwellers (52.1%) more affected than urban dwellers (18%).[10] The national poverty line is significantly lower than the rule-of-thumb type international poverty rate of 1.90 USD per day,[11] implying a significantly higher number of the population living in extreme poverty if compared by that standard, a number, moreover, estimated to continue to rise.[12] At a per capita GNI of USD 2,000 (2020),[13] Nigeria has become the country in the world with the largest number of people living in extreme poverty.

General factors affecting the business environment

*The Nigeri*an GDP grew by 3.11% in Q1 2022, with a real GDP of NGN 17.35 trillion[14]. At the business level, formal sector enterprises in Nigeria are identifying access to finance, electricity, and corruption as the key challenges they are facing in running their businesses. Compared to the average of other countries in Sub-Saharan Africa, these three and transportation problems are mentioned more frequently. In 2020[15], Nigeria ranked 131 out of 190 economies on the global ease of doing business rankings, up from 145th position in 2019. This is due to the its concerted efforts to simplify the bureaucratic regulatory requirements and processes involved with business in Nigeria, e.g. the export action plan to ensure agricultural produce can move through the ports faster, the national action plan by the Presidential Enabling

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[7]NBS, ibid.: 8.

[8]Ibid.: 21.

[9]Ibid.: 22.

[10]NBS 2020: 5-6. Based on the Nigeria Living Standards Survey, 2018-19, with estimates excluding Borno state where the security situation impeded data collection.

[11]An equivalent of current USD 2.2 in the meantime.

[12]Crespo Cuaresma et al. 2018: 3.

[13]Equivalent to GNI per capita of 4.739.7 constant 2017 international PPP dollars and GDP per capita of 2,097.1 in current USD. The country is classified lower middle-income level for World Bank lending.

[14]NBS 2022. Nigerian Gross Domestic Product Report Q1 2022.

[15]World Bank 2020. Doing Business Nigeria. https://www.doingbusiness.org/content/dam/doingBusiness/country/n/nigeria/NGA.pdf

Business Environment Council, which were set up to ensure the achievement of the targets in the National Development Plan 2021 – 2025 which has a target of about 85% private-sector investment[16].

Small and medium enterprises (here: 1-99 employees) mention access to finance and electricity 2-3 times more often than corruption. Large enterprises (here: 100+ employees) mention electricity 3-4 times as often as access to finance and corruption. Enterprises count more than 30 power outages per month leading to an estimated loss of 11% of sales. Most of the enterprises are operating as sole proprietorships.[17] The share of firms using their own websites and using email to communicate with customers/ clients and suppliers is below the Sub-Saharan average.[18]

Cost of corruption and crime are above average compared to the Sub-Saharan average. Both corruption and crime are notorious subjects in Nigeria. Formal firms estimate the security costs they incur because of crime to correspond to over 4% of the value of sales and their losses due to theft, robbery, vandalism and arson to correspond to 1-2% of sales. 40% of enterprises expect to be asked gifts for an import license, over 25% expect to be asked for gifts to secure a government contract or in meetings with taxation officials, and over 20% to obtain operating licenses and construction permits.[19]

Crime levels pose a deterrent to many foreign investors, and piracy levels in the Gulf of Guinea have been a serious nuisance in trading for decades. Crime is a significant obstacle for developing tourism, a sector that would source significant amounts of supplies in goods and services from the creative industries.[20] Some violence is exacerbated by fragile structures for maintaining law and order, leading to vigilante groups taking the law into their own hands where government law enforcement fails or is not capable to provide security timely to affected citizens.[21] The Covid-19 pandemic has aggravated pre-existing security challenges.[22]

Employment Prospects in MSME (including informal economy)

Nigeria's high population growth, weak government and infrastructural deficiencies contribute to a high level of unemployment and underemployment. According to the NBS[23], unemployment rose from 27.1% in 2020 to 33% in 2021, some of which was due to the Covid-19 pandemic. Over 60% of Nigeria' working age population is under 34 years old. Unemployment for 16-24 was 53.4% and 37.2% for those aged between 25 and 34. The unemployment rate (those working less than 20 hours a week or seeking work) for women (35.2%) is slightly higher than that for men (31.8%). Underemployment (those working between 20 and 40 hours a week or seeking work) is reported at 22.8% as at Q4, 2020.

There is a large and generally acknowledged informal economy in Nigeria, the share of which in GDP has been estimated at 41%.[24] In sub-sectors relevant for the creative industries, these shares varied between 98% informal for motion pictures, sound recording, and music and 100% formal for broadcasting.[25] Which businesses are wholly informal, and which formal economy businesses manage to keep a foot in the informal economy may need to be explored. There are several reasons for this comparatively large share of informal actors, these include, lack of education, lack of loyalty to governmental entities, and wishes to evade any costs associated with diverse legal and regulatory duties or requirements (e.g., health, safety, environment, taxation) and/ or outdated or complicated legislation and procedures ("red tape"), lack of enforcement, as well as practices of bribery.[26]

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[16]https://www.premiumtimesng.com/business/510330-ease-of-doing-business-nigeria-sets-60-day-plan-after-agencies-failed-six-times.html

[17]This is actually typical around the world and nothing unusual, albeit being ignored in "doing business" indicators.

[18]World Bank / IFC 2014.

[19]World Bank / IFC 2014.

[20]Crime has effectively influenced the practices in the creative industry sub-sector of architecture. Cf. Agbola 1997.

[21]Crime is significantly underreported, however, there are ample studies available highlighting its "endemic" character in the country. Cf. *inter alia* Ujah and Eboh 2006. For a recent study of selected non-state armed groups cf. Felbab-Brown 2021.

[22]World Bank 2021: 10-11.

[23]NBS 2021

[24]NBS 2016, based on specific sector estimates. Medina et al. 2017: 30 arrived at an overall share of 65% for Nigeria based on multiple-indicator-multiple-cause modeling, including night light intensity.

[25]NBS 2016. Interlocutors at the FMLE see a need for the creative industry needs to be formalized because of its overall contribution to GDP.

[26]According to a recent research reported on by Ojekunle 2021, however, 98% of Nigerians in the informal sector do pay some forms or taxes. (This is not unusual even in other countries).

The relationship between government and creative industries can even be tricky in high-income countries particularly for artists who often require a high degree of freedom to focus, and may shy away from being overly embraced by both formal government and formal private sector stakeholders.[27] This is a reason why intermediaries such as curators and agents often play an important role in bridging the gaps between the „real" creatives and other stakeholders (consumers, producers) in the markets for creative industries. In other words, a certain degree of informality may possibly be useful to encourage development in specific creative industry sub-sectors.

The most recent and exceptional impact on employers and employees in Nigeria, as elsewhere in the world, results from the Covid-19 pandemic. While Nigeria was the first country in Sub-Saharan Africa to identify a Covid-19 infection and also the first one to implement comprehensive measures for mitigating against the pandemic, including an economic sustainability plan which includes creative industries under priority areas,[28] the country has not been left unscathed.[29] Due to the economy's strong dependence on petroleum exports, Nigeria suffered what has been labelled „twin shocks", one as a result of the direct impact of the pandemic on production and income generation in Nigeria and the other as a result of a steep decline in oil prices attributable to uncertainties relating to world market demand as a result of the Covid-19 pandemic and respective pricing strategies of major suppliers. These shocks have increased extreme poverty while on the other hand also slightly altered the poverty profile because not only those previously poor have been affected.[30]

As in other countries, many creative industries were non-essential businesses and forced into lockdown. In Nigeria, research has revealed that while the national unemployment rate surged from 27% to 33% between Q2 2020 and Q4 2020, 62% of informal businesses maintained their staff strength whereas only 56% of formal businesses did.[31] However, there are indications that poor households eventually increased their labour supply as a coping strategy during the pandemic to offset loss of purchasing power, including household members moving out of education into work.[32]

According to lockdown simulations for Nigeria that used assumptions (rough estimates) about the shocks sustained by different sectors,[33] creative arts and entertainment activities, cultural activities, gambling and betting, and recreation activities were assumed to bear shocks of-40% nationwide due to the banning of sports and other entertainment activities. The same assumption (-40%) was made for motion picture, video, and television program production and-20% for clothing manufacturing as a result of the closure of non-essential businesses in selected cities and states. On the other hand, despite being classified as non-essential, no shocks (0%) were assumed for publishing, broadcasting and computer programming. Therefore, the shocks sustained are likely to have diverged between the different sub-sectors of the creative industries- which is plausible.[34]

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[27]Cf. *inter alia* Lange 2011.
[28]Government of Nigeria 2020: 52, 55-56, 71 (i.e., tracks 2 and 3 and Digital Switch Over Programme).
[29]For good overviews cf. UNDP and NBS 2021, World Bank and NBS 2021, and Human Rights Watch 2021.
[30]World Bank and NBS 2021.
[31]UNDP and NBS 2021: 45.
[32]World Bank 2021: 41, 46.
[33]Andam et al. 2020, Table A1.
[34]HEVA Fund 2020: 46-49 also estimated different "exposures" to the pandemic for different creative industries sub-sectors, implying different impacts, for Kenya.

3. ECOLOGY OF THE CREATIVE INDUSTRIES AND INTRODUCTION TO SUB-SECTORS

3.1 Relevant actors (regulatory framework for business)

The bodies responsible for policy and implementation in the creative industries in Nigeria are listed in the table below:

Regulatory Agencies	Function
The Federal Ministry of Information and Culture	The Federal outfit responsible for the dissemination of essential and vital information which will enhance and facilitate democratic governance of Nigeria as a Federal Republic.
Nigerian Copyright Commission	The Nigerian Copyright Commission was set up via the Nigerian Copyright Act of 1992 and 1999 as amended. The core objective of the commission is to engender efficiency in service delivery and to also provide needed support to all players in the Nigerian cultural and creative industry sector. Their activities include legislative support, capacity building, advisory services, and enforcement.
The National Film and Video Censors Board	The National Film and Video Censors Board was set up in 1993 to regulate the Nigerian film and video industry. The principal activity is to classify all films and videos in Nigeria, whether produced locally or those imported. Such classification aims at helping rid the country of substandard and unclassified movies and films and the registration of all video clubs and outlets all over Nigeria.
The Nigerian Broadcasting Corporation	The Nigerian Broadcasting Corporation was established by Section 1 of the National Broadcasting Commission Act of 2004 with primary responsibility to regulate and control the broadcasting industry in Nigeria. Their vision is to facilitate the development of a broadcasting industry that is sustainable and meets the economic and socio-political aspirations of the citizens of Nigeria.
The National Council for Arts and Culture (NCAC)	The National Council for Arts and Culture (NCAC) was established in 1987 and is responsible for the coordination, development and promotion of the arts and culture in Nigeria. The core objective is to leverage on culture as a foundation to build a Nation that projects the rich cultural diversity.
The Nigerian Tourism Development Corporation (NTDC)	The Nigerian Tourism Development Corporation (NTDC) is the apex tourism agency in Nigeria established via Decree 81 of 1992, now an act of the National Assembly (Laws of the Federal Republic of Nigeria, Cap. 137). Principal responsibility is to make Nigeria a prime tourist destination in Africa and further present tourism as an industry that can contribute immensely to the growth and development of the Nigerian economy.

Regulatory Agencies	Function
The Advertising Practitioners Council of Nigeria (APCON)	The Advertising Practitioners Council of Nigeria (APCON) was established in 1988 and was set up to regulate and control advertising practice in Nigeria. Core vision is to promote responsibility and ethical standards in advertising practice; acts as the conscience of the people and as a watchdog for consumers.
The Architects Registration Council of Nigeria (ARCON)	The Architects Registration Council of Nigeria (ARCON) was established by the Architects Act of July 1969 to determine the standards and skills required by individuals before becoming a member of the profession.
Fashion Designers Association of Nigeria (FADAN)	Developing, promoting and marketing art and fashion culture in Nigeria.
National Institute for Cultural Orientation	Harnessing Culture for National Development.
Nigerian Tourism Development Corporation	Responsible for the overall development of Nigeria's tourism.
The Federation of Tourism Associations of Nigeria (FTAN)	The Umbrella body that represents all the private sector in the tourism industry in Nigeria. The association was established in 1997 by the then Federal Ministry of Commerce and Tourism with a view to have easy liaison with the organized private sector in the tourism and culture sector in Nigeria.
Federal Ministry of Labour and employment	The Federal Ministry of Labour is concerned with relations between workers and employers in the public and private sectors. Their mission is to promote capacity building and provide certificate and diploma awarding courses for workers as well as best practices in the workplace.
Federal Ministry of Education	The Federal Ministry of Education is responsible for education in Nigeria, they are responsible for fostering development of all Nigerian citizens. Their purview includes technical and vocational education and training.

T.05 Relevant actors for the creative industries.
Source: Alakwe 2019 and own compilation.

> **Creative industry challenges identified by the Federal Ministry of Information and Culture**
> - Inadequate funding for stakeholders in terms of accessing new technologies that would promote creative work.
> - Lack of capacity development for stakeholders
> - Lack of exchange programs for creatives
> - High cost of accessing financing as many creatives do not have collateral to access funds in banks.
> - Poor intellectual property management
> - Lack of opportunity for many creatives to be part of the trade-in service initiative as their outputs are still consumed locally
> - Absence of the development of international networks and new markets
> - Poor supply chain due to poor infrastructural networks
> - Limited equipment, transmitters, and spare parts for the advertising and media industry
>
> (Interview)

3.2 Ecology of the creative industries

As with many countries, Nigeria is currently undergoing a creative, digital, and thus economic transformation. The old model – an import-driven economy with a narrow industrial base – is beginning to be challenged by a new model based on self-starting, digitally literate and collaborative entrepreneurs who are generating new content, products and services for local and increasingly international markets. The share this new model is going to carve out for itself in the Nigerian economy is still difficult to predict.

Nigeria, like most African nations, however, has been strongly aware of the cultural factors for development. Therefore, the concept of the creative industries with their particular link to cultural activities finds strong resonance and acceptance. The country is now paying even closer attention to the creative industries because of the recognition of the associated economic contributions to GDP. Their contribution to socio-cultural and sustainable development is also increasingly recognized.

This level of recognition comes because of the interconnection with new media technologies, and potential for the creative industries to be a source of innovation and economic growth. The Nigerian film industry (often referred to as "Nollywood" which may distract from its local origin because it never attempted to imitate Hollywood) is a good example, with the increasing global demand for Nigerian movies due to the number of Nigerians and Africans residing in different parts of the world-- and the availability of technologies to meet this demand.[35] The industry was rated as the third most valuable film industry in the world after generating an estimated NGN 1.7 trillion.[36] This gives a glimpse of the impact of the creative industries on the economy of Nigeria.

Ten different sectors that comprise the Nigerian cultural and creative industry were identified in a pilot study in Lagos. These included home video/ film/ television and radio, performing arts (theatre, festival, carnival, dance, drama, stand-up comedy), music, visual art and animation (photography, painting, graphic design, drawing, sculpture etc,), tourism and hospitality (museums and monuments, cuisine, night clubs, events management etc,), arts and crafts, fashion and design, publishing (literature, book fairs, e-resources etc.), architecture (interior decoration, landscaping etc,), and advertising.[37] Expanding on this, Alakwe proposed a first model to describe Nigeria's cultural and creative industries by structuring them into components.

[35]See also Simon 2021.

[36]Alakwe 2019. That being said, any figures circulated relating the film industry of Nigeria need to be treated with caution because the film industry's mode is mainly informal, and no respective metrics exist. Cf. EWN 2018: 2'20".

[37]British Council 2013: 10.
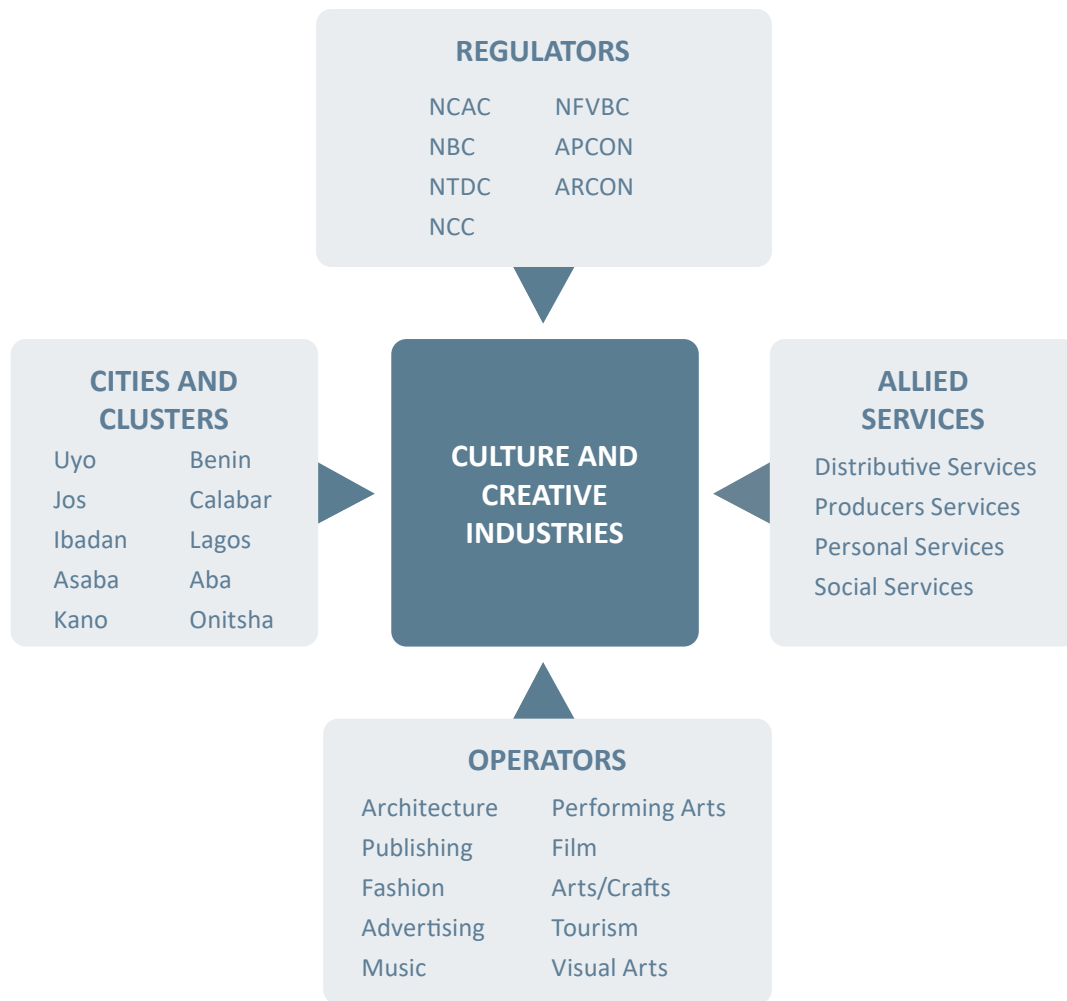
G.06 Components of the Nigerian creative industry.
Source: Alakwe 2019: 28, fig.1.

Alakwe emphasized the need for a localised definition of the creative industries in the Nigerian context given the uniqueness of the industry in Nigeria and the need to take into consideration all the components of the cultural and creative industry. The definition of the cultural and creative industries should therefore incorporate four essential elements: the producers, the regulators, creative cities and clusters, and those industries that offer allied support services.

This very much is in line with holistic views of the creative industries and effectively broader in scope than an employment and labour related study which focuses on the employment and labour market. Based on its

limitations, this study primarily deals with operators (producers), allied services, and regulators with a focus on operators in fashion and the publishing activity of gaming. In this context, however, it cannot ignore references to cities and clusters. Alternatively, cities and clusters could be understood as representing framework conditions in the three-pillar terminology.

There is also the possibility for rural Nigeria to play an active part and potentially become a key driver in the nation's creative economy. Many urban creatives came from rural areas and can operate as role models for their rural peers. Yet, to kickstart creative industries development in rural Nigeria, there is a need to map and

identify players across the value chain in the key sectors of focus. This can foreground targeted approaches which may include enhancing entrepreneurship and management skills; building value chain relationships with urban areas; driving innovation in traditional sectors such as crafts and textiles, and providing platforms for contemporary rural narratives to develop, e.g., in literature, film, gaming and sectors which can tell the distinctively Nigerian rural stories as part of a growing portfolio of Nigerian creative content. Currently, the creative industry market output from rural areas is bound to still be limited.[38]

Including the sector of tourism in the creative industries is debatable.[39] Tourism may usually draw on inputs from the creative industries (creative industries are suppliers), but it is a much broader industry that many countries construct their own satellite accounts to be able to measure the employment created on the foundation of its core hospitality activities. While tourists may be attracted by creative industry outputs, they usually come for a variety of and often a combination reasons. Though tourism, based on security concerns, is not highly developed in Nigeria, including the tourism sector among the creative industries risks conflating figures and may reduce the informational value of any creative industry statistics.

3.3 National policies and strategies for the creative industries

The following key polices for the creative industries were identified:

- The Central Bank Nigeria (CBN), in collaboration with the Bankers' Committee, as part of efforts to boost job creation in Nigeria, particularly among the youth, introduced the Creative Industry Financing Initiative (CIFI) in 2020 with a view to improving access to long term low-cost financing by entrepreneurs and investors in the Nigerian creative and information technology (IT) sub-sectors.

- In 2013, the Federal Government, in collaboration with the British Council mandated the Society of Nigerian Theatre Artists (SONTA), the National Bureau of Statistics (NBS) and the Pan-Atlantic University Lagos to conduct a pilot mapping of the creative industries in Nigeria (using Lagos State, South-West Nigeria, and the creative subsectors film, fashion and music as the core sample). The creative industries mapping study, (additionally supported by NEXIM bank) was the catalyst behind the Nollyfund launched by Bank of Industry (BOI).

- The Advertising Practitioners Council of Nigeria (APCON) in a bid to reform the advertising industry, introduced a code of conduct called the Advertising Industry Standard of Practice (AISOP) to encourage professional practitioner behaviour and provided examples on international best practices for the Nigerian integrated marketing and communications sector.

- The government gave the various federal institutions the mandate to promote the diversification of the Nigerian economy and develop sectors such as the creative industries, and to provide services in support of non-oil exports, in 2011. In 2012, NEXIM bank worked with the Nigerian Film Corporation (NFC) and co-sponsored a delegation to the 65th edition of Cannes International Film Festival, to seek co-financing/ co-production opportunities in support of the Nigerian motion picture industry.

- A creative arts and entertainment loan facility was launched by the Nigerian Export-Import Bank (NEXIM) for the development of film distribution/ screening infrastructure. As a result, Silverbird Cinemas, Filmhouse Cinemas, and Genesis Deluxe Cinema have built new cinemas as part of expansion plans across cities across Nigeria, largely with investments from the BOI Nollyfund.

- The BOI started financing creative industries projects in 2011, focusing initially on film. The investment and sectors supported have grown since then. According to BOI's impact scorecard of 2020, BOI provided NGN 8.6 billion in loans to 117 enterprises in the sector, which enabled the creation of over 38,100 jobs directly and indirectly.

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[38]Integration of rural areas in the creative economy can significantly be boosted by expanding internet access to rural areas, as China has demonstrated. In combination with a choice of different platforms, rural dwellers in China now have plenty of options to upload their contents and show off their regional traditions and practices, including culinary, to the whole country and even enter global platforms and earn income from platform advertising revenues. This points to the importance of the digitalization drive.

[39]Tourism is proposed in the first model for Nigeria as mentioned above and, for example, also included in Jobberman's estimates. Cf. Jobberman Nigeria 2021a and 2021b.

- There is no final approval on the review of the copyright laws, however, there have been plans and advocacy for its review and implementation to fight piracy and the theft of intellectual property. In 2016, at the "redefining Nollywood strategy" the Federal Government through the Ministry of Information and Culture also set into course the establishment of the National Endowment Fund for the art sector to bolster funding challenges.

- In January 2022, the Federal Government launched a USD 500 million support fund aimed at boosting productivity in the creative sector, the intervention fund is aimed at supporting Nigerian youths in

different sectors and is being put together by a group of financial institutions led by the African Development Bank, Federal Government of Nigeria, the Islamic development bank and the French development agency.

- The pioneer status incentive was established in 2017 by the Federal Government of Nigeria, this includes including the creative sector on the pioneer status list in which a tax holiday is given to this sector for an initial period of three years which is then renewable for another one or two additional years.

3.4 Digital transformation as a cross-cutting factor in Nigeria's creative industries

Digital technology has become an essential tool in the production and distribution of creative content, and, as such, creative careers will become even more relevant to young digitally literate entrepreneurs. Digital technologies are forecast to be a major driver of productivity, with successful economies depending on greater numbers of digitally skilled workers. As a result of the changes in production and employment needs, the labour supply will need to adjust to meet demand.

The Nigerian Federal Government has a target of 95% digital literacy by the year 2030. 46% of work activities in Nigeria are susceptible to automation, and digital skills will be increasingly required for jobs including those in more traditional sectors. These digital skills are expected to empower youths to thrive in emerging sectors, participate in the gig economy, online job marketplaces and support entrepreneurial development.

In other words, beyond equipping youths with, for example, fashion skills, there is a need to equip them with enhanced digital skills to be able to access larger markets and take advantage of the technological advancements in the fashion industry, and even if only to be able to keep up with the demand in ultra-fast shopping. It also requires provision of information

and communication technology (ICT) infrastructure and internet access, online platforms for community engagement, marketplaces for online freelancing and microwork platforms as well as access to operations management to provide structure and business processes for effective operations. The challenge, however, is the informal nature of the activities in the industry. For example, about 60% of the fashion industry in Nigeria operates within the informal economy.

One option to address the challenge could be the provision of affordable production hubs and workspaces considering Nigeria's challenges for affordable and regular power supply, and internet connection. These usually are costly, however. Improved city planning and cluster management may be another appropriate method for solving the issues closely related to or involving provision of infrastructure. In addition, the development of creative hubs is not a feasible option for many creative entrepreneurs given the impact of traffic on urban mobility. For example, in Lagos, it can take several hours to cross the city, so for any creative hub to be impactful, it would need to be close to where creative entrepreneurs live or be situated outside of Lagos to address rural to urban migration, infrastructural pressures. However, this will require creative ecosystems to be developed, which in many cases need to be allowed a certain measure of organic evolution.

3.5 Encouraging developments identified

The above-mentioned increase in strategic attention to the Nigerian creative industries is influenced by a global policy dialogue where the creative industries are recognized as a source of growth and driver of innovation. In Nigeria, as a youthful country with increasing digital literacy and connectivity, cultural diversity and a heritage of distinctive story-telling and creative practice, the creative industries are seen as a sector offering enormous potential:

- **Growth:** The Nigerian creative industries have shown some of the highest growth in the world. On the basis of weak data sets, the sector was estimated to grow over 12% a year to 2021.[40] British Council's mapping of Lagos' creative industries in 2013 found that film, fashion, and music sub-sectors joint GVA rose by 40% (CAGR)[41] between 2010 and 2012.[42] Nigerian entertainment and media spending was estimated at USD 4.47 billion in 2018 and forecasted to reach 9.45 billion by 2022 and 10.80 by 2023 (CAGR of 21.5%), mainly attributable to growth in the internet segment (CAGR 23.4%), and followed by video games (21.4%).[43]

- **Innovation and convergence:** The accelerating digital shift is driving innovation and growth and facilitating the development of distinctively Nigerian business models. Nigeria's entertainment and media growth over the last years has been tremendously fuelled by the expanding access to internet and will enable the country to increasingly capture the opportunities created by digitalisation.[44] Internet expansion is going to be a key driver in the years to come and then will increasingly yield to online services and innovations that are internet based.

- **Scale:** The Nigerian creative industries include some major success stories, of which those in film and music are most well-known. The Nigerian film industry is estimated by some to be the second largest film industry globally by volume, with at least 1,000 releases per year (some sources suggest even up to 2,600 releases per year). The film industry allegedly generates USD 600 million and is said to employ more than 1 million people.[45] The music industry has shown rapid growth with revenues projected to hit USD 86 million in 2021, making it Africa's largest.[46] Digital music consumption contributed the largest portion of the revenue.

- **Diversification:** Nigeria is witnessing an upsurge in digital start-ups, with some evidence of scalability. Nigeria exhibits a growing games and animation sector, with a proliferation of short-form content creators, gamers and software developers. This is particularly pronounced in metropolitan areas where access to digital connectivity, talent and support is most abundant.

- **Distinctiveness:** Underpinning the growth, innovation and future scalability of the creative industries is Nigeria's rich, deep and diverse cultural heritage, with many ethnicities bringing a compelling portfolio of aesthetics, traditions, and cultural narratives. Though notions of national identity are deeply contested, Nigeria's major strength is the diversity, imagination, resourcefulness and innovation of its people. This is evident in the nation's crafts and textiles sector, which informs contemporary approaches to fashion and design. It is apparent in the country's oral traditions and approaches to story-telling, which shape the contemporary literature, film and music sectors. And it is evident in the energy and vitality of all media, which is becoming increasingly prevalent in digital content industries such as gaming.

- **Sustainable Development:** Most creative industries employment is in small business, including freelancers. Although Nigeria has some larger creative firms (especially in film and digital), the majority of the creative workforce focuses on localised production for local markets. This is both a strength and a challenge. It is a strength because the creative industries are powered by a labour force with low entry costs and limited environmental impact. It is a challenge because many creative enterprises

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[40]According to the national accounts for Q1 2017, the entertainment industry grew by 12%. However, this is from a very low base as the sector accounts for just 0.3% of total GDP.
[41]Own calculation based on British Council 2013: 33.
[42]British Council 2013: 33.
[43]PwC 2019: 22-23.
[44]PwC Entertainment and Media Outlook reports, various years. On the quality of these outlooks cf. Annex 7.
[45]Moudio 2013, Simmonds 2019.
[46]Oyeyemi 2020.

work at such a micro scale that access to capital and investment is out of reach and thus opportunities for growth and innovation are limited. The frequent precariousness of creative work often makes it more challenging for females to build a career in these industries. However, in general terms, the Nigerian creative industries are a story of resilience, and many creative careers are contributing to an inclusive, sustainable economy.

- **Dynamism:** Nigeria, as a youthful, culturally rich and rapidly urbanising society, is a hotbed for creative expression, digital innovation and increasingly confident and globally facing content development. Nigerian music, fashion, theatre and other creative industries are on a growth path, all featured in burgeoning media and entertainment platforms and showcased in the flourishing entertainment and festival sector. From Lagos Fashion and Design Week to Ake Arts and Book Festival, Nigeria is finding its creative voice. Powered by the cities, in particular the megacity of Lagos, Nigeria has a creative energy, drive and critical mass unparalleled on the continent. Nigerian creative talent is playing an increasingly visible and influential role in the global marketplace, with a new roster of films, books, sounds and styles beginning to break through into established markets such as the USA and Europe. The Nigerian diaspora is a critical enabler for this increasing global mobility and reach.

- **Ambition:** An openness to global trends and a huge pride in Nigeria's growing stature as a creative nation. This is most evident in a new generation of creative entrepreneurs who are beginning to collaborate, to share and to cluster, recognizing that it is through knowledge exchange that ideas flourish and consistently excellent skills develop. Given the increasing stature of the creative industries as a potential success story where other sectors have failed before, an opportunity exists to build a strong domestic market that indulges in a "Created and made in Naija" ethic. But to fully exploit this opportunity, the creative industries will need to excel in quality and be at least as good as foreign imports. This is likely to be dependent on skills.

4. CREATIVE INDUSTRIES SUB-SECTORS:
FASHION, AND GAMES DEVELOPMENT / ESPORTS

The model provided for TOR in the creative industries (see Annex 8) points to the fact that each creative sub-sector operates on the basis of different market conditions and business models and requires a specific set of skills from various agents in the production process that comprise the value chain through which they are able to produce a range of creative products. General discussions of the creative industries as a whole are likely to miss or obscure many important details that effectively influence labour market and employment outcomes.

Given resource limitations, and the fact that sub-sectors in the creative industries are many, for this study, we have decided to exclude the most well-known sub-sectors of the Nigerian creative industries, film and music, because they have been extensively reported about,[47] and they fall into the category of creative industries where employment opportunities are basedon "winner-takes-all" models (precarious jobs for the vast majority), and because they have already successfully emerged and evolved by themselves. We are rather focusing on two distinctive creative sub-sectors which appear to have room for growth and which, prima facie, present an opportunity to boost youth employment: fashion and gaming.

4.1 Fashion

The **fashion** sub-sector is considered to be part of the core creative industries (see Annex 8, fig. G.50). By extension, **fashion industry** is sometimes understood to be synonymous with the garments and/ or apparel industry (ISIC14; HS61/62) and may also include headgear and footwear shoes and bags or other accessories, especially high-end fashion, and is not part of the creative industries proper. The usually very close linkage between fashion and both **high-end and consumer** fashion industries could contain potential for multiplier effects as far as employment is concerned. The NBS estimates the share of the informal sector in the GDP attributable to manufacturing of textiles, apparel, and footwear to be 28%.[48]

During the second half of the 20th century, fashion design occurred close to major world markets (USA, Europe), dwelling on localized knowledge and trends and the respective purchasing power. Notably, large volume consumer fashion design used to be heavily protected in order to avoid competitors stealing such designs and bringing the respective product earlier to the market than the firms who had drawn up the designs. Following the outsourcing of manufacturing from North America and Europe to developing countries in the 1980s-90s, design sections remained in these markets and became detached from manufacturing. In the meantime, due to the advances in flexible specialization (allowing for smaller lots) and digital communication (allowing for continuous adjustments), competition is now much more fluid, includes direct interaction with consumers, and suppliers bidding for lots over the internet.

In Nigeria, the fashion sub-sector can plug into an extensive and varied pre-existing tradition of textile and garment production. This production has gone through ups and downs even during periods predating industrialized production and tailors have formed the backbone of the industry to this date, moving into trade when they have accumulated resources or working as artisans by themselves, in cooperation, as employers, or as employees when market circumstances so dictated.[49]

For most of the time tailoring was equivalent with design. The separation of tasks comes mainly with the introduction of manufacturing into the process. But artisanal tailors who are capable of delivering the whole process as individuals have not yet disappeared.

The textile and garment industries of Nigeria that flourished during the second half of the last century had to discover that they are not anymore able to compete with foreign imports, notably on cost but also on quality and variety, and have declined with textile production and manufacturing in Nigeria being virtually non-existent. The reasons are multiple[50] and have led to a situation that has been labelled as "comatose",[51] with calls to reactivate this sector which used to be the second largest employer after the civil service during peak times. With the apparent success of the fashion sub-sector of the creative industries and the potential coming out of advertising and trade facilitated by the internet, new opportunities may indeed arise. However, reactivating a sector essentially pronounced as dead will require considerable focus, concerted effort, and stamina. Some of the participants we spoke to, shared their challenges of fabric sourcing, importation and concerns on sustainable fashion, costs and exchange rate volatility which affect pricing. They also shared the lack of a cohesive textile buying/garment production skills development to enable people specialise in that area and prevent the silo-effect that most fashion designers work in, resulting in task duplication, higher costs and slower abilities to deliver.

Attractive fashion design could trigger market demand for the respective apparel and thus contribute to employment generation. This sub-sector could provide job opportunities to young Nigerians with various levels of skills and education, especially if the fashion products designed are produced in Nigeria. They can benefit from the rich heritage and traditions prevailing in the textile and garment sectors and the cultural diversity Nigeria can offer. The fashion sector can also drive value across other creative industries sectors – notably film and music. As such, Nigerian fashion is already growing in profile and reputation via the success of Nigerian-influenced Afro-beats music which is gaining mainstream profile in Europe and North America. Stars such as Olamide, Joeboy, Burna Boy, Davido, Omah Lay, Wizkid, Bella Shmurda, Naira Marley, Tems, Tiwa Savage and many more are showcasing Nigerian fashion and creativity to global audiences.[52]

The Nigerian fashion industry has not only grown in size and sophistication but is also attracting global attention.[53] Euromonitor suggests that Nigeria accounts for USD4.7 billion of the USD 31 billion of the Sub-Saharan Africa fashion market. This, actually, would correspond to merely half of the amount declared by the president of FADAN of more than NGN 2 trillion in the same year, with garments, textiles, and footwear contributing 0.47% to Nigeria's GDP.[54] Projections for growth are favourable given indicators such as the size of the youth population in the fashion industry, the growth of a fashion-conscious youth population, global market demand for Nigerian creative products, and advancements in technology.[55] The Nigerian fashion industry is projected to grow from USD 2,273 million in 2021 to USD 3,610 million in revenue by 2025 with an annual CAGR of 12.25% according to data from Statista. The "textile, apparel, and footwear" sector has averaged (pre-pandemic) growth of 17% since 2010.[56]

At the same time, mirror trade data does not reveal any relevant fashion related product categories (HS 52, 60-65) that achieve a positive balance of trade-- which could indicate a significant degree of competitiveness at the international level. There are only small niche-type exports that are not of a steady nature, and Nigeria remains a net importer in all of these categories.[57] So while the end to growth does not appear to be in sight and maybe never will be in a country with a large and growing population, it will be important to monitor developments and strive to increase competitiveness in combination with improving income distribution in order to enable expansion within the domestic market.

[50]Cf. inter alia Muhammad et al. 2018 and Owen et al. 2016,
[51]Abdulazeez et al. 2021.
[52]Ahttps://guardian.ng/arts-2/audiomack-unveils-top-21-afrobeats-artists-of-2021/
[53]For a well-written recent positioning see Ruth 2021.
[54]Alakwe 2019: 22.
[55]Euromonitor International 2015.
[56]Akinsola 2019, based on NBS GDP data.
[57]Own review of UNCTAD ITC trade data up to 6 digits, 2021-12.

At this time, half of the population of Nigeria is not able to afford fashion products and currently may even be squeezed out of the purchase of second-hand clothing as the knock-on effects of the pandemic have led to rising prices.[58] According to Stears Business, conversations on Nigeria's fashion industry, however, tend to focus on the luxury and mid-market segments,[59] ignoring thousands of value brands that represent a larger proportion of the industry, in terms of revenue, number employed and geographical spread within the country.

Chapter 2 referred to the general business environment as it affects different enterprises in Nigeria. Based on our interviews, we asked businesses what are important challenges to market entry and growth for employment in the fashion sector and put the most frequently mentioned issues to a separate online ranking exercise in order to see how businesses in the fashion sub-sector ranked these more specific challenges in the business environment for their operations.

[58]Vanguard 2021.

[59]This may explain why the share of "tailor" being considered a "dream job" is three times as high in the richest quintile of youth respondents than in the poorest quintile in a national longitudinal phone survey conducted in April 2021. See World Bank and NBS 2021: 45, fig.28.

Challenge	Qualification
Access to equipment (machinery)	**third**-most important item for larger or more upscale brands; fourth-most important item for smaller brands [suggested ways to address challenge by validation workshop participants: lease equipment/ machinery]
Access to finance	**second**-most important item for smaller brands; sixth-most important item for larger or more upscale brands
Access to foreign markets	
Bureaucratic procedures	
Copyright infringement	fifth-most important item for larger or more upscale brands [suggested ways to address challenge by validation workshop participants: Require formal registration (for copyright infringement)]
Digital connectivity	
Digital infrastructure in Nigeria	
Exchange rate fluctuation	fourth-most important item for larger or more upscale brands [suggested ways to address challenge by validation workshop participants: pricing items in foreign currency]
Finding appropriate workspace	**third**-most important item for smaller brands
Finding people with appropriate skills levels	**second**-most important item for larger or more upscale brands [suggested ways to address challenge by validation workshop participants: in-house training]
Import procedures	
Power supply	**most** important item for all businesses [suggested ways to address challenge by validation workshop participants: buy generator/ install inverter]
Regulatory environment	
Water supply	

T.07 Employers' qualified list of general challenges to growth for employment in fashion.
Observation: Alphabetical order.
Source: Validation workshop discussion of online survey results of fashion businesses.

The results of this exercise were presented for debate at the validation workshop, resulting in a number of qualifications that are added to the list above. While all the challenges were relevant, as we knew from the interviews conducted, we have found during the validation workshop that the responses of larger and more upscale brands varied significantly from smaller brands because we were split the groups according to such criteria in order to enable more specific discussions. It is therefore not useful to rank them.

Larger and more upscale brands ranked the following challenges highest: power supply, finding people with appropriate skills levels, and access to equipment (machinery). Smaller brands ranked the following challenges highest: power supply, access to finance, and finding appropriate workspace. All agree on the main constraint. Yet while the more established businesses are able to focus more on skills and technology, those who are smaller need to deal with more basic operational issues first: finance and premises.

The most highly ranked challenge in the validation workshop was power supply, an infrastructural constraint. The challenge of ‚water supply', equally one of physical infrastructure, on the other hand, fell from the first rank in the survey to the last rank, suggesting that the participants in the survey may have had a stronger connection to processes that were more intensive in water consumption (e.g. dyeing, washing) than those who participated in the validation workshop. This shows the limitations that surveys and discussions with smaller samples of convenience pose for the analysis as far as a generalization of the issues discovered is concerned. The advantages of ‚quick-and-dirty' assessments (speed) may easily turn into a disadvantage when those who implement the analysis are unaware of the downsides as far as representativeness of the sample is concerned, no matter whether the sample was interviewed or surveyed.[60]

Despite the ‚fall of water supply' in the ranking, the problem can only be excluded at peril given the importance it may gain in significance with climate change depending on the specific locations.

It is noteworthy that digital topics have not been ranked higher given the trends in the international fashion industry. This is actually also reflected in the rankings of skill-sets that were discussed which focus on much more basic elements that still appear to be lacking (see chapter 5).

Larger and upscale brands rank finding people with appropriate skills levels, the exchange rate of the national currency, and copyright infringements (intellectual property protection) as important.

- The exchange rate plays an important role for those firms that either export products or import inputs (or products if producing abroad) because their competitiveness is influenced by world market prices. The exchange rate, however, is strongly influenced by the petroleum sector which is technically unrelated to fashion and exchange rate fluctuations therefore are not in consonance with the development of the industry. Hedging may be required-- normally a role for the Nigerian financial sector.

- Finding people with appropriate skills is a problem that could be solved directly in Nigeria by improving skills development and/ or matchmaking processes. But the quality of skills available in the labour market appears to suffer from limitations or at least standardization (see chapter 5).

- Copyright infringements have been a challenge to all fashion businesses in the world for centuries and are increasingly difficult to deal with because communication technologies essentially have opened the doors on a worldwide basis, and the problem may be difficult to solve for a single country that is a price taker in international markets. At the same time, the importance of copyright infringements is also a testimony to the success the Nigerian fashion sub-sector is gaining: Good design is attracting copycats.

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[60]In other words, an ELS will always remain a qualitative assessment when it comes to primary information collection. Only where it can draw on data that has already been collected and cleaned, can statistical methods of analysis be meaningfully applied and exploited for accuracy. However, accuracy is not fundamental for an ELS. For one, for practical purposes, it is better to be ‚vaguely right than exactly wrong' in the overall analysis. Secondly, rapid assessments like ELS will always be important for designing programs (which are timebound by definition) and are a necessary first step to find out whether more comprehensive and reliable quantitative research is required to understand the problems which need to be addressed.

4.2 Games development / esports

The **games development / esports** sub-sector is considered to be part of the core creative industries (see Annex 8, fig. G.50). Other than in fashion, in the digital age there remains little of direct extension (linkage) from (now digital) games to a specific manufacturing sector, such as manufacturing of games and toys (ISIC324, HS9504). Digital games development production is classified as software publishing (ISIC5820)[61] and this part of game development thus has significantly changed the structure of the games industry. The NBS estimates the share of the informal sector in the GDP attributable to publishing to be 31%.[62] What used to amount to the selling of specific manufactures (board games, playing cards, specially constructed games-- all physical goods that are subject to rivalry in consumption, even if reusable) has been transformed into quasi-public goods[63] where there is little rivalry in consumption (a factor which makes

digital games particularly attractive for education and training purposes). Given that, technically, exclusion of consumers from playing the digital games is possible, digital games have taken on characteristics of toll goods, like highways where toll fees can be collected at entry or exit points.

Games development is now a sub-sector that could provide job opportunities to young knowledge workers. And its products and services could remain open to low-income gamers (and learners) if price differentiation strategies are being applied. At the same time, esports will focus on competing at the high end, requiring sponsors, e.g. for prize money, so highly talented and skilled gamers may compete. Where the average user in Nigeria will use the mobile phone for play and competition just as the average commuter may use a bicycle or public transport, those competing in esports will use the best equipment available like those who are testing the limits by driving in Formula-E or Formula-1.

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[61]For trade data, software classification including games depends on the media on which it has been recorded and the nature of the software. Relevant categories are HS8523291900, HS8523491000, HS8523492000, and HS95045000. They could, of course, also come with other media and be included under HS8523210000 and HS8523520000. Moreover, they can also not easily be monitored when electronic transmission is used, or transfer occurs using a device that travels with the user. All of this is more difficult to monitor and separate from other uses of the media, or combined uses, and is in continuous evolution. Extensive software piracy, at lower per capita income levels usually the only option for circumventing software denial to the majority of a population, compounds the difficulty of analyzing the respective trade.

Mirror trade data for Nigeria reveals a sharp increase in import values of software that is recorded onto smartcards (e.g., Compact Flash, Smart Media, Secure Digital, Multimedia Card, Memory Stick, XD Picture Card, PC Card or PCMCIA Card) between 2009 and 2016, and continuing relatively strong. While vastly inferior to leading importers, Nigeria is the no.4 importer in Africa behind South Africa, Kenya, and Tunisia (2020). Regarding imports of games for video consoles, Nigeria is the no.5 importer in Sub-Saharan Africa behind South Africa, Côte d'Ivoire, Angola, and Zimbabwe (2020). For consoles run with cartridges, however, Nigeria is only the no.10 importer in Sub-Saharan Africa (2020).

[62]NBS 2016.

[63]In economic analysis, the difference between private and public goods and services is made on the basis of two criteria: Whether there is rivalry in consumption (if one person consumes the product, another cannot consume it) and whether exclusion from usage or consumption is technically feasible (e.g., by limiting access). Only if there is both rivalry in consumption and exclusion is technically feasible, then we are dealing with **private goods and services**. Where there is neither rivalry in consumption nor feasibility of exclusion, we are talking about **public goods and services**. The cases in between these are called **quasi-public goods and services** (common pool goods and services, and toll goods and services). The distinction along these two criteria is a technical distinction that is completely independent of the question who (households, businesses, or government entities) provides these goods and services.

Games are often being associated with gambling because both gaming and gambling can serve entertainment and recreational purposes. By industrial classifications, gambling and betting were and are traditionally classified as a sub-sector under entertainment and recreation (ISIC92) and therefore, statistically speaking, considered closer to creative arts (ISIC90) than modern gaming which, as software publishing like other publishing activities, relates to information and communication or traditional gaming which was booked under manufacturing. While thus far the games and the gambling communities and industries usually remain distinct, there are many areas of overlap, including in social gaming and in games where betting elements are integrated.

The distinction between games and gambling (betting) is important in Nigeria because gambling is considered an offense under sharia law in some of the states of the federation, similar to consumption of alcoholic beverage or prostitution. Gambling may be subject to punishment, at least for individuals of muslim faith. Moreover, the term gaming, other than in international usage where it describes a very broad sector, is understood as to mean gambling in Nigeria.

Though the issue of gambling can be sensitive more generally, and the potential downsides are well understood not only by persons of muslim faith, professional gamers and game designers independent of their faith will accept that games may include elements of ‚gambling', e.g. when unexpected events are triggered by lottery-like mechanisms and/ or gamers effectively are ‚betting' on specific risks they are taking to achieve their objective in the game. This illustrates that games and gambling cannot be treated as entirely separate activities, or at least not without a more detailed specification.

Sports betting, if clearly regulated and monitored, can be a source for tax revenue generation or even directly for funding specific programs of social aid. Despite the growth potential for Nigeria's betting industry, there remain some challenges. According to PwC, regulation is a key problem and there is a need for an overhaul

of the regulatory environment to enhance oversight and improve consistency in enforcement of license generations and payment of levies, development and revenue generation.[64]

There is some lack of trust in the industry, stemming from last-minute cancellations and non-payments of winnings. Providing a safe and secure betting environment to players is important to the continuous success of the Nigerian betting industry. Security of online games/ plays is a growing concern especially with the increasing use of electronic channels for betting.

Efforts will also need to be made to encourage responsible playing of games and preventing addiction. This is recognized in the Nigerian debate, similar to other countries.

The Nigerian games industry experienced rapid growth over the last decade largely due to the growing youth population, increasing internet penetration, access to data-enabled mobile phones and regulations which have contributed to foreign investments and increasing partnerships. The growth of esports and online gambling has also driven significant growth in games development. However, our focus in this study is on activities in games which are less controversial, and which are underpinned by significant creative content development, storytelling and innovation; accepting that it is not easy to clearly separate different types of games and information about the ways creative practitioners in games development may have a portfolio which includes services for gambling as well as for more progressive formats. Although the video games industry in Nigeria is still emerging, an estimated 60 million Nigerians are actively involved in sports betting, generating almost USD 2 billion annually.[65]

According to the Nigerian Communications Commission (NCC), mobile penetration increased from 36% to 50% in the last three years, accorded to increased awareness through aggressive expansion and marketing by operators as well as technological improvements in payment platforms.[66] The demand for software developers in the game industry is rising.

[64]PwC 2016.
[65]Jobberman Nigeria 2021a: 48.
[66]PwC 2017.

Looking at other factors responsible for this growth, news media and PwC report that the need for additional income in the face of the recent economic downturn which increased unemployment and underemployment has contributed to the growing base of gamers – in particular in sports betting and lotteries. Partnerships with banks, telecommunication and payment companies are making games and sports betting more accessible to mobile users.[67]

The Nigerian games sector is an emergent and increasingly dynamic part of the wider creative industries. It is powered by increasing digital penetration, with rapidly increasing digital capacity and reach. Nigeria's games sector generated about NGN 50 billion in 2019.[68] The industry comprises the lottery and betting sector with casinos as major players and the video and mobile games sector. The main focus here is on the mobile games sector.

The two main branches of the games industry contrast in terms of recognition. The betting and lottery sector is regulated by the Government through the National Lottery Regulatory Commission (NLRC) and their equivalent at State level. The NLRC grants 3 different licenses: lottery license, sports betting license, and promotional license. The commission lists 23 licensed lottery companies, 34 licensed sports betting companies, and 34 licensed online interactive gaming/ mobile value-added-services companies.

Bodies	Website	Activities
The Association of Nigerian Bookmakers	http://anb.ng/	Sports betting
Nigeria Gaming Association (NGA)	http://www.nigeraigamingassociation.com/	Sports betting Lottery Virtual Casino
National Lottery Regulatory Commission (NLRC)	https://nlrc-gov.ng/	Sports betting Lottery Virtual Casino
African Gaming League	http://www.africangamingleague.com/	Esports
Extraordinary Gamers	https://lxgonline.mn.co/	Esports

T.08 Relevant actors for games development / esports.
Source: own compilation.

[67]PwC 2016.
[68]Adediran 2021.

The African Gaming League was launched in 2016, for video games and mobile phone games and the league now features in international gaming tournaments. The League of Extraordinary Gamers (LXG) was formed recently comprising players of mobile games. Networks of games companies are still nascent, as befits an emergent industry. However, the sector is becoming increasingly formalised and networked. For example, the Lagos Esports Forum[69] works to build the profile of the sector, support its validation as a sector with high growth potential, and facilitate knowledge exchange between enterprises which are micro and fragile. This is boosting the profile of games as both a leisure activity and creative industry. There is latent potential for the industry because, in about five years, bodies such as the African Gaming League have managed to break into the global video gaming tournaments. The presence of establishments like Kucheza Gaming[70] presents young Nigerians with the opportunity to compete in the growing world of esports. While this is still new, it has the potential to generate recognizeable value added and become source of employment, similar to sports.

The main catalyst for growth in this industry (both in Nigeria and globally) is the rise of the smartphone. Today, playing mobile games eclipses video games. The mobile games sector is growing at an unprecedented rate and the global mobile games market was worth USD 98 billion in 2020.[71] In Nigeria, the games industry is effectively a mobile games sector. The country did not experience the computer games boom of the 1980s-2000s, when many other countries, notably in North America, Europe and East Asia, were experiencing a boom in games played on personal computers or via consoles.[72] In the meantime, the smartphone is

the great 'democratizer' or equalizer in global game playing, like for many other interactive leisure and communications uses. In 2016, mobile internet user penetration (i.e., smartphone use) stood at 21% in Nigeria. As of 2021, the number of mobile internet users in Nigeria amounted to over 101.7 million, 48% are active mobile internet users, a number three times higher than the African average.[73]

Nigeria has the largest number of active mobile broadband subscriptions (85,941,222 in 2020) in Africa and is ranked tenth on a worldwide scale of the most mobile data in the world. One third of the (individuals in the) population is estimated to have access to the internet. 32% of the female and 49% of the male population own a mobile phone (2017). The network covers 91% of the population by mobile-cellular network, 74% at least by 3G, and 41% at least by 4G (2020). Only 6% of households have a computer at home (2018). In urban areas, 18% of households have internet access at home, in rural areas, 2% have (2017).[74]

The proportion of mobile data to other kinds of internet connections demonstrates significant growth. This is due to rising smartphone use and the fact that most users have devices with more than one SIM card (often to be able to switch networks in cases where network coverage is deficient, and connectivity is weak). The vast majority of consumers use mobile data for social media, half as many to look for information and check their email, and less than a third as many to watch online videos. The proportion of consumers who play mobile games is relatively small. However, these are the most active smartphone users.

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[69]https://thelesf.com/

[70]Kucheza Gaming provides esports experiences to 6-18 year olds through a network of leagues, school collegiate system, industry involvement and computing curriculum. "Together we can bridge the learning gap and equip the next generation of Africans through play". See: www.kuchezagaming.com

[71]https://www.businesswire.com/news/home/20210625005180/en/Global-Mobile-Gaming-Market-Report-202-Worth-98-Billion-in-2020-the-Mobile-Gaming-Market-is-Forecast-to-Grow-to-272-Billion-by-2030---ResearchAndMarkets.com [2021-06-25, retr. 2021-12-28]

[72]This applies to many countries in sub-Saharan Africa. The ups and downs in these earlier electronic or computer games are well-known to those who have experienced them, and also have been increasingly documented as they are becoming 'history'. With the continuing evolution of technology, it is likely that we may witness further changes triggered by competition that are difficult to anticipate, let alone predict.

[73]https://www.statista.com/statistics/972900/internet-user-reach-nigeria/ [2021-07/ 2021-08-24, retr. 2021-12-28]

[74]https://www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx [data retr. 2021-12-28]

NIGERIA MOBILE GAMERS PROFILE

39%   61%

NUMBER ONE

SOCIAL NETWORK	SEARCH ENGINE	BROWSER
FACEBOOK	GOOGLE	OPERA
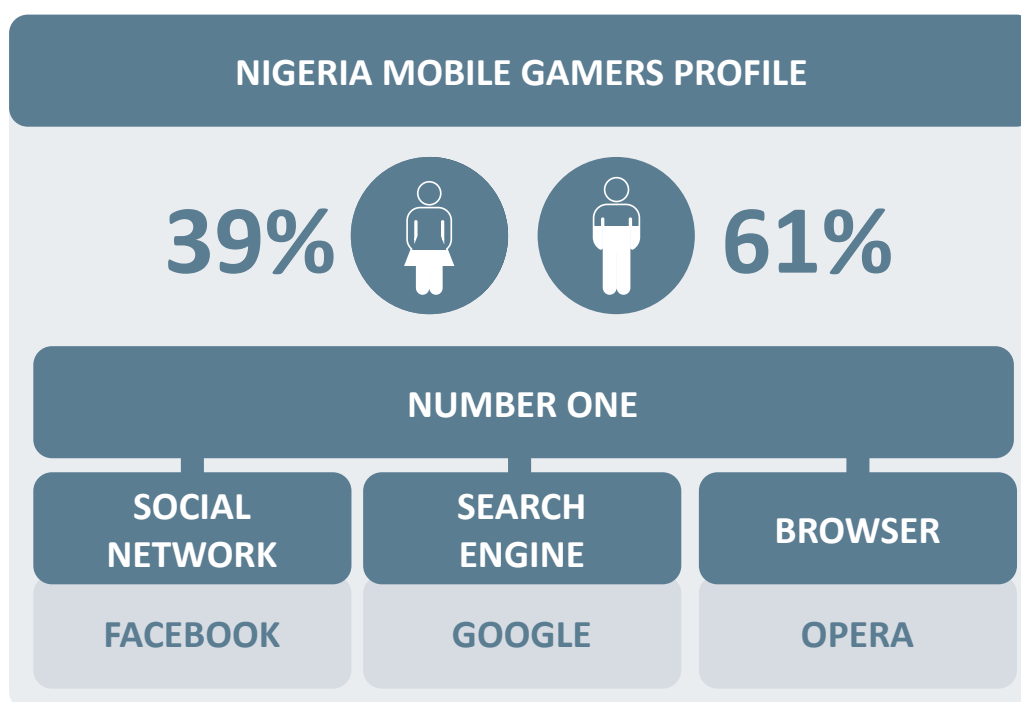
G.09 Nigeria mobile gamers profile.
Source: https://allcorrectgames.com/insights/mobile-game-market-index/nigeria/ [retr. 2021-12-21].

In terms of consumer behaviour in the Nigerian mobile games sector, approximately 50% of users have paid for apps or games at least once and 42% of them have paid for more than one game or app. The segment that pays the most is gamers aged 25-34. Most payments are made in the first few days after an application is installed.

As far as challenges are concerned, the price point customers are willing to reach for mobile games has declined significantly over the last decade. The price point in lower income countries, especially those where mobile banking is still in its infancy (such as Nigeria), can be very low. Moreover, the rise of freemium models within app purchases makes it even more difficult for games developers to gain revenue. A further challenge is the rapid obsolescence of smart phones.

Although Nigeria has a large and growing smart phone user-base, many smart phones are relatively old and not compatible with the software being used for new applications and games. According to Jumia, the top selling mobile brands are Infinix, Fero, Samsung, Nokia and Tecno. Accessibility to smartphones have been made easier as result of the influx of Asian brands specifically targeted at Nigerian market.

In 2022, 37.3% of the Nigerian population accessed the internet via mobile device. This share is projected to grow to 48% by 2076. In 2021, the number of mobile internet users in Nigeria came to over 80.93 million. (Statista, 2022). The market share of the best-selling brands in Nigeria from January to March 2022 are as follows.[75]

[75]Source: Statista 2022.

Shares	Tecno	Infinix	Samsung	Apple	Itel	Huawei	Xiaomi	Nokia	other
March 2022	28%	24%	11%	9%	6%	3%	3%	2%	15%

The most popular uses of smartphones nowadays among Nigerians beyond functionality and communicating is playing games. A study produced by the games analytics firm Newzoo found that the number of gamers in sub-Saharan Africa had grown from 77 million in 2015, to 186 million as of 2021. Smartphone games have come a long way since their earliest iterations, and now gamers on Android and iOS have access to a huge range of diverse titles. From slots games, to console-quality titles such as Genshin Impact. This creates a potentially large market for the games development / esports industries and if properly harnessed could bring a large turnaround to the Nigerian creative industry. There are few games development companies in Nigeria such as gamsole, kuluya, gameplus, maliyo amongst others.

However, there seem to be a disconnect between the development potential and government strategy, support and regulations. Where plans are being drawn up and agreed, trust of games development and esports sub-sector businesses in the effectiveness of government-led implementation of plans is minimal. The general perception coming across in our discussions, including in the validation workshop, is that government disregards emerging industries until they become visible because of their turnover or earnings, at which point government steps in with tax collection rather than support (and by which time, arguably, no more support may be required). While the exact extent of this government attitude is probably open to question and may vary from location to location and between levels, this general perception of government is an obstacle both for industry stakeholders to claim their role in existing government plans, and for organizing any public-private dialog and cooperation to solve any issues that could benefit from cooperation between the two spheres.

As far as market competition is concerned, it has become much harder on a worldwide scale to generate profits in this market because, with few exceptions, small games from small teams do not achieve very high turnouts.

99.9% of all mobile games are not profitable and it is clear that a small proportion of games development companies make most of the money.[76] And there is no end in sight: The major distribution platforms for mobile games, App Store and Google Play, have increased the number of games by an average of 134 respectively 211 per day during 2021.[77]

In Nigeria, there is clearly plenty of room for growth, but growth in terms of GDP and employment are more likely to be viable if a few small or medium businesses are able to break through as scalable digital content businesses with a games component. This would provide for a more structured environment for revenue generation and retention and enable the sector to go beyond a current model of multiple small businesses operating in a crowded regional and global marketplace.

In addition to the rapid shift in the business models for games development, technological innovations and the diffusion of mobile devices (like tablets or mobile phones) have also profoundly changed the structure of the traditional value chain in video game production. For example, the time to market is greatly reduced while the importance of games publishers has receded. Thus, costs are lower and opportunities for smaller players to enter the marketplace have increased. This shifting reality makes it possible for relatively informal and start-up activities to generate new games. At the same time, this leads to crowded marketplaces and makes it difficult for new entrants to be noticed and attract a paying audience.

Without a wider process of formalisation in the Nigerian games and wider digital content sector, it will also be difficult for micro games development companies to generate viable business models without a "born global" approach where they focus on an international market. For example, the business model of video game developer Gamsole targets foreign customers, with their games drawing inspiration from western releases such as Candy Crush and Angry Birds.

[76]Fidelman 2012.
[77]Own calculations based on game figures listed under https://www.businessofapps.com/data/app-stores/.

According to one founder,

> *"We don't see it making sense for us to design for Nigerians alone … We couldn't have gotten …*
> *9 million downloads in Nigeria."*[78]

More than 60% of video games released by Kuluya are being downloaded outside of Nigeria, with most downloads coming from Ghana, Kenya and South Africa, as well as various Asian countries.

The globalisation of Nigerian content presents the number one opportunity for Nigerian games developers. By distributing content to markets which have a higher degree of formalisation and a higher price point for games, the opportunities for growth are much more significant than a "Nigeria only" approach. In turn, global success is likely to boost local market development, as evidenced in other sectors such as music.

Boosting local story-telling through games which present distinctive Nigerian narratives and aesthetics which can stand out in the global marketplace presents a major skills and employment opportunity for the Nigerian games sector. Another area of opportunity is the creation of children's content. The goal, according to another founder, is to grow the local games community by finding "narratives relative to our environment" and telling stories that appeal to Nigerians, which in turn makes them distinctive and thus compelling in a global marketplace.[79]

There is a growing number of Nigerian micro enterprises working in mobile games. However, few companies have developed to a significant scale. The following are the main Nigerian games companies, each of which has a different business model, core market, and creative direction:

- **Bison Play:** www.bisonplay.com – "Game and media development company who embrace technology to develop the best design solutions, whether it's app development, creating a totally awesome website or developing your brand identity."

- **Gamesole:** www.gamesole.com – "We create games and simulations to solve real-world problems" (including games to navigate the Lagos traffic).
- **Yinola Games:** www.yinola.com – "There are many good apps on mobile, Yinola's ethnic theme is better and refreshing. The best thing is that our apps are absolutely free." (Yinka Iyinolakan, Founder, Yinola)
- **Chopup Games:** www.chopup.me – "We give the world games that tell the African narrative. Play any ChopUp game and be sure to have fun and play something new and African."
- **Maliyo Games:** www.maliyo.com – "We build African inspired games for mobile."
- **Genii Games:** www.geniigames.app – "Learn Yoruba, Igbo, Twi, Ewe, Kiswahili, Wolof and a growing number of African languages in the Genii Games App."
- **Junub Games:** www.junubhames.com – "We aim to drive a generational shift in mindset to inspire children to promote a sustainable peace."

All of the above companies are focusing on distinctively Nigerian / African content – utilising Nigerian stories, context and vernacular to gain traction in both the local and the international marketplace. Some, e.g., Genii Games, have an education focus, such as with their programme of games which operate as teaching tools for different African languages. Some, such as Maliyo, embrace distinctively Nigerian experiences and narratives as a unique selling proposition.

As we are starting to witness with these games companies, in Nigeria, the games industry, similar to music, fashion and film, will no doubt develop its own distinctive innovation model. This is likely to be different from models developed in the Global North, requiring

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[78]Vourlias 2014.
[79]Interview Dec. 2021.

novel approaches to skills, research and development, and infrastructure. The rise of Boomplay[80] as a digital platform for African music demonstrates growing appetite for locally produced content if the overall streaming package is affordable, accessible, and attractively packaged. For Nigerian games companies to gain scale, they will need to benefit from technological shift which drives market growth. Or in other words, the fortunes of games companies are intertwined with the fortunes of a wider digital ecosystem.

This includes the ways immersive and extended reality impacts on the games sector, with opportunities to blend physical and virtual reality as part of a growing leisure or experience economy. In addition, blockchain technology may shift the business model for games by aggregating intellectual property and providing a design solution to piracy. One leading expert on the Nigerian creative industries, asserts that for Nigeria to prosper in the global creative economy, it will need to develop its own pathway which includes maximising the growth of Nigerian streaming platforms and distribution channels which champion Nigerian creative content made by Nigerian creative talent, with a dual focus on global market penetration and local market development. This approach requires a highly skilled creative industries sector coupled with advances in the formalisation of all areas of sector development, from legal and regulatory structures to investment models.

> *"The questions for me though are many. They include: Is there enough awareness in the African creative economy, of the opportunities and threats that all these digital advances portend? Are African creatives and content makers properly positioned to capture this value for the continent? What stake do we as the African creative economy have in the ownership of platforms where this value is created? Who is commissioning the content that is going on these platforms? What stories are getting told? Who is getting paid? There are many upsides, but do we understand the downsides enough? What is the implication for cultural policy? For the role of government? ... Is Africa ready for the digital disruption of the creative economy?"[81]*

There is also room for significant market growth from foreign inward investment into the games industry especially in the areas of infrastructure, the formalisation of value chains, and bringing additional finance for games development. However, it can also risk the displacement of home-grown talent via the import of games created elsewhere.

Tecnotree, a Finnish-based global provider of digital transformation solutions for Communication Service Providers (CSP) and Digital Service Providers (DSP), launched a digital multi-experience platform, Tecnotree Moments in collaboration with MTN Nigeria[82].

> *This "aims to create lifestyle bundles of content, applications, and connectivity through a pre-integrated digital partner ecosystem for global, local and glocal high-demand and hyper-growth sectors. The platform will attract leading partners across different sectors such as education, entertainment, gaming, sports, health, and wellness, to enter Nigeria and use direct customer billing to convert ecosystem partners into instant revenue generators".*

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[80]See: www.boomplay.com. Boomplay, which launched first in Nigeria in 2015, is provided by Transsnet Music Limited, Hong Kong SAR, a member of Transsnet Group, itself a joint venture between NetEase and Transsion Holdings, the makers of Tecno Mobile. It is not a local digital company, but it does focus on local content – mostly music / video.

[81]Interview Oct. 2021.

[82]https://www.prnewswire.com/il/news-releases/mtn-nigeria-launches-digital-multi-experience-platform-with-tecnotree-moments-for-gaming-and-education-843194042.html

Such platforms may serve to accelerate the growth of the Nigerian games sector and formalise access to market. But it is unclear how they will support the retention of IP for micro games (and other) creative companies.

Chapter 2 referred to the general business environment as it affects different enterprises in Nigeria. Based on our interviews, we asked businesses what are important challenges to market entry and growth for employment in the digital games sector and put the most frequently mentioned issues to a separate online ranking exercise in order to see how businesses in the games development and esports sub-sector ranked these more specific challenges in the business environment for their operations.

Challenge	Qualification
Access to computer hardware	mainly for esports
Access to equipment	mainly for esports where there is a very direct relationship between cost of equipment and return on investment
Access to finance	mainly for esports
Access to software	mainly for esports
Bureaucratic procedures	particularly refers to the threshold that broadcasting poses
Connectivity in Nigeria	
Copyright infringement	mainly for games development
Digital infrastructure in Nigeria	esports more affected than games development
Exchange rate fluctuation	
Finding collaborators with relevant skills	strong constraint in esports (e.g. assembling teams for international competitions), but also highly relevant for games development
Monetising and / or collecting payments	
Power supply	more easily dealt with in games development than in esports which depends on speed and has high power consumption during training play
Regulatory environment	

**T.10 Employers' qualified list of general challenges to growth for employment in games development / esports.
Source: Validation workshop discussion of online survey results of games development / esports businesses.
Observation: Alphabetical order.**

The results of this exercise were presented for debate at the validation workshop, resulting in a number of qualifications that are added to the list above. While the challenges are relevant, they have quite different degrees of importance for the two sub-sub-sectors and it is therefore not useful to rank them.

For example, in esports prize money fuels the business and sponsoring (access to finance) is of fundamental importance to prepare, launch, and run competitions or the participation of teams in competitions. These expenses cannot be covered by secondary incomes, e.g. from streaming. Esports also requires latest generations of equipment in order to compete at world level which is less important for games development where PCs (desk tops) are sufficient. Esports also draws on significant amounts of energy for high-speed operations and is therefore more vulnerable to power cuts than games development.

The validation process has shown that depending on the angle or the question concerned insufficient differentiation even between sub-sub-sectors in the creative industries can also lead to results that do not adequately reflect reality. The problem resulting from conflating different business models and practices is not exclusively found at the aggregate level. Depending on the specifics, several iterations of analysis and discussion may be necessary to achieve valid results.

The relative importance of finding collaborators with relevant skills came out significantly lower in ranking than in the fashion sub-sector. This can probably be attributed to the fact that standards are more easily specified and established in games development and esports because many of them directly relate to the softwares deployed.

5. EDUCATION AND SKILLS PROVISION

5.1 Education and training for creative industries: can we shift to world class TVET?

In terms of education and training for creative industries, ICT and the digitization of courses has made learning and training for interested persons easier and flexible allowing quick participation and accessibility for all. However, this comes with an issue of availability of resources to participate in the learning process, the British council in Nigeria created an e-learning programme for aspiring and early-stage young African entrepreneurs connecting them with free online course to support them in their business journey. Initiatives like this provides an ecosystem in which creatives can thrive successfully. Nexford, an online university based in Washington DC offers a wide range of courses to close the skill gap in the creative industry which would help bolster the skill set and business acumen of creatives. The creative sector skill gap report created by Jobberman, Nigeria turned a spotlight on the various sectors of the creative industry that require more human capital, this includes cinematography and videography, project management, marketing, acting, graphic design and photography.

Nigeria lacks a systematised accredited programme of education and skills development in the creative industries. Provision varies significantly by institution and State. Many institutions lack any provision, while some provide dedicated courses in technical skills (e.g., sewing, weaving, computer programming), but not fused skills (e.g., computer programming with design, business and entrepreneurship). There is also significant disparity in resources and infrastructure, with private institutions in general endowed with better facilities but with higher-priced courses. Added to this, a shortage of specialised teaching staff and a lack of connectedness to the current realities of creative industries activity in Nigeria, trends and innovation, and it is clear that the provision of tertiary education is not fit for purpose in the context of a diverse and fast changing creative industries sector.

Consequently, to enter the industry requires a significant level of self-learning, self-direction, motivation, and entrepreneurship, resulting in an industry that is developing organically but without the requisite support to harmonise and enhance the pace of growth. The consequence is a fragmented and disjointed industry with players having to work on several parts within the value chain, lack of specialisation and an updated skill set to carry out new challenges within the creative sector and thus run the risk of producing mediocre outputs Generally, Nigerian tertiary institutions will do well to scale-up and diversify on creative skills development by offering a more varied and up-to-date course provision which effectively meets demand and contributes to interconnectivity across the creative value chains. Partnership with industry would also help to ensure courses are more fit for purpose in a fast-changing sector. Investment in technical infrastructure and human resources are also much in need, though difficult to finance.

Polytechnics in Nigeria are pivotal to skills development for the creative industries. Polytechnics, being highly practice-based spaces for learning, have the potential to contribute enormously towards bridging the skills gap in Nigeria's creative industries, but require a more coordinated and networked approach both to and within the sector.

A key limitation is that few institutions offer dedicated creative courses and those which do face challenges in terms of infrastructure and human resources. The Federal Polytechnic in Auchi, Edo State, offers some courses in the creative industries via the School of Art and Industrial Design.

Vocational education and training in Nigeria cover a variety of sectors in the creative industries, especially areas where tertiary and higher institutions have yet to establish a coordinated and industry-driven offer. From film making to fashion design, games and animation, to advertising, the vocational sector offers the most eclectic skills mix in Nigeria.

Creative industries skills provision in the Nigerian higher education system is, as with the tertiary sector, skewed toward certain sectors and neglectful of others. The most common creative industries-related programme across both public and private higher institutions in Nigeria is "mass communication". The course content is a mix of learning in print and broadcast media, combined with adjuncts such as public relations and advertising. This programme is not specialist and is barely industry-driven.

In addition, some key institutions host creative arts and media departments. These include the University of Nigeria in Nsukka, the University of Benin, the Pan Atlantic University, the University of Port Harcourt, the University of Lagos, and a host of other federal and state universities. The creative programmes offered in these institutions range from painting, fine arts and sculpting, to theatre/ performing arts (in some) and textile design (which overlaps with the fashion sector).

"The universities give you a foundation that is very lacking… I make up for this through mentorship. Our universities have industrial attachment programmes, but we know that they don't really work; because you go to the place where you've been posted, they don't give you the attention required. You are there a number of weeks or months, they sign-off your paper, and you go!" [83]

Qualitative evidence generated for this study points to a reality where many of the more successful and high-profile creative industries practitioners and entrepreneurs accessed their higher education overseas in institutions with specialist resources and expertise; and access to global networks. While this has clearly impacted positively on their own career development and injected the Nigerian creative industries with a 'cosmopolitism' and international dynamic, it also narrows the labour market for higher-value creative professions and risks positioning the creative industries as a middle or upper class vocation. Enhancing domestic education and increasing access to courses and career path opportunities is clearly required for the creative industries to grow as an inclusive and sustainable industry.

Gaps in the tertiary and higher education skills landscape, combined with poor quality and low levels of standardization in the vocational training system, have made it imperative that skills are effectively developed within the industry itself. A majority of the consultees on the British Council 2016 rapid assessment study were self-taught or acquired their skills through

mentorship methods, i.e., informal learning/ learning by doing respectively on-the-job training, sometimes supplemented by open access resources online. Others have been trained or re-trained by their respective employers in industry.

According to our discussions with entrepreneurs in both sub-sectors, fashion and games development / esports, entrepreneurs felt that skills were not sufficiently standardized for them to be able to select candidates based on qualifications and certifications obtained. While it is possible in the digital sphere of games development to search for competent staff via the internet and even scheduling training courses and selecting participants based on their performance in the training courses, this avenue currently does not exist in fashion.

In fashion, one of the interlocutors mentioned that they preferred recruiting employees who had not gone through any training prior to joining the business so they would be able to shape their skills exactly the way needed, without any need to unlearn acquired skills which they felt did not meet their standards.

[83] Consultee response in British Council 2016: 18.

5.2 Fashion sub-sector

Overall, education and skills provision for the fashion sector is very multifaceted and under-coordinated, in particular when links of the fashion sector, as a core creative industry, to the garments and textile industries are considered. In part this is because the fashion sector itself is variegated, covering activities from micro enterprises working in tailoring and sewing or cottage industries, all the way to large manufacturing and distribution companies. Fashion design and design-making is just a small part of the overall fashion industry. Moreover, the fashion industry is increasingly integrated across a set of interdisciplinary activities, from "advertising to agriculture", with a myriad of activities involved in the design, development, distribution and retail of fashion products.

Ensuring courses of Nigerian tertiary institutions are more fit for purpose in fashion would require an upgrade on the courses provided, e.g., courses on digitalisation and fashion enterprise, ethical and sustainable fashion, or global market trends.

Polytechnics require a more coordinated and networked approach both with different parts of the fashion industry. There is patchy provision across traditional skills in fashion, e.g., tailoring, overlocking, working with dyes, and leatherwork. These skill sets are strongest in demand for employment in the fashion value chain, i.e., for very small enterprises serving a local market, far removed from the creative fashion design skill sets.

Yaba College of Technology in Lagos is an exception among the polytechnics. It offers courses in fashion and textile design. Federal Polytechnic in Auchi offers a course on graphics and textile design.

Examples of tertiary level skills provision for fashion

- **Back and Better, Lagos -** courses in fashion and crafts, including necklace stringing and beading.
- **Ginani, Lagos -** Fashion illustration, sewing, garment cutting www.ginani.net
- **OSC College of Fashion, Lagos -** pattern and sewing skills, make-up artistry, fashion marketing and merchandising, textile design. www.osccollegeoffashion.net
- **Shola Animashaun Photography School, Lagos -** includes fashion photography and the business of fashion www.sholaanimashaun.com

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There is no formal standardisation of vocational skills training for fashion and the wider creative industries in Nigeria. The training institutions vary from informal and small-scale one-on-one crafts or dressmaking tutorials to notionally accredited organizations with authority to confer diplomas and professionally recognized certificates. Given this diversified and semi-structured nature of the vocational skills supply landscape, quality benchmarks tend to be difficult to ascertain, especially in areas where no regulatory body is visible.

In one fashion school in Abuja,[84] for instance, "at the end of their training with us, we give students a certificate of completion and participation...". These certificates are not formally affiliated to the Nigerian Universities Commission or any other professional body, even though the individuals who "graduate" from this organization will contribute to Nigeria's creative industries skills landscape in fashion. The challenge is not that fashion school does not want to be accredited or recognized as a professional skills transfer organization, rather "we do not have a body that regulates these things, that I can go to and say give me the power to issue certificates". The cost of accreditation is also a major barrier to small scale skills providers keen to demonstrate quality but unable to afford to do so.

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[84]https://www.facebook.com/ellabenard/

Examples of of vocational skills provision for fashion

- **Fashion, Art and Creatives Academy (House of Henri), Lagos -** courses in fashion design, bridals, soft furnishings, jewellery, modelling. www.fashionandartacademy.com
- **International Film and Broadcast Academy, Lagos -** focused on audio-visual but courses on costume design, make-up and photography www.ifbalagos.org
- **Instituto di Moda Burgo, Lagos -** diploma / certificate in fashion design, styling, pattern-making, dress-making, tailoring, clothing technology, computer aided design, photography, shoe design, jewellery design. www.imbnigeria.com
- **Leg Apparel Academy, Lagos -** Introduction to fashion, history of arts and costumes, drawing techniques, colour theory, fashion styling, fashion entrepreneurship, computer aided design. www.legsapparel.com
- **Valismo Fashion School, Lagos -** basic fashion artistry, bridal fashion, kids fashion, sewing classes. www.valisimofashions.com
- **Zaris Fashion and Style Academy, Lagos -** fundamentals of fashion design, fashion entrepreneurship, fashion photography, business of fashion. www.zarisfashion.com.ng

Fashion design is another sector that is conspicuously absent from the Nigerian higher education creative skills provision. This sector has mostly depended on skills transfer in the vocational and industry-led categories. Transversal skills are also under-developed, e.g., in creative business management and entrepreneurship.

Some courses on textile design do exist. Many of the leading fashion designers and fashion entrepreneurs accessed higher education internationally in institutions such as London College of Fashion:

"The kind of education and contacts developed there isn't available in Nigeria. I focused on sustainable fashion and the circular economy, as well as innovation in textiles…. this is key to the future of fashion, but not being taught in Nigeria" (Fashion design consultee).

Examples of of vocational skills provision for fashion

- **Department of Visual Arts & Technology, Cross River University of Technology (CRUTECH)**
  The Department of Visual Arts & Technology offers a range of creative courses including Textile Design. They are re-accredited by the National Universities Commission (NUC) every five years. www.crutech.edu.ng
- **African University of Creative Arts, Lagos -** courses in fashion design - to be launched www.au-ca.org
- **Auchi Polytechnic, Edo State -** courses on graphics and textiles. www.auchipoly.ed.ng
- **University of Benin, Benin City -** courses across the creative arts, including textile design.
- **Yaba College of Technology, Lagos -** the most extensive range of creative courses, including fashion design and textile design. www.yabatech.edu.ng

> **Examples of industry skills provision for fashion**
>
> Fashion Development Agency, Lagos – a private development programme including principles of fashion design, draping and flat pattern cutting; management and entrepreneurship support on setting up a fashion business. *www.facebook.com/fashiondevelopmentagency*
>
> **Lagos Fashion Week -** multiple business networking and knowledge exchange activities. For example:
> - **Fashion Focus Africa -** talent discovery initiative that creates access to Fashion Focus Fund, knowledge transfer, information exchange, networking opportunities, and access to market;
> - **Fashion Business Series** to facilitate conversations with key players from the Nigerian and Pan African industries and beyond, as a useful tool for exchanging ideas, networking, and developing the fashion industry.
> - **Green Access -** Talent discovery with a vision to encourage designers to create social, economic, and environmentally sustainable fashion brands
> - **Visual Makers Fellowship -** Created to empower budding filmmakers and photographers with workshops and masterclasses.
>
> *www.lagosfashionweek.com*

Annex 10 proposes a few ‚modern' job profiles for the fashion sub-sector that may be worthwhile to develop based on the current trends in this sector. They could serve as a starting point for recalibrating the education system, job by job, and focusing its output on industry demand.

5.3 Games development/esports sub-sector

Different from fashion where skills in Nigeria have already been cultivated over long periods of time and many are rooted in a vast reservoir of tradtion and culture, education and skills provision for the games development and esports is virtually non-existent, and the basic skills are to be acquired in studies of information and communication technology (IT and/ or ICT), industries that have begun to have their impact worldwide all the way to consumer level toward since roughly 30 years and therefore require relatively ‚fresh' skills that, moreover, are in continuous and rapid evolution. As a result, ICT outcomes for any country are closely related to the interaction between ICT readiness (infrastructure and access) and ICT capability (skills) which both are needed to increase ICT use (intensity) which as a self-reinforcing feedback-loop then can lead to ICT outcomes.[85]

Currently, there are no data being reported by or to the ITU about the levels of skills in Nigeria and comparison with other countries is therefore not possible (see Annex 2). The ranking of Nigeria in the combined ICT index has traditionally been midfield on the African continent or classified as low. Current development of the combined index is very much driven by the expansion of the ICT readiness element which is improving. The question is whether ICT skills are improving at similar or faster pace in order for ICT use to increase to a level where there are increasingly visible ICT outcomes.

When index data from the Global Innovation Index[86] are used as a basis of comparison, school life expectancy is considered a weakness and tertiary education levels may be comparably low to compete in ICT. Both ICT access and ICT use are considered to be weak in comparison with other countries in the same income group. That being said, and this is certainly an

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[85]These are the three stages in the evolution towards an information society identified in ITU 2017 that were therefore used to establish the ICT development index.

[86]WIPO 2021. Nigeria was ranked 118 out of a total of 132 economies.
Interlocutors at the Ministry of Education felt more generally that the local industry is constrained by a lack of requisite skills to drive innovation in the creative industry which translates to a lack of capacity building.

encouraging signal, knowledge-intensive employment is assessed as being a strength in Nigeria not only in comparison with countries of the same income group, but in comparison with all countries indexed.[87]

Nigeria appears to have one of the highest growing internet penetration rates in the world, yet education and training provision in digital development and literacy is still patchy and lacks clear accredited pathways into growth sectors such as games development and esports, as well as all the other sectors where digitalization may reinforce development processes.

There is a lack of a focus on digital skills development in the formal education curriculum, with programmes by private sector providers, usually in the form of afterschool sessions and post-secondary school certificate programmes. Mobile phone is the most common means of access to the internet. The use of other devices such as computers, laptops and tablets is not as widespread given cost considerations, and depending on demographic characteristics, location, jobs of parents.

Online safety is another area of concern, and initiatives such as WTEC are providing training on online safety for girls and women. A four-year doctoral study into the digital practices of teens in South-East and North-Central Nigeria[88] found that Nigerian teens rely extensively on the mobile phone and the mobile internet for social connectivity, and social media is a decisive factor for children's happiness, relief from stress and boredom, and for managing mental health.

The study found that a growing number of Nigerian teens have access to digital technologies, particularly mobile phones and the internet. The frequency of mobile phone usage by teens in Nigeria, the length of time they spend using mobiles and the internet, is quite significant. Two-thirds used mobile phones for between 1 to 5 hours whenever they got a chance.

There is a growing market for digital technologies to support the school curriculum by private providers. The edutech space tries to bridge the gap between formal digital educational provision (which in some cases, especially in public sector schools is non-existent) and user needs. In Nigeria, they are focused primarily on children. Young adults typically enrol in computer classes/ colleges after secondary school, during the time they are waiting for their results, and tertiary education postings.

The games development and esports industry in Nigeria is fast developing benefiting from the large youth population. While there are no registered institutions that offer games development or esports as one of their courses, interested gamers get experiential training, and those who wish to work in other jobs in the ecosystem have to self-develop by learning by doing, watching online videos, e.g. on YouTube, or paying for online courses to be able to gain the requisite skills. Increasingly, games developer companies are having to provide training to upskill their recruits. Many people within the games development and esports space are self-trained, drawing on YouTube and online sessions.

This landscape of limited digital learning in educational settings and the almost total absence of games education, is showing signs of disruption. For example, Hugo Obi of Maliyo Games[89] shared some of the work they are doing to create African-inspired games for mobile users. Kucheza Gaming[90] is a Nigerian start-up which is pioneering the use of digital games in educational settings to support the development of STEAM education (Science, Technology, Engineering, Arts and Maths) rather than STEM education (which did not include the arts).

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[87]For a more detailed business perspective of a global IT firm concerning ICT skills in Nigeria cf. Adepetun 2019.
[88]Chikezie Uzuegbunam 2019.
[89]https://www.maliyo.com
[90]https://www.kuchezagaming.com/

EMPLOYMENT AND LABOUR IN THE CREATIVE INDUSTRIES -
NIGERIA FINAL REPORT

Bukola Akingbade, chief executive officer of Kucheza Gaming, puts digital games to the heart of the learning journey:

"Video games are going to be a more important and credible part of education in Nigeria and the wider continent…More people are starting to see what a difference games can make when they intersect with education. It's about legacy. Kids are already creative and have passion and things they want to do. Bringing games into education and vice versa can facilitate impact at scale. This will impact art and activism and politics and culture too. Collaborations like the Minecraft Uncensored library project gives us a glimpse into what can be possible when we embrace a world of play".

Bukola goes on to say:

"I do think that the intersection of video games and education will help lead us to a point where a game industry will contribute significantly to GDP here. The intersection of games and education is a starting point for all of that. What's happening in the space today is shaping the future of a lot more than games, and the generation growing up with games as part of their education are going to do some amazing things in the world".

Dr Sidney Esiri of Kon10dr is working to develop an esports training academy to develop capability within the ecosystem. In the esports sub-sector, this certainly makes sense. Where fast-tracking the skills development of talent is the key ingredient to success, one specialized institution like an academy can be the focal point for a whole region or even a country to take care of the training of the comparably few highly talented individuals who usually have been selected on specified games, similar to a school of national cadres.

In 2007, the National Information Technology Development Agency Act established the National Information Technology Development Agency (NITDA), the National Information Technology Development Fund (NITDF) and provides for the President or the supervising Minister to designate and facilitate the establishment of Information Technology Parks. The Act empowers NITDA to plan, develop and promote the use of information technology in Nigeria. The National Information Technology Development Fund constitutes the main intended source of funding for NITDA programmes.

Vision 20:2020 is the economic blueprint for placing Nigeria among the biggest 20 economies in the world by 2020. Whilst this vision is yet to be achieved (and the requisite data and metrics to track are not readily available), education will play a key role and ICT equally so. Main objectives [91] are to:

1. Make ICT an enabler to transform the socio-economic sectors of Nigeria.
2. Deploy ICT in Government to improve the efficiency and effectiveness of service delivery.
3. Attain globally competitive local capacity with regards to human capacity in all aspects of ICT.
4. Attain competitive local capacity in ICT infrastructure.
5. Develop the ICT Industry for the production of Software and Hardware global Standards.
6. Pursue research and development (R&D) activities and encourage innovation in ICT.

[91]Report of the NV 20:2020 National Technical Working Group on ICT.

With the AfCFTA, the need for information technology becomes even more apparent, to facilitate cross border trading for products and services. As Nigeria marches towards its goal of basic literacy for all and the creation of a new generation of leaders, it will be all the more important to build digital education capacity in the classroom and to extend and formalise digital education into the tertiary sector, where provision is patchy, lacks accreditation and is rarely linked to building the competencies required in sub-sectors such as games development and esports.

The Ministry of Education shared the strategy for digitizing the school curriculum, however, there are no current plans to digitize TVET. The e-learning platform launched by the ministry is a way to drive interest in ICT within the educational sector. It also organizes bootcamps for girls on a yearly basis as a way of driving their interests in ICT.[92]

Annex 10 of this report proposes a few ‚modern' job profiles for the games development and esports sub-sectors that may be worthwhile to develop based on the current trends in this sector. They could serve as a starting point for establishing courses in the education system that focus its output on industry demand.

[92]Interview.

6. LABOUR DEMAND

6.1 Fashion sub-sector

There is no single source (data or other) on the demand for labour in the fashion industry of Nigeria. Qualitative evidence drawn from interviews and our survey of fashion enterprises in Nigeria (which has a limited sample and is purely for illustrative purposes) points overall to a largely informal and network-based approach to recruitment in what remains a micro-enterprise sector.

The majority of fashion enterprises are self-initiated, especially those in the designer-fashion sector. In this context, demand for labour is matched by supply through self-employment. Then demand for specialist services – from sewing to photography, make-up to CAD – are outsourced via networks and validated through word-of-mouth endorsements (both on-line and off-line).

> *"It is a network-based sector. We are avid networkers and always on the lookout for talent – for collaboration, to provide services, or even just to know the competition. It is always hard to find people with the right skill-sets and there is always a process of learning on the job"*
> (Interviewee – fashion intermediary).

> *"There are very few firms of any size or fashion houses. Fashion is a central part of the wider entertainment sector, with fashion influencers shaping agendas and promoting Nigerian creativity. This is driving demand for Nigerian fashion in local and international markets. But so much is informal and demand for skills and labour is met on a just-in-time basis"*
> (Interviewee – creative industries specialist / lawyer).

Firms, as they gain traction in the marketplace, rely on providing skills and professional development in-house, their demand for suitably skilled labour rarely met. One example is Ruff nTumble[93], which has 17 outlets across Nigeria selling kids' clothes:

> *"These kinds of firms are in desperate need of specialists in design, colour, marketing and communications, digital...but they tend to train them in-house"*
> (Interviewee – creative industries specialist / lawyer).

Such firms require diverse skill-sets across a complex value chain which is currently very fragmented in Nigeria. For example, design is separated from manufacture, with clusters of manufacturing (e.g., for shoes, T-shirts, jeans etc.) in locations far from the design houses (e.g., Aba in Southeast Nigeria has a strong manufacturing tradition for shoes).

[93]https://www.ruffntumblekids.com/

What are the expected trends in labour demand?

One way of trying to approximate the future development of labour demand is to ask businesses to estimate their future estimates for growth and how this would translate into labour demand, i.e. additional need to recruit staff or co-workers.
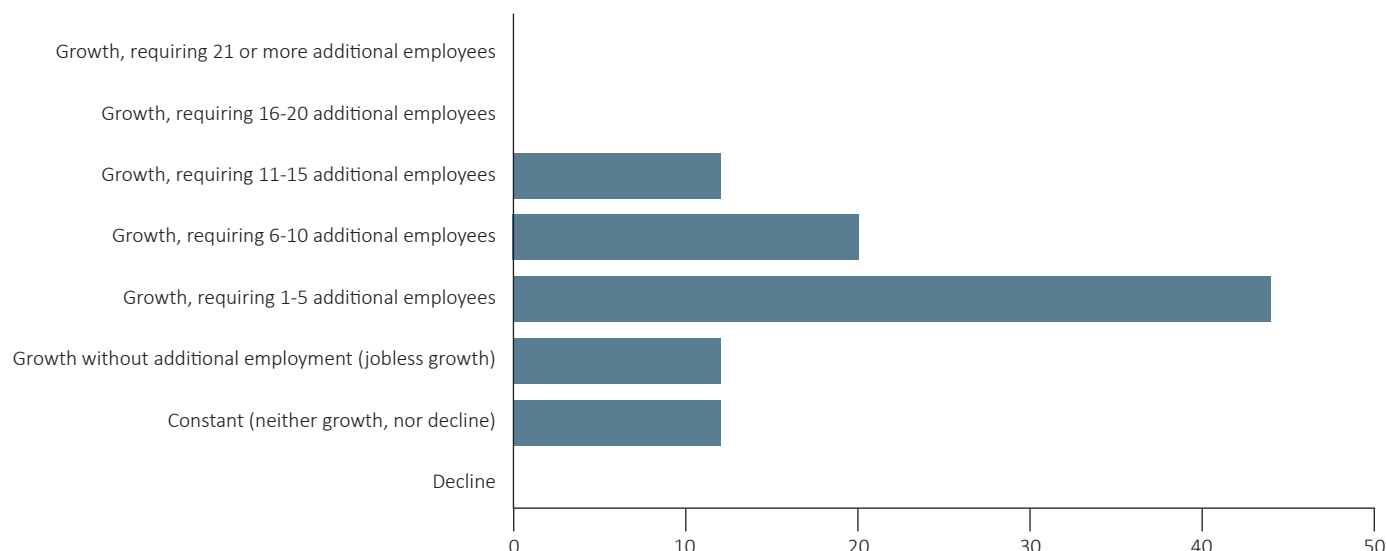
G.11 Employers' 5-year job growth expectation in Nigeria's fashion industry (after pandemic, choose one).
Source: Online survey of games development / esports businesses, n = 25, NR 2.

Average survey participants in fashion enterprises expected their business would grow and require them to recruit between 1-5 additional employees over the next five-year period. While one-fifth expected to recruit 6-10 additional employees and one-eighth even 11-15 additional employees, there were similar shares of the sample that expected to see no growth or growth without requirement to recruit additional employees. With the fashion businesses in our sample dominated by freelancers and micro enterprises, the additional employment will not necessarily take them out of these categories, but for some that could imply a slow restructuring process-- if they so desire-- as they may need to recruit more people than their current employment totals. Yet, this rather gradual process is unlikely to generate a significant boost in overall employment figures.

Priorities for developing the industry so as to be able to expand labour demand

Besides asking for their expectations for growth, we also asked businesses what were more general priorities in the field of skills and employment for growing the fashion industry in Nigeria. Additional growth could lead to additional employment opportunities.
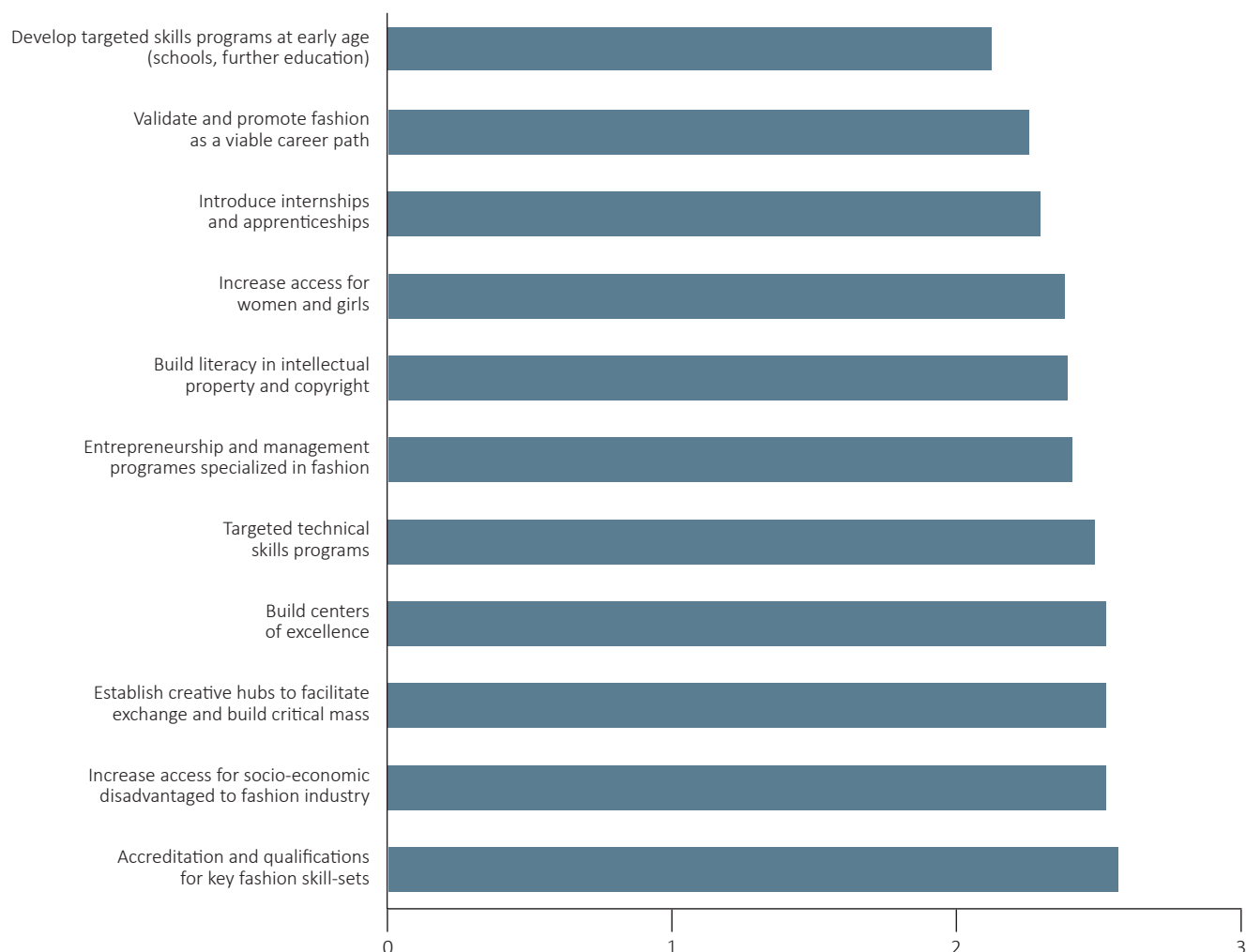
G.12 Employers' highest priorities for skills and employment in growing the fashion industry (weighted average).
Source: Online survey of fashion businesses, n = 25, validated in workshop.

The most highly ranked response was accreditation and qualifications for key fashion skills-sets. This emphasis resonates with the statements made in interviews that standardization of qualification was lacking in the labour force, and expectations oftern were not met.

Creative hubs and centers of excellence were second and third highest on the list. In other words physical proximity or clustering in connection with support structures promoting excellence appeared to be an element that could enhance growth opportunities. This is followed by targeted technical skills programs and specialized entrepreneurship and management programs.

The 'increased access for socio-economic disadvanteged persons to the fashion industry' which figured in second place in the survey was dropped from the list after validation debate during the workshop. While some well-known members of the fashion industry appear to be conscious that the fashion industry opens possibilities to those who are disadvantaged,[94] it is not considered a priority as such for achieving growth.

Other suggestions that have been collected from diverse stakeholders to develop the fashion industry include:

- Accessibility to long-term funding (financing) at low single-digit loans should for fashion entrepreneurs, including ease of applying either through online platforms or in person.

- Elimination of bureaucracy in the application process and response time.
- Collaboration and partnerships amongst members and well-meaning organizations as well as funding partners.
- Structured marketing system easing the problem of visibility of fashion creatives.
- Integration of modern methods and approaches in creating fashion pieces.
- Development and streamlining of the fashion ecosystem for the nigerian and international market.

What kind of skills respond to labour demand?

Our survey also asked the sample of fashion businesses what they consider to be the major skills gaps in the Nigerian fashion sector – i.e., the skills they demand in their business or for which the sector as a while requires. Their responses point to demand for a comprehensive range of skill-sets in the labour market (see graph below).

This broad and diverse level of skills demand needs points to an inadequate supply in core areas across the fashion value chain. It is noteworthy, however, that business skills and management comes at the top of the list. This could point to a lack of business and management elements being taught in conjunction or alongside the technical skills as the latter are being acquired at institutions of training.

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[94]While our sample could be biased to employers who are thinking beyond their own business interests (after all, they offered their time to answer our survey), there are a number of well-known personalities in Nigeria's fashion sector who have made getting people out of poverty a personal objective to pursue. Cf., *inter alia*, Sun News Online 2017 or This Day Live 2020.

Business skills and management	Fashion design
Machine operation and maintenance	Export marketing
Quality management (garment production)	E-commerce
Tailoring	Computer aided design (CAD)
Marketing and sales	Market research
Sewing	Fashion management
Textile technology	Digital fashion (immersive technology, metaverse etc.)
Pattern making and cutting	Brand management
Dyeing and washing	

T.13 Major skills gaps ranked by importance in Nigeria's fashion industry.
Source: Validation workshop discussion of online survey results of fashion businesses.
Observation: Order by ranking (more important first) resulting from validation workshop discussion.

The second potential surprise is that second in line are skills which constitute traditional hard skills in the textiles and garment industries which both have had long-standing tradition in Nigeria that normally should serve as a reservoir of living knowledge (machine operation and maintenance, quality management in garment production, tailoring sewing, textile technology, pattern making and cutting, dyeing and washing).

Could it be that youth entering the labour market is not being trained up to the levels of skills of the older generations, or are curricula not up to date to incorporate current technologies, or both? This requires deeper study and verification. This prioritization, however, does dovetail with some of the interviews where our interlocutors pointed to the fact that there are no standards implemented in training and that they could not rely on certificates to determine whether job applicants possess of adequate skills, including simple things such as ,to do as told and not according to their habits' (arguably a soft skill).

At the same time, the skills that would a priori be considered the most innovative or modern (e.g. CAD, digital fashion; fashion, brand, and quality management) were the least sought for by our respondents. Were our respondents too innovative themselves to not perceive any such needs? Careful follow-up interviews, meetings, or broader surveys in the sector may be useful to explore the implications.During the validation workshop, these rankings did not change.

The survey could also signal that the demand for digital skills is perhaps lower than for skills in the design, development, and production of garments.
This either suggests that such businesses are not in need of services such as digital marketing, or such skills are readily available in an increasingly tech-literate and digitally innovative country.

The composition of our small sample of convenience (see Annex 1) in fashion for this small survey further displays a demand for a range of skills in a set of emergent segments of the fashion sector for which

there is considerable potential for growth and innovation. There are firms which focus on sustainable fashion (e.g., circular fashion), ethical fashion (e.g., inclusive fashion based on fair trade) and smart fashion (e.g., wearable technologies). These are growing in significance for the Nigerian fashion sector – as featured in a range of platforms at Lagos Fashion Week 2022, which focused on responsible sourcing, circular economy and sustainable textiles[95].

Correspondingly, there is a demand for skills across the fashion value chain which can also operate in an increasingly ethical and environmentally conscious context. Four-fifths of the firms in our sampe specialise to some extent in sustainable fashion[96]; and one-third in both ethical and smart fashion. This, arguably, foreshadows increasing demand for both technical and strategic skills as well as wider literacy of, for example, the impact of fashion on the environment and innovation to reduce waste, support inclusion and drive technological transformation.

"It is a mixed picture in Nigeria. On the one hand we need fast fashion to reach consumer demand at a price point which works for them. On the other hand, we depend on import (e.g., textiles), so there's a big carbon footprint and inefficiency in the supply chain. It would be crazy to scale up a fast fashion industry. We need to develop specialism in sustainable fashion which is responsibly sourced, and which supports local producers"
(Interviewee: creative industries intermediary).

Lagos Fashion Week has, as with many other developments in Nigerian fashion, been a beacon for trends across the fashion sector. It has championed the development of ethical methods of manufacturing and consuming fashion products with brands such as Lisa Folawiyo, Kiki Kamanu, Nkwo Official, and Wanger Ayu in leading the way in sustainable Nigerian fashion. DyeLab is another firm that is leading the way in sustainable fashion producing on-demand indigenous adire designs for a contemporary market. Abiola Olusola is another designer promoting the use of adire designs and locally-sourced fabrics (cotton, silk and linen) designed for a contemporary market. [97] Other organizations such as Heritage Apparel are focused on garment production for designers (mostly mass-market), and Designers Consociates which is focused on developing sustainable fashion in Nigeria and the wider African continent. Such firms require different business, managerial, communication and technical skills than fashion brands which focus on growth alone.

Besides these innovative and environmentally more friendly trends, there is also a wider development process in the Nigerian fashion sub-sector which is based on the search for a distinctive market position – both regionally and globally. As demonstrated by the stellar success of Afro-beats artists in recent years, there is growing global demand for a Nigerian culture in general, and its aesthetic, musical and story-telling skills in particular.

This places an additional set of desirable attributes in the recruitment of talent to the fashion industry. Fashion is increasingly a fused sector: It is art, story-telling, performance and design. It connects heritage and modernity to generate narratives of identity. For Nigeria, the fashion industry is becoming increasingly conscious of its distinctive cultural narrative, with a style and aesthetic that has to stand out in the global market place to gain traction. Our survey confirms this, with four-fifths of respondents developing fashion with a specifically Nigerian or African story and/ or aesthetic.

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[95]See for example: https://www.youtube.com/watch?v=uHhzlS8hVQY&t=30s

[96]According to Green Strategy, sustainable fashion is "manufactured, marketed and used in the most sustainable manner possible, taking into account both environmental and socio-economic aspects." https://themadameblue.com/blog/5-environmentally-friendly-brands-in-nigeria/

[97]Adire: tie and dye; designation for indigo-dyed textiles made using resist-dyeing techniques.

There is a growing Afro-centric approach to fashion design, aesthetics and brand development in Nigeria and across the continent – in part a response to the colonising influence of generic fast fashion, whether bought as new or imported second hand. A process of reclaiming diverse Nigerian heritage, including its aesthetic traditions, is underway. This is political, but also a smart strategy in a highly competitive marketplace. For example, weaving contemporary designs into a traditional West African fabric, Nigerian

Tsemaye Binitie is creating fashion he hopes can also bridge the gap between luxury and the everyday. His material of choice is Aso-oke, a hand-woven cloth indigenous to the Yoruba people and historically used on special occasions.[98] Binitie, who cut his teeth as a design assistant with Stella McCartney in 2005, began using the fabric in 2017, and he infuses the yellow dresses that are his signature creations with cottons and silks to give them a post-modern feel:

"We started to use contemporary African art and culture within the threads of the collection, so you see hints of it...We are sort of preserving the culture, you know, that we've watched all our lives in front of us ... and teaching the younger generation that it is something to be proud of, something to want to wear"[99]

Fellow Lagos designer Lisa Folawiyo specialises in a different traditional cloth, the West African wax prints known as Ankara, and her hybrid collection, called Batkara, incorporates Batik designs embellished with needle-work beadings and sequin trimmings.

"We have merged what is indigenous to us with what is familiar in the West and we've made it ours."[100]

That same synthesis informs the aesthetic of Alara, a Lagos store dedicated to showcasing contemporary African fashion for the Nigerian and the diaspora markets. Its Head of Partnerships, Arinola Fagbemi, says more and more people are thinking about African luxury *"in terms of how we live on a day-to-day basis ... not just for celebratory moments."*[101]

This fusing of heritage and contemporary requires the renovation and transformation of traditional skills into a contemporary fashion sector – from how to source and utilise traditional textiles to how to create a brand narrative that works for both local and international markets. This places further demands on the skill-sets required for a flourishing Nigerian fashion sector.

Indeed, to thrive even as a micro fashion enterprise increasingly requires strategic positioning, trade and exchange both inside Nigeria and internationally. Many fashion enterprises are increasingly 'born global'. They need to develop export readiness skills from day one. Nearly one-third of our survey respondents have just one-tenth of their business in Nigeria, compared to two-fifths where the entire business trades in Nigeria. The location of the market influences demand for skills and talent, with export readiness often involving partnership with firms in other markets and demand for skills in export development (e.g., customs, duties, regulations).

[98]For this fabric, see also Agbadudu and Ogunrin 2006.
[99]https://www.usnews.com/news/world/articles/2021-03-19/with-traditional-fabrics-nigerian-designers-fashion-a-new-aesthetic
[100]Ibid
[101]Ibid

This demonstrates demand for talent and demand for talent with the range of fused skill-sets described in this Section. Put simply, a lack of supply of suitably skilled talent is a threat to the growth of these enterprises – hence the need for some dedicated actions to drive skills development across the Nigerian fashion sector. As one interview puts it:

"It's not an industry when it has so many gaps, is so informal and where the best talent struggles for opportunity. We need root and branch reform to the education sector, a transformation of tertiary provision, and structured programmes of professional development. And that's just as a start".
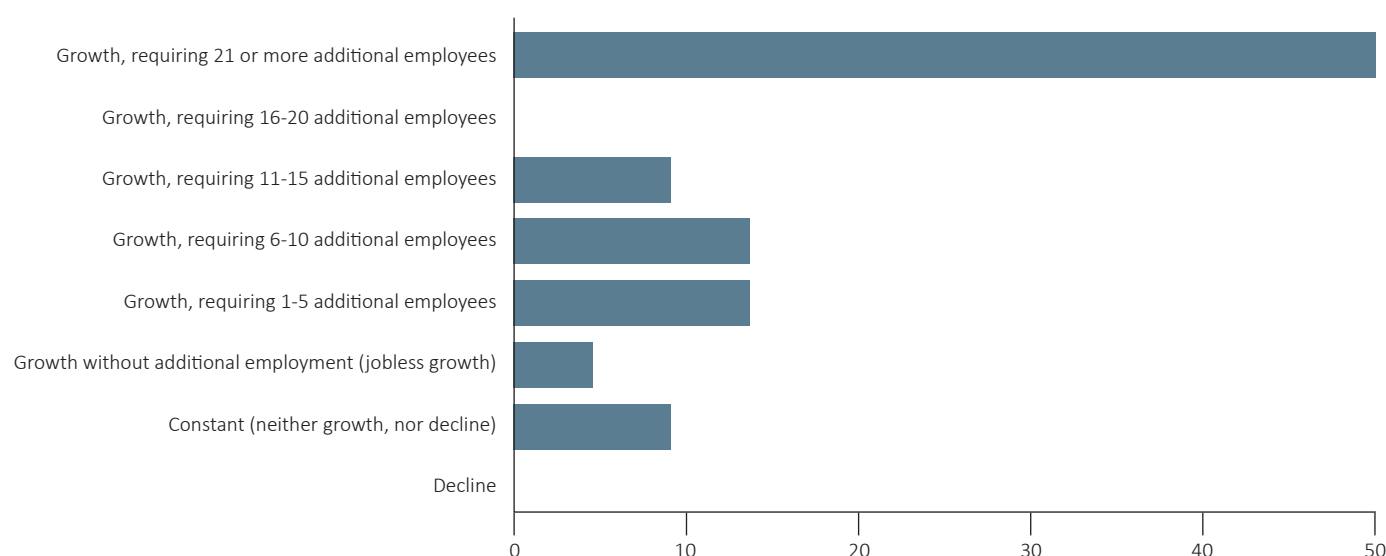
6.2 Games development / esports sub-sectors

There is no single source (data or other) on the demand for labour in the games development and esports industries of Nigeria. Most data sources are dominated by information on esports and betting and less on the emergent computer, console and mobile gaming. Qualitative evidence drawn from interviews and our small survey of gaming enterprises in Nigeria points overall to a largely informal and network-based approach to recruitment in what currently still is a micro or small business sector. The majority of games development enterprises are self-initiated and often operate as a part-time pursuit (e.g., weekends and evenings on top of other jobs). Outside of the main firms (introduced in Section 4.2), it is often difficult to ascertain if a games developer is a serious professional endeavour or the act of an avid hobbyist. Or both.

Esports and betting have driven much of the growth in Nigeria's games sector and the largest firms operate in these activities. Our small survey engaged respondents from a range of games companies, spanning from freelancers to esports companies with over 250 employees, and the businesses work across different types of games development and fuse disciplines and platforms (see Annex 1). Two-fifths of our sample of convenience operate in esports and two-fifths have games development as a core function. One-third of the small sample are freelancers or operate micro enterprises, one-fifth operates SME and over one-third are larger firms with more than 250 employees. This sample is therefore not representative of a sector made up disproportionately of freelancers and micro enterprises. However, significant growth is pivoting toward larger firm sizes, especially in esports.

What are the expected trends in labour demand?

Asked the question what growth expectations businesses in games development and esports would have, our small survey yielded different results from the fashion sub-sector. Average survey participants in games development and esports businesses were split along their basic business sizes, the share of freelancers and micro and small enterprises in the sample being roughly the same as the share of medium and large enterprises.

Half of the sample expected their business would grow and require them to recruit between 21 or more additional employees over the next five-year period. One-seventh of the sample expected to see no growth or growth without requirement to recruit additional employees, and the rest somewhere between 1 and 15 over the 5-year period.

G.14 Employers' 5-year job growth expectation in Nigeria's games development / esports industries (after pandemic, choose one).
Source: Online survey of games development / esports businesses, n = 22, NR 1.

This variety in responses could possibly indicate that scaling up may be more easy in the games development/ esports sub-sector when opportunities arise than in fashion. Certainly, it would be plausible given that the choice for growth in the fashion business may ultimately entail either opening further outlets and/ or more substantial physical investment in garment manufacturing. This is fundamentally different from the situation in games development / esports where investment cost are significantly lower both because equipment should be, on the whole, cheaper, and space

requirements are not as high, including the possibility of directly collaborating from multiple locations. A differentiation is required for esports, though, where the importance of competing at highest levels usually requires investment in top-notch equipment and entails high energy consumption whereas games development usually gets by with 'average' personal computers.

As a newly emerging sub-sector, growth rates in games development / esports, from a low base, usually should also be higher than in the fashion sector which has

been in place for a long time. At the same time, if sufficiently qualified job seekers are not available, it is conceivable that labour demand in this sub-sector may turn to candidates from abroad. In other words, where Nigeria is not able to answer the demand, jobs may be transferred abroad, migrants could take them up, or the industry itself may prove to be footloose and move to a labour market of another country where its demand can be met.

One of the obvious advantages of games development and esports as digitalized activities is that they may find co-workers in different countries and collaborate across borders via the internet, similar to multinational firms can usually jump trade barriers. Similarly, they can also select to move to different countries where the conditions for their businesses to thrive are better. Lastly, there is always a latent risk that successful operators, both employers and employees, are directly being attracted by firms from outside the country or the region (brain drain).

Priorities for developing the industry so as to be able to expand labour demand

We also asked businesses what were more general priorities in the field of skills and employment for growing the games development and esports industry in Nigeria because additional growth could lead to additional employment opportunities beyond those already forecasted by the businesses.

Based on our interviews, we put the most frequently mentioned priorities with a focus on skills and employment to develop and grow the Nigerian digital games industry to a separate online ranking exercise in order to see how respondents in the games development and esports sub-sector ranked specific priorities. Ranking derived from responses did not show significant variation.

Develop targeted skills programs at early age (schools, further education)
Introduce accreditation and qualifications for key games skill-sets
Establish creative hubs to facilitate exchange and build critical mass
Entrepreneurship and management programs which specialize in games industry
Increase access for women and girls to games industry
Increase access for socially disadvantaged people to games industry
Validate and promote digital games as a viable career path
Build literacy in intellectual property and copyright
Introduce targeted technical skills programs

T.15 Employers' highest priorities for skills and employment in growing games development / esports.
Source: Validation workshop discussion of online survey results of games development / esports businesses. Observation: Order by ranking (more important first) resulting from validation workshop discussion.

The results of this exercise were presented for debate at the validation workshop, resulting in a slight reordering of the ranking of the priorities as displayed in the table above.

There was general agreement by the participants in the validation workshop relating to the priorities that the foremost priority for developing the industry is identifying and developing talent and content. If this is achieved, innovation can be achieved.

There were discussions as to the validity of increasing **access** for women and girls to the games industry when there are no discriminatory practices observed, even in esports. Participants clarified that solving the question of lower female participation in the workforce in games development and esports is multifaceted and rooted in existing traditional roles and behaviors which tend to keep females overproportionately out of the sub-sector when at the same time females seem to display the same amount of enthusiasm to play digital games as their male counterparts. While acknowledging that today's parents are not as traditional as the parents of today's parents, there still may be a need to develop specific balancing strategies to increase participation of females in the industry and overcome any social barriers to their increased participation.

Access to and/ or representation of females and female mindsets and behaviors in the games industry have been discussed at international level for quite a while, and strategies or measures for shaping the industry in a way that females may become more involved have been proposed.[102] Balancing out gender proportions in the sub-sector should open up additional opportunities for shaping games to increase the variety for the benefit of both sexes, and even influence the visual representation of persona of both sexes in a way that conforms with a broader choice of different (n) etiquettes. Given that females on average are generally as active in playing digital games as males are, they should certainly not be neglected as a segment with its own preferences and styles. First movers to tap that specific potential are likely to still be able to carve out a good market share for themselves, both in Nigeria and worldwide.

When it comes to increasing the access of socially disadvantaged people to games industry to expand the question is of no lesser complex nature and relates to more fundamental income distribution and inclusion in Nigeria. This may take more time to solve than increasing female participation and will involve further increasing mobile phone ownership and subscriptions in Nigeria, providing early access to ICT in schools, possibly developing educational games for elementary school students in order to reach them before they may drop out, develop strategies for establishing links with or hubs in rural areas so they may more easily catch up, and helping citizens of rural areas to develop talent and content that they may increasingly gain income from. For lack of time, no specific conclusions were reached at the validation workshop, but the thread may be picked up by any follow-up activities.

Priority areas otherwise identified to grow the Nigerian digital games industry for skills and employment development include:

- Increased investment into the games development and esports industry in Nigeria.
- Monitoring and regulation of games development activities to prevent theft of intellectual property, providing structure for market entry and exit.
- Awareness education and enlightenment of youthful population to engage in digital skills training such as games development and esports, the success of the industry also depends on the population (ICT use) involved (the intensity).
- Government involvement and participation in the development of, and planning for the growth of the digital games development industry. (TETFUND, an agency within the Ministry of Education allows for the engagement of graduates to be more hands on and practice the aspects of their studies. More agency like such should be created).
- Provision of more ICT centres that are accessible to youths to engage.

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[102]Cf. *inter alia* Prescott and Bogg 2014.

- Capacity building – upgrading and upskilling of training centres[103] and the development of programs for individuals in the games development and esports sub-sectors to broaden their knowledge and integrate contemporary methods towards creating digital games.
- Collaboration and engagement with partner organizations in the gaming industry that can provide human and financial capital to enhance the Nigerian gaming industry.

What kind of skills respond to labour demand?

Figure G.16 below sets out what employers in games development and esports say are major skills gaps in the Nigerian games industry – based on respondents of our survey. As with the fashion sector, this demonstrates demand for talent across a wide-range of areas/ skill-sets. The demand for skills is most significant in technical aspects such as coding, software development, games design and programming. Talent with these skill-sets is in huge demand across the creative and wider knowledge-based industries, with transferable skills into major sectors such as financial services which, on average, provide better wages and conditions beyond the reach of most games companies.[104]
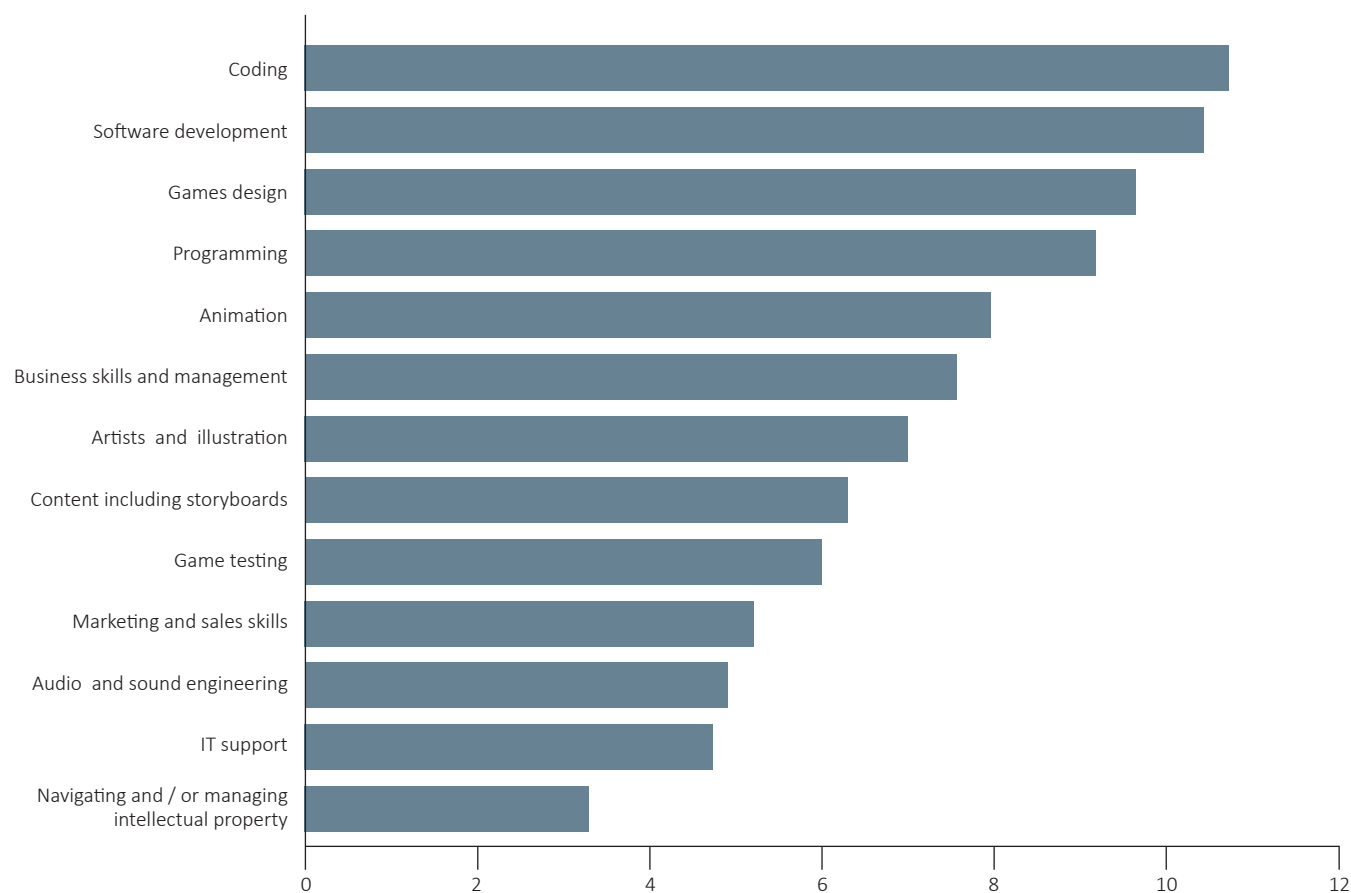
G.16 Major skills gaps ranked by importance in per cent in Nigeria's games development / esports industry.

[103]Interlocutors at the FMLE pointed out that infrastructures for developing the creative industry are still undeveloped including the inadequacy of training centers.
[104]However, there are also cases where ICT people from sectors such as financial services move into games development because they would like to move on in their personal careers.

Demand for a range of other technical, business and strategic development skills is also apparent – an outcome of under-provision in the tertiary and higher education sector and the relatively poor reputation of gaming as a valid career path.

As one consultee puts it:

> *"We need to validate the sector. Gaming is creative, technical, high growth and serious. It involves art, technology, engineering, story-telling and design. There are also huge opportunities for serious (educational) games and games which help to tackle societal challenges from traffic congestion to health and wellbeing"*
> (Interviewee: Games developer).

There was some variety in the demand for skills by type of business. For example, larger firms were seeking coders, software developers, programmers and designers more than smaller firms. They also prioritise training in IP management. This is in part because such smaller firms are led by entrepreneurs who hold these skill-sets. Larger firms also expressed greater demand for business skills and for specific skills for which they would need to hire either new staff or sub-contracted staff – e.g., illustration and audio and sound engineering. Generally, though, 'harder' skills are in stronger demand than 'softer'.

Our survey also illustrates the following:
- Freelancers stress the importance of providing creative education and core digital skills at an early age.
- All enterprises prioritise the need for accredited skills programmes in games development.
- Businesses of all sizes point to the need to increase access to the industry for women and girls.
- Freelancers also prioritise the introduction of creative hubs – so they have access to networks, infrastructure and skills provision.

Additional demand-side skills considerations relate to the target markets for games development companies and, by extension, to the type of market (and brand) position games companies adopt. The sector is less export-driven than the fashion sector, with respondents mostly focusing on nurturing the domestic market – including the growing millions of smartphone users.

The sector is also less focused on developing a distinctively Nigerian or African aesthetic than fashion, although there are examples of firms adapting Nigerian folklore, aesthetics and realities into games formats. One-third of survey respondents are focusing on such an aesthetic, seeking to build markets through cultural distinctiveness. This opens-up demand for additional skills such as in story-telling, illustration and music composition. (See Annex 1 for the structure of the small sample of convenience).

Few firms point to skills development needs in relation to the next generation of digital transformations – such as the growth of immersive technologies, artificial intelligence, bitcoin and even the role of the metaverse in gamification. However, this is most probably due to the focus on current demand for skills rather than future demand.

In summary, the demand for suitably skilled talent in the Nigerian games industry is high. Opportunities for employment growth are challenged by the lack of appropriate skills across almost every element of games development (across the value chain). Furthermore, where there is ready supply of talent – e.g., in coding – this talent is not focusing on the games sector as a valid and reputable career path. The negative profiling of games in Nigeria is still limiting potential for growth and restricting employment opportunities for creative and technical talent.

During our validation workshop, participants agreed a useful distinction between:

• training for hiring, and
• training the pipeline.

It is acknowledged that educational institutions will never be able to perfectly customize general education and technical and vocational edcuation to enterprises' needs, but that the goal must be to minimize (or reduce) the gap that exists between the needs (or demand) of employers and the supply of labour so that training for hiring (or "conversion' from school to business) can be more effective and less costly. This requires as a prerequisite that dialog be established between the employers and educational institutions (be they government organizations or private sector providers) to negotiate the required standards and regularly update them based on mutual discussion and consent.

7. LABOUR SUPPLY

The creative industries in Nigeria are considered to have significant potential for employment of young people. This potential emerges in the availability of current formal and informal job opportunities as well as the growth potential within the industry. According to an estimate by Jobberman Nigeria, the creative industries (understood by Jobberman to comprise media, entertainment, tourism and hospitality, visual arts and handwork, and lifestyle and beauty) currently employ about 4.2 million people, with the potential to create 2.7 million additional jobs by 2025, thereby contributing to the reduction of youth unemployment and total unemployment. The largest shares were estimated for beauty and lifestyle (2.1 million employees) and entertainment (1.4 million employees).[105] The largest increases by 2025 were estimated to occur in beauty and lifestyle as well as visual arts.

According to our rough estimates based on occupational data (see Annex 3), current (2019 = pre-pandemic) employment in the Nigerian creative industries amounts to 3.2 million people or 6% of total employment.[106] Out of these, if the assumption holds that the average overall ratios between females and males in the whole economy in different occupations (e.g. ICT technicians, salesworkers) are similar in the creative economy, roughly 1.9 million are females and 1.3 million are males.

The strongest occupational segment in the creative economy in Nigeria are hairdressers, beauticians and related workers who number 0.9 million, followed by textile, fur and leather products machine operators with 0.5 million (if we want to include all of them in the creative industries), 0.4 million sales, marketing and development managers and 0.4 million garment and related trades workers. There are 0.2 million handicraft workers and 0.2 million service managers (that are estimated to work in the creative economy). The much more visible and frequently mentioned creative and performing artists which often represent the image of the ‚creative industries' amount to 0.1 million employees (with a fairly equal split between females and males).

These 3.2 million persons represent aggregate creative industry labour supply for 2019 that has met aggregate demand because it has led to effective employment in specific occupations. To which extent there is demand in the creative economy that cannot be sufficiently met, or supply where there is no demand, is difficult to estimate from available data. Generally, though, it is fair to say that where there is more employment, there is more demand (though age structures and economic trends and changes in productivity will influence the validity of this statement). From this perspective, the creative industries and their sub-sectors, while not negligible, certainly are not Nigeria's powerhouse for employment.

Creative skills provision is wholly inadequate across further, tertiary and higher education: This is in part because these sectors inherit pupils from a school system which has not supported creative skills development. But it is also because the curriculum for creative industries activities is underdeveloped, and the provision of coherently designed, accredited and certified courses is largely absent. This results in a lack of quality control and low levels of reform and innovation. For example, it is common for courses taught 25 years ago (in a pre-digital era) to still be taught in classes. There are some differences in quality, e.g., the private universities tend to have more industry-relevant provision than public universities, and there is some good practice in institutions such as the Pan Atlantic University. There are also some examples of reform and innovation.

- However, a young creative talent today could not today be confident
  » that the course they are on is relevant to the industry of their choice (i.e., designed to match skills gaps or growth areas),
  » that the course materials and teaching standards are on a par with those in other institutions in Nigeria or internationally,
  » or that the equipment and resources available represent industry standard.

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[105]To place the number in context: NBS 2017 estimated employment in arts, entertainment and recreation to amount to 557,000 persons. Achieving 1.4 million employees by 2025 would require a job growth rate of 12.5% per year between 2017 and 2025. Cf. also Annexes 3-6.

[106]The differences to the Jobberman estimates are based on different definitions (our data, for example, does not include tourism and hospitality), methods (more cautious approach), and sources. What is important here is to understand the orders of magnitude of the employment creative industries are generating in Nigeria more generally.

- The general perception is that the most innovative and successful creative talent in Nigeria received at least a part of their education overseas, but this is not sustainable for long term sector growth, and it positions the creative industries as the preserve of the privileged few. A further issue is the lack of dedicated creative industries careers services, skills or employment match programmes or professional trade and training bodies who can provide a brokerage and strategic development role in matching creatives to employers or in designing training programmes as part of a wider skills development framework for Nigeria's creative industries.

Nigeria's creative economy is built on relatively informal systems of practice. There is a lack of formal, accredited and industry-recognized creative qualifications, for both technical and managerial occupations. While there are institutions offering technical vocational education and training (TVET), these are usually old style and will need revised curriculum to be able to provide the skills development required for creatives to harness the new form of opportunities. The Nigerian technical and vocational educational training established by the government in collaboration with private sector is critical to the upskilling of mid-level manpower to ensure sustainable economic growth.

Creative skills are predominantly learnt on the job: Learning occurs either through self-teaching or business-led training. While this is in some ways a quality of the Nigerian creative industries – with the energy and passion of creative entrepreneurs carrying them a long way toward sustainable careers – it is also a major weakness. If Nigeria is to have a major creative economy, it needs a skills base that can compete with the best creative skills at a global scale. In Nigeria today, there are too many skills gaps, technical skills (from tailoring to coding) are not developed to a competitive standard, and innovation skills (e.g., in use of materials or technologies) are under-leveraged. Every country

has high levels of self-taught creative entrepreneurs and learning on the job is a critical component of professional development. However, in most instances it is a top-up on an existing skills base which has been developed through a systematic approach to course design and structure, where creatives gain accredited qualifications, and where access to accredited training with quality assurance continues in the workplace through the provision of a rich market of specialised creative training programmes, apprenticeships and a carefully designed internship offer.

This in turn means that employers can gauge the level of skills of prospective employees and are not exposed to the risk (as they commonly are in Nigeria) of training an individual only for the person to then move on to another firm. With a consistent level of training across the workforce, labour market mobility becomes an asset rather than a weakness. The lack of strong sector networks and trade bodies in Nigeria also limits the transfer of skills and knowledge and sharing is not yet a core business across the creative industries.

The education system in Nigeria is regulated by The Federal Ministry of Education. The standard system (updated in 2008) requires a year of pre-primary education, 6 years of primary education, 3 years of junior secondary education and 4 years tertiary education (9-3-4) to be in line with the universal basic education programme. Tertiary education includes universities, polytechnics and colleges of education The system is managed by both private, public and third sector stakeholders who are in charge for the management of, and provision of educational facilities.

Critical thinking is not encouraged in the schooling system: The formal education system is very traditional in style. Pupils are rarely encouraged to challenge the teacher, to think independently, problem solve, and collaborate.

Rote learning: Where students are taught to memorise in order to pass exams which affects the extent to which they are able to develop innovative problem solving and self-leadership skills.

Lack of focus on the creative industries: Where arts are taught in schools, the focus is more on traditional fine arts, and contemporary art practice or electronic arts are not reflected in the curriculum. Creative entrepreneurship and the promotion of creative careers are very rarely encouraged and supported, which in turn devalues the creative industries as a serious and respected sector. On the other hand, there increasingly are classes related to information technology and computer usage which may equip students with basics for considering entering the digital side of the creative industries. However, the required linkages for this synergy to happen are missing.

Teacher renumeration and strikes: Teachers and lecturers in the Nigerian education system (especially the public sector) typically earn low salaries, and in some cases, are not paid on time, leading to frequent strikes which affects the length of time students are in school (for example, the Academic Staff Union of Universities has been on strike for over 4 months.

Limited validation of 'creative work' as a sustainable career path. The creative industries are not widely understood for their potential as viable or high-value jobs. In comparison with traditional high-esteem occupations such as in medicine, law and finance, the creative industries are either not widely considered as a viable industry or are misunderstood as low-income. The exception here is "celebrity culture" associated with actors, musicians, and in more recent cases, fashion designers. But success is not associated with high levels of skill built through a formalized and standardized education and skills system. Similar to other countries' entertainment sub-sectors, success appears to be more associated with luck. But it may also come with some element of hard graft, and perhaps a thread of nepotism. The overriding perception in Nigeria still is that creative professions are not "proper jobs" and even careers backstage or behind camera roles are particularly under-valued. This limited validation of creative work is in part a reflection on the very challenging circumstances for success in the creative industries and a contributing factor to such circumstances. A more (yet not overly) formalized structured and thus accessible industry model may provide clearer pathways from education to industry.

Challenges in technical and vocational education and training (TVET)

Some of the challenges of implementing TVET in Nigeria are:

- Low societal recognition: This translates to low enrolment of students as TVET is seen as a lesser qualification to university degrees. Moreover, they are not aware of the schemes and opportunities available.
- Shortage of skilled workforce to impact the vision and mission of the TVE scheme
- Obsolete instructional facilities as there are no funds for securing updated instructional materials, and little to no planning from the government for TVET education
- Poor staffing- lack of human capital and resources for recruiting interested trainers and facilitators
- Poor linkages with industry and general deficiency in quality of education which tends to be generally deficient as students are unable to directly practice theoretical knowledge taught in school.
- There is a lack of data and evidence on creative industries evolution. While acknowledging the phenomenal rise of the film industry as a self-sustained and viable sector in informality, this is not conducive to developing approaches to regulation and its enforcement (e.g., where warranted or useful on intellectual property protection), labour, investment, and infrastructure. It partially also undermines the business model for many creative products and services that may benefit from formalization and higher levels of skill.

7.1 Fashion sub-sector

The fashion industry production process in Nigeria comprises fashion designers, crafts persons, beamers (loom workers), patternmakers, dressmakers, buyers, fashion photographers, designers, graphic artists, handicraft tailors, embroiderers, stone washers/ pressing machine operators and textile technologists among others as part of the production value chain.[107]

The bulk of the supply into the Nigerian fashion labour market is comprised of micro (in many cases, sole trader) enterprises working in neighborhoods to provide tailoring services to the local community. These skill-sets come from apprenticeship system, where primary or secondary school leavers work with a more experienced tailor until they are experienced enough to set up their own 'small' outfit. Other higher skilled talent come from fashion training centres where students learn more intermediate tailoring and design skills. However, the fashion designers who are garnering international acclaim have benefitted from educational programmes abroad (usually the United Kingdom, USA and France).

Crafts persons, the textiles industries, manufacturing of clothes and the growing sector that focuses on fashion shows and exhibitions which also include models, stylists, hair stylists, make-up artists, model agents, photographers, and a host of other indirect-fashion businesses come together to make up a fashion ecosystem that is more wide-ranging than simply having retail/ online stores, design houses and brands, and fashion magazines. The fashion industry encompasses other smaller and more niche subsectors which may provide a rationale for more coordination and strategic focus.

- Creative skills provision is wholly inadequate across further, tertiary and higher education: This is in part because these sectors inherit pupils from a school system which has not supported creative skills development. But it is also because the curriculum for creative industries activities is underdeveloped, and the provision of coherently designed, accredited and certified courses is largely absent. This results in a lack of quality control and low levels of reform and innovation. For example, it is common for courses taught 25 years ago (in a pre-digital era) to still be taught in classes. There are some differences in quality, e.g., the private universities tend to have more industry-relevant provision than public universities, and there is some good practice in institutions such as the Pan Atlantic University. There are also some examples of reform and innovation.

- However, a young creative talent today could not today be confident
  » that the course they are on is relevant to the industry of their choice (i.e., designed to match skills gaps or growth areas),
  » that the course materials and teaching standards are on a par with those in other institutions in Nigeria or internationally,
  » or that the equipment and resources available represent industry standard.

- The general perception is that the most innovative and successful creative talent in Nigeria received at least a part of their education overseas, but this is not sustainable for long term sector growth, and it positions the creative industries as the preserve of the privileged few. A further issue is the lack of dedicated creative industries careers services, skills or employment match programmes or professional trade and training bodies who can provide a brokerage and strategic development role in matching creatives to employers or in designing training programmes as part of a wider skills development framework for Nigeria's creative industries.

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[107]Cf. Onyeator 2019: 4.

Wages as a factor in labour supply

Depending on the labour market situation, wage levels may influence labour supply. We therefore asked respondents to our small survey what are typical entry-level wages in the fashion sub-sector.
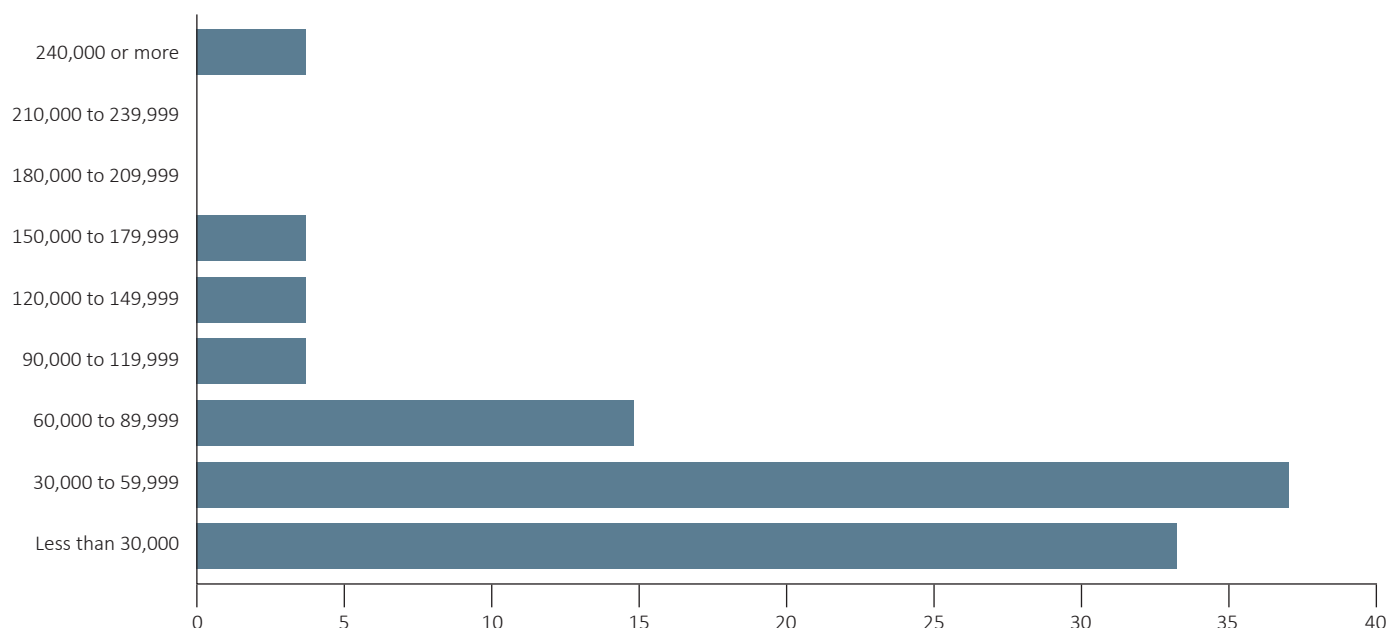
G.17 Entry-level monthly income in Nigeria's fashion industry.
Source: Online survey of fashion businesses, n = 27.

The entry level income in fashion is quite low, and in many cases, the precarious nature of work means that even the amounts stated are not guaranteed from month to month – this affects the attractiveness of the industry to talent, as well as the scope for people to invest in talent development to earn more money. One-third of the respondents to our small survey declared that entry-level monthly income is below the minimum wage. Two-thirds of the respondents declared that entry-level were not higher than two minimum wages.

The entry level, other than for less qualified occupations, normally refers to the typical 'pprenticeship' nature of starting out in the fashion industry. During the validation workshop, participants specified that minimum wage level is typically paid to fabric sourcers, seamstresses, and those in production/ reception.

As determined during the validation workshop, for employees with qualifications, the entry wages are higher than displayed in our survey. In some cases, certain organizations have better paid talent, for example those that work as factory managers and supervisors, as well as those that are engaged in providing ancillary services to the fashion industry (content creation, fashion merchandising).

Wages / salaries in Lagos and Abuja	Occupations
30,000	• fabric sourcer • seamstress • production /reception
50,000	• tailoring • marketing and sales
65,000	• networking
100,000	• sewing • fashion design • pattern making and cutting • textile technology
100,000-150,000	• business skills and management

T.18 Entry-wages for employyes with different qualifications in Nigeria's fashion industry (NGN per month).
Observation: All estimates. Wages are 20-30% lower in locations other than Lagos and Abuja.
Source: Validation workshop breakout discussions in fashion.

However, wages can also vary, for example, with the more experienced fashion designers, the income levels are what is paid on average to tailors for the fulfillment of orders (i.e. no work, no pay). Wages here depend on a volume-based value chain, skill-based education, and skill standardization. Effectively, employees on volume-based work work 2-3 days per week or one week on and one week off, leading to a rough benchmark of NGN 100,000-150,000 per month.

NGN 10,000 per day is an amount put forward for a tailor who can sew already cut pieces with a minimum number of garments to sew in the day. The cut pieces are already cut according to patterns. This implies real division of labour (manufacture) and improved quality of finished goods, as opposed to situations where one person does all steps and makes more errors (one-off production, craft) and work on machinery. NGN 5,000 per day would be the equivalent for out-of-Lagos and Abuja workers and usually based on outfit and exposure. It could also apply to products mainly for mass market and midscale buyers.

Employees who need to network strongly should expect NGN 65,000 per month, and management related jobs starting around NGN 100,000.

More generally, the fashion sub-sector is characterized by relatively low wages and therefore is likely to be characterized by an over-supply of labour. At thes same time, this sub-sector appears to provide important opportunities of access to employment for a larger group of members of the labour force. Expectations for growth are not overly high, and it will not be able to absorb a significant share of the youth bulge in the labour market. For upscale labels, it was noted that someone could expect to receive NGN 100,000 a month unskilled with hands-on training. That attracts good minds, and shows industry as forward looking and worthy career path.

Those who are talented will find opportunities to develop their own niches. Loyalty of employees to businesses is limited, including because of the lower wage level, and talent may move on when the opportunity arises. Employers interviewed are aware of this situation. This kind of attitude is also generally accepted because Nigerians, according to our interviewees, have a strong urge to set up their own businesses which employers can understand because they went through similar processes.

7.2 Games development / esports sub-sector

Significant challenges exist in finding appropriate talent to work in the games development and esports industry. In part, this is due to the lack of or inadequate quality of skills provision at tertiary and higher education level. But this is also due to the reputation of games and esports as either overly associated with betting (therefore morally frowned upon by many, or formally punishable for muslims in certain states of the Federation) or with *"lazy young people avoiding the real world of work"* (Interviewee – games developer).

This means the industry struggles to attract the brightest and best talent – which will therefore look to other sectors for career progression. Computer gaming in Nigeria remains a relatively informal sector underpinned by a thriving scene of internet / gaming cafes and parlours and mobile gamers. International market entry is still emergent, with larger firms put off by the low spending power of the average Nigerian gamer.

One consultee posits that the average Nigerian gamer spends approximately USD 22 a year on games, compared to the average in Sweden of USD 250. Limited access to certain types of hardware is also a barrier to growing consumer demand – e.g., Xbox does not yet have a presence in Nigeria, with consoles operating in the grey or black market. Copyright infringement of software is a further issue in reducing appetite for inward investment and limiting available revenue generation.

The growing market of consumers is generating a marketplace of producers: games designers, animators, producers and technologists developing new content across a diversity of models. These span from dedicated games which adopt a retail or subscription model, to interactive content which generate revenue via advertising, to a more transversal or holistic gamification where an element of games exists in apps or as part of a wider package of creative content, e.g., linked to an advert, a music video, an e-commerce platform etc.

Wages as a factor in labour supply

We asked respondents to our small survey what are typical entry-level wages in the games development and esports sub-sector in order to be able to assess their potential impact on employment.
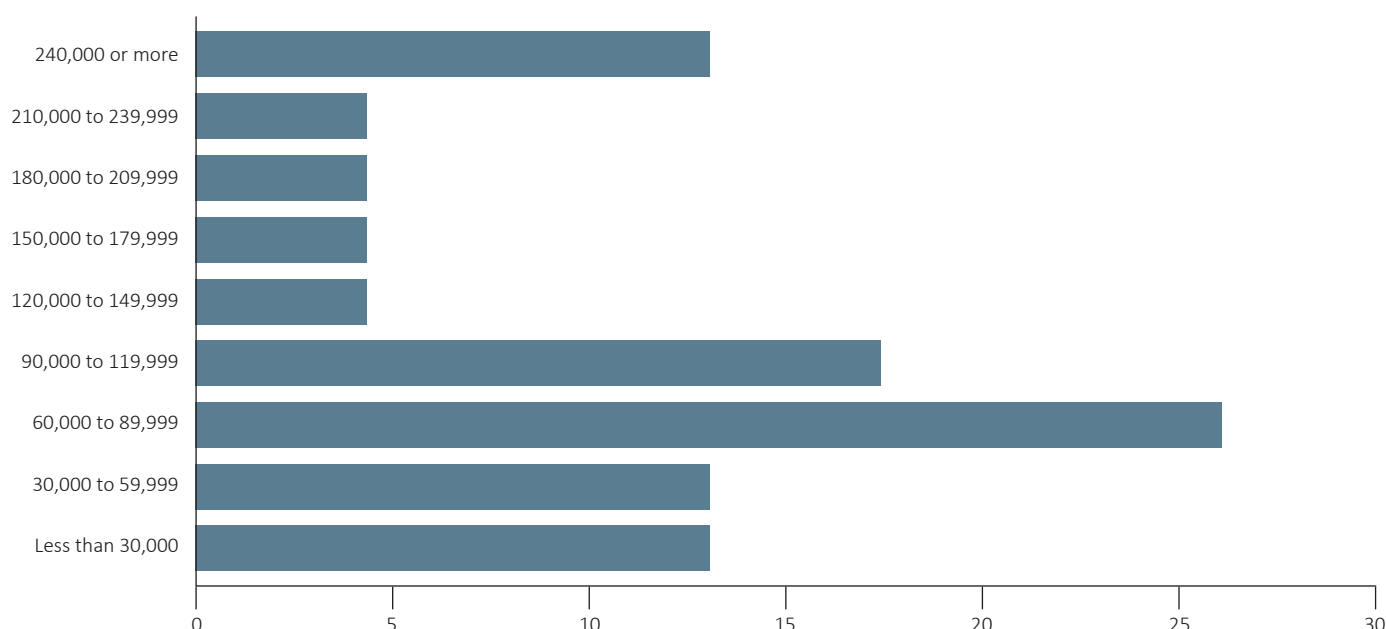
G.19 Entry-level monthly income in Nigeria's games development / esports industry.
Source: Online survey of games development / esports businesses, n = 23.

The entry level income influences how attractively the industry is perceived, and the supply of talent into the industry. Only one-eighth of the respondents in our small survey declared that entry-level wage was below minimum wage. The minimum monthly wage in Nigeria is NGN 30,000, and from the figure above, there is a wide range in the entry level income, some of which has to do with the level of skills required, for example those in game design typically earn over NGN 60,000 a month, with others (e.g., for competition) earning over NGN 240,000 a month. In some cases, the reported level of income is averaged out, with peaks (during high demand for work) and lows (where demand for work is lower), e.g., when there is an esports competition and the industry requires events organizers, games marketers, administrative assistants and testers.

Generally, the games development and esports sub-sector is characterized by relatively higher wages, an average clearly above minimum wage level, as would be expected for a sub-sector where supply of labour is more constrained, and with considerable scope for upward mobility in terms of income and personal growth. The wage level is also likely to be influenced by international wage levels at the higher echelons because talent may find it easy to move abroad for earning better incomes, or accept contract work from companies in other countries without changing their residence.

A key to improving the labour supply in games development and esports is developing advanced ICT skills, possibly by ways of a concerted push from all concerned parties (employers, employees and possibly government in a supportive fashion). Due to the self-reinforcing relationship between ICT use (intensity) and ICT capability (skill) a virtuous cycle could probably emerge in a relatively short span of time, without neglecting the third important element-- continuous expansion of access to ICT.

At this time, the sub-sector cannot yet absorb any significant numbers of youth, and even if growth rates may be high at this time, they may not necessarily imply job-intensive growth. Given the relative scarcity of labour, wage levels should remain attractive and therefore fullfill their function in luring labour into this emerging creative industry. Boosting employment in ICT at diverse levels for building accessible infrastructure in the digital sphere and maintaining the same should therefore be a priority throughout Nigeria's economy.

8. MATCHING LABOUR SUPPLY AND DEMAND

Matching **demand** (job opportunities) and **supply** (job seekers) in the labour market describes the processes of finding employment/ employees and the development of (work-related) relationships between employers and employees. This chapter describes the factors which affect matching in the creative industries and identifies constraints and opportunities.

A wide gap to be bridged

It has been reported that the high discrepancy between the number of jobs available and number of jobseekers force hiring managers to resort to recruiting on proximity or in some cases, from outside of the country. Examples include a Lagos-based communication firm having posted one intern position on Twitter and receiving over 1,300 applications within days, crashing the application software; a commercial bank posting 80 entry-level jobs on Jobberman receiving 21,000 applications within 48 hours; the Nigeria Security and Civil Defense Corps receiving 1.4 million applications in January 2020 following an advertisement for 5,000 positions. These credible figures correspond to ratios of 1:1,300, 1:263, and 1:280 per posting and outdo numbers in other countries with less labour pressure by a factor of 3-5,[108] and it is obvious that human resource managers despite best efforts simply will not be able to screen these applications timely and select the objectively best match for the job in question. Whether these discrepancies between demand and supply are similar in Nigeria's creative industries is bound to vary between different sub-sectors and different levels of qualification.

All matchmaking activities in Nigeria therefore need to be seen against this gap. It is an environment where recruiting by proximity (using personal networks for pre-screening and possibly obtain minimum levels of trust, based on recommendations by known individuals) may impose itself.

Private recruiting agencies

There are private recruiting agencies in Nigeria's market that do provide services to creative industries just as they provide them to other sectors. For example, Jobberman Nigeria goes as far as to produce its own sector and skills reports for the creative industries.[109]

The site's recent posting of jobs include, inter alia, content marketing specialist, visual director, digital marketing specialist, casino and virtual games manager, radio station manager, graphic curator, team lead for creative and entertainment industry, sound designer, creative writer, professional studio photographer and editors, video editor, brand activations and events executive, video editor/ motion graphics/ channel scheduler, editor, video production officer, social media/ digital marketing executive, web developer, call centre agent, content and production planning manager, graphics designer, 3D animator, social media executive, copywriter/ content creator, content strategist, designer, application developer, web and mobile app developer, blockchain full stack developer, e-commerce marketer, mapper, community manager, beauty salon supervisor, gallery/ office assistant, fashion operations assistant, nail technician, beauty therapist, makeup artist, professional hair stylist and braider, art gallery trainee, production supervisor (fashion), fashion sales manager, dark store manager. This abbreviated list testifies both to the variety of jobs and qualification levels sought. All of them are, essentially, white collar jobs.

Other Nigerian websites, e.g., myjobmag.com, hotnigerianjobs.com, as well as foreign websites specialized in job search, e.g., ng.indeed.com/jobs-in-Nigeria (US), NigeriaJob.com (MU/ ZA), are also operating in the Nigerian market including for creative occupations. GrabJobs from Singapore recently highlighted skills such as creative design and jobs such as front-end web developers, digital marketing managers, search engine optimization specialists, stage performers, and content creators among the professions in high demand in Nigeria.[110]

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[108]Weitz 2020. The ease of sending resumés and application letters via the internet, of course, may also be a factor encouraging applicants to take wild chances because the cost of application are so low compared to sending letters by post or traveling somewhere to knock on the door.

[109]Jobberman.com 2021b

[110]https://grabjobs.co/resources/career-resources/job-search/most-in-demand-jobs-in-nigeria/ [retr. 2021-08-24]

It is unclear, however, what is the effective outreach of these recruitment websites, and how successful they are as matchmakers, in particular compared to personal networks that usually dominate in informal contexts. It is not unlikely that these sites are mainly used by larger or formal businesses. The number of current job postings certainly does not testify to high numbers of recruitment.

Government matchmaking

At the request of the FMLE, the Federal Executive Council recently approved the a portal called Nigerian Labour Exchange (NILEX) which is to be housed at the ministry for employment and job creation and is going to be digitalized over the next months. This digital platform is supposed to be used by employers on one hand and job seekers on the other for matchmaking purposes. Employers are meant to upload their vacancies, the type of skill they want, the qualifications of people that fit. Job seekers may register with their profiles and then the two groups are to be matched while employers can speak with job seekers and members of the diaspora who would like to apply via the platform. The platform once operational is expected to replace phone platforms that collect fees to register jobs seekers.[111]

The portal currently does not function and the recent vacancies section leads to a limited number of links, numerous outdated or possibly inserted for testing purposes. The migration resource center link was not active (June 2022).

Effectively, the concept of creating a platform for labour market exchange or matchmaking is not new but part of the mandate of the National Directorate of Employment (NDE) that was established in 1986 and set up as an employment agency statutorily charged with the responsibility to design and implement programs to combat mass unemployment. This included obtaining and maintaining a data bank on employment and vacancies in the country with a view to acting as a clearing house to link job seekers with vacancies in collaboration with other government agencies.[112]

Government also provides some specific match-making services at lower echelons which may be embedded in or combined with a more complex set of measures (e.g. employability training) that are conducive to get people, notably youth, into jobs. One example would be the initiatives under the Edo State Skills Development agency that was established to reduce the rate of youth unemployment through skills development and job creation which is in turn to improve the lives of the residents of Edo State.[113] It reports having started its activities with a state wide registration of over 100,000 unemployed persons with an initial target of creating 200,000 jobs which it reports was surpassed. Under job placement, almost 5,200 youth have been placed since 2018.

Interlocutors at the Federal Ministry of Labour and Employment have reported that employment in jobs that pertain to the creative industries is in very much sought for and that this offer of supply often also can be matched to demand, e.g. for photographers.

Matchmaking in creative industries

For the Nigerian film industry, it is well established that recruitment occurs very much along the same lines as in other countries, i.e., by ways of jobseekers going to auditions where talent is being assessed and may lead to recommendations or direct employment (for a minuscule minority of hopeful applicants).[114] This process is inherent to the sub-sector and most likely also is common practice in the music industry and other performing arts in Nigeria.

According to the web-conferences held with different stakeholders, it appeared that matching in the two sub-sectors of the creative industries (fashion, and games development / esports) does not make any active use of third parties specialized in matching. Instead, the use of social networks, B2B relations and events / symposia dominates. In fashion, Lagos Fashion Week provides significant opportunity for sector networking as well as some provision of training and knowledge

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[111]Cf. Agbakwuru 2022. The platform has been pending for quite a while and now is expected to be upgraded with international assistance. It also figures as NELEX (National Eletronic Labour Exchange), registers and monitors (>500) private employment agencies and has a window for migrants.

[112]The NDE also offers a diversity of programs relating to small business promotion and vocational skills and reports its support empowered, but was not limited to, over one million unemployed youths and women across the country in cosmetology and other vocational skills during the period 2017-2019.

[113]Initially (since 2017) known and referred to as Skill Development Program, now Edojobs.

[114]Cf. Miller 2016, chapter 2.

exchange activities via its Fashion Business Series[115] of workshops and seminars. In games development and esports, the annual Big Africa summit[116] is the major meeting point for games companies and talent. Held in South Africa, it plays a vital role in boosting B2B networking, but by design is out of reach for the youngest and most emergent talent.

Our small survey in the two sub-sectors of the creative industries reveals that matchmaking services are either not reaching these sub-sectors or that they are not considered first choice for finding the staff needed for running their businesses.

8.1 Fashion sub-sector

The results of the validation workshop in the area of matchmaking also reflect the differences between larger and upscale brands and the smaller brands and therefore added an important element of differentiation. While there is high degree of informality in recruitment processes, it is noteworthy that larger and upscale brands are turning mainly to professional networks and word of mouth and recommendations and also seek to get in touch with providers of skills and education whereas the smaller brands are more inclined (or possibly ‚doomed') to turn to job platforms, recruitment agencies, and also social media.

Relying on informal networks perpetuates the informal nature of the sector and reduces opportunities for new entrants and people from relatively marginalized backgrounds to enter the industry.

As one interviewee puts it:

> *"Depending on networks means a constant struggle to find the right people and young talent misses out... we need more structured processes for both talent development and recruitment"*
> (Interviewee – creative industries intermediary).

Other than the limited survey results suggested, however, more formal mechanisms like recruitment agencies and job platforms do have a role to play for the smaller ventures in the fashion sector. The reasons are most likely to be rooted in more limited managerial capacities and their different level of connectedness compared to the larger and upscale brands in the sector. This is important information because it implies that the respective services could target smaller brands and possibly start-up fashion businesses as their primary clients and develop more focused or tailored recruitment services. Secondly, the importance of the role of the independent matchmaker is underlined by this finding: be they organized as private sector entitites or public services, there is an objective need, and most likely also some form of demand that may be tapped for cost sharing (if cost recovery is deemed as secondary condition in order to ensure sustainability of such services if this is socially acceptable).

[115]https://lagosfashionweek.ng/video-series/fashion-business-series
[115]https://www.bigafricasummit.com/

How staff is found by employers	Qualification
Advertising on my own website	[fifth rank in the online survey]
Approaching skills or education providers	third-most important item for larger or more upscale brands [sixth rank in the online survey]
Family networks	[fourth rank in the online survey]
Job fairs	[ninth rank in the online survey]
Job platforms	most important item for smaller brands [seventh rank in the online survey]
Newspaper or trade advertising	[last rank in the online survey]
Other	[second-to-last rank in the online survey]
Professional networks	most important item for larger or more upscale brands [third rank in the online survey]
Recruitment agencies	second-most important item for smaller brands [eighth rank in the online survey]
Social media	third-most important item for smaller brands [second rank in the online survey]
Word of mouth or personal recommendations	second-most important item for larger or more upscale brands [first rank in the online survey]

T.20 How staff is found by employers in Nigeria's fashion industry (maximum 4 choices).
Observation: Alphabetical order.
Source: Validation workshop discussion of online survey results of fashion businesses.

While the transition from education to work does not appear to be well organized, larger and upscale brands have mentioned that they are actually turning to providers of skills and education to find people they can work with. If this practice is more widely spread, it may possibly provide a basis for launching or developing more systematic and structural links between the provision of skills and the demand side. Fashion industry employers could inform education and skills providers of their requirements and thus influence the development of the curricula of the providers to their expectations.

Although such processes need some investment in discussion (e.g. drawing up or updating curricula, introducing updated or new job profiles, defining exam criteria), the return is usually very tangible within a reasonable period of time and will ultimately reduce the efforts (cost) of finding suitable staff for all of the businesses in the sub-sector.

8.2 Games development / esports sub-sector

Like in fashion, we also asked businesses in this sub-sector how they usually find the people they need to employ to get the work done. We offered a broad selection of methods available in Nigeria in order to see how respondents in the games development and esports sub-sector ranked specific pathways to recruitment.

Professional networks	Social media
Word of mouth or personal recommendations	Family networks
Approaching skills or education providers	Job fairs
Advertising on my own website	Other
Recruitment agencies	Newspaper or trade advertising
Job platforms	

T.21 How staff is found by employers in Nigeria's games development / esports industry.
Source: Validation workshop discussion of online survey results of games development / esports businesses. Observation: Order by ranking (more important first) resulting from validation workshop discussion.

The results of this exercise were presented for debate at the validation workshop, resulting in a slight reordering of the ranking of the priorities as displayed in the table above.

The most important ways utilized to find employees were professional networks, word of mouth and personal recommendations. This is followed by approaching skills or education providers and advertising on their own websites. The strong importance of professional networks does demonstrate a growing formalization in the Nigerian games development and esports sub-sector, with companies leveraging professional and reputable sources to reach talent.

Contact between businesses and education providers appear to be more frequent than in fashion. If such links do exist for many of the firms, they may possibly be an important starting point for a more structured dialog on shaping qualifications according to business needs.

Family networks are not a major consideration, though a few may recruit family members who may not be the best choice available in a trade-off between wage to be paid (lower to family member) and results obtained.
Job platforms, social media and job fairs play a very limited role.

9. CONCLUSIONS AND RECOMMENDATIONS

Major learning points regarding employment in the creative industries

- The fundamental key for developing creative industries is to recognize their variety. While creative industries often resemble a catch-all phrase for anything that corresponds to popular ideas of what could be labeled ‚creative' (and possibly ‚cultural'), this masks the substantial differences that exist between the different sub-sectors that are commonly identified to pertain to this aggregate, and calling creative industries the ‚orange economy' only adds an additional layer of distraction.

- Strategies which focus on supporting the whole are therefore likely to fail because they do not dovetail with the real development needs of the sub-sectors. Successes are likely to be accidental. At the same time holistic concepts may be required to encourage growth in these sub-sectors and thereby contribute to developing the whole, whatever 'the whole' of the creative industries may represent in any given country context.

- Much time and effort is spent on collecting information on the creative industries and many countries have invested in establishing specific taxonomies for the creative industries. These can be useful for better describing and analyzing the phenomenon and refining the discussions, or when taking political decisions which activities to support. When it comes to promoting employment in the creative industries, however, what really counts are occupational statistics which answer the question what kind of jobs people are occupied with.

- These occupational statistics follow international standards and therefore are comparable. They are being collected on a regular basis in a majority of countries and therefore do not require setting up a whole new set of statistics (a costly enterprise). They generally include all occupations we associate with creative industries, and they can be modified and updated to include new kinds of occupations where necessary (which is less costly than setting up specific creative industry statistics).

- Especially in lower income countries, it is important to strengthen existing statistics and not to add additional information and data collection burden. In Nigeria we have found that occupational statistics do not exist at the level of resolution that would be optimal for our purpose (4 digits), but we were able to get reasonably close (3 digits) and estimate the magnitude of employment in the creative industries. Our research has generated interest in pursuing more detailed analysis with our interlocutors at the NBS because the approach was practical and will generally be feasible (manageable). This is a first step to sustainable data collection on the creative industries.

- We have found that researching two sub-sectors helps us to see the differences and will help us and/or stakeholders to formulate practical approaches for developing them. At the same time this has increased the volume of work substantially because it implied delivering three ELSs simultaneously (on the same budget) as opposed to one: 'fashion', ‚games development / e-sports', and ‚creative industries'. This approach is fine for exploratory purposes but cannot constitute a standard approach to implementing ELS in the creative industries. ELS in the creative industries should target a specific sub-sector for proper focus and quicker results. ELS on creative industries as a whole should be an exception: either for a scoping exercise (e.g., which sub-sectors are of interest) or for small countries with small numbers.

- Informality is a widely spread feature in creative industries for a number of reasons, i.e., not only in countries with large informal sectors. This requires flexible approaches during implementation. Depending on the sectors and the conditions on the ground, visits to informal operators may not always be welcome, and can also be costly if they do not cluster. Forced into online procedures by the pandemic, we have discovered that not only did many interlocutors get used to this format of communication, but that many creatives have a special preference for going online. It corresponds to their lifestyle, and online discussions therefore can be quite effective.

- The apparent popularity of engaging with creative industries is leading to donor fatigue, at least in Nigeria. We have had many interlocutors who questioned the benefit of giving another interview to a donor related effort (the undertone being this is only stealing their time and does not improve their situation). We need to remember the cost of our ELS are not only accruing at our end, but also with our interlocutors who need to run their businesses, many of whom in order to survive and not necessarily out of choice. Also, creative industries may not be as large as we imagine, and the likelihood that key informants in these industries will be interviewed by several parties therefore is bound to be high.

- ELS work with what information is available and can be processed in a limited amount of time. To the extent that information on the creative industries is not readily available, information can be generated, but there may be limitations regarding the results that can be expected because generation of information is more time consuming than collection. Sectors which are more established and organized are more easily analyzed than sectors which are less organized and operate in the informal sector. This needs to be anticipated when planning the resources required for an ELS.

Opportunities to be developed

The Nigerian creative industry as garnered a lot of global acclaim in recent time especially the film, creative writing and music sectors thereby raising the potential for investment and promotion. The success of these sectors can be leverage upon to serve as a way for employment and revenue generation through structuring, management and distribution of creations across the world.

- Digital technology provides creatives with a better platform to promote their works and is fast becoming a new norm for exchanging products, there is an opportunity for creatives to increase revenue from digitalization of their creations thereby reducing associated cost and increasing revenue.

- The creative industry offers Nigeria a viable and more sustainable alternative means for foreign exchange, the more reason for immediate review of redundant laws and policies and implementation of plans and promises. This should be considered in the area of funding, capacity building, review of copyright laws and collaboration with international organization.

- There are enormous opportunities if the TVET is properly harnessed and the challenges are addressed. In 2020, the National Skill Council (NSC) was inaugurated to create strategies to bridge the skills gaps among youths in Nigeria. This council operates within the ministry of education created around the TVET ecosystem. TVET is an important instrument for economic development when adequately harnessed by integrating technical education into the standard curriculum of elementary and tertiary institutions. This provides an avenue for creativity and relevant skills to start off as job creators and not job seekers. Providing incentives for private sector practitioners to fully participate in delivering training programmes and the management of facilities would contribute to the achievement of the goals and objectives of the TVET scheme across Nigeria. It will affect the performance of all creative industries that employ elements of specific crafts, but can also include any new vocations.

- The film, fashion, art and music industry is sporadically gaining international attention, however, the individualism of these sectors move them to thrive more with lesser input and impacts from the government. A total break from the old approach of production requires complete backing and support from the government in the acquisition of bigger budget productions.

- Collaboration and co-creating production amongst sectors with similar visions. There is greater prospect for success, a greater job creation and a wider consumer reach when creatives collaborate. The film, music and writing sectors in Nigeria are gaining increasing recognition, which can be used to bolster other sectors when partnerships and agreements are reached for reaching their goals and target audiences.

- Nigerian creatives also need to find more innovative ways to promote their works in order to command more global attention, they need to leverage more on the digital environment to exchange their works.
- Building links between sub-sectors, e.g. film and the emerging games development industry (characters and stories of films transferred to games) and fashion sectors by adding new layers of diversification and market penetration (e.g. merchandising).
- Nigerian literature and creative writing have the potential to bolster development, at the local level, Nigerian historical literature can be fitted into children's books with short stories and pictures instead of having a book on "beauty and the beast", we could have a depiction of the Nigerian independence as a story book for print, or a storyboard for film, series, or games.

- Also, in the area of making Nigerian literature into movies, film, game, and fashion adaptations of books could also command global attention with a great display of the Nigerian arts and culture through costumes and set displays.
- Policy attention for the creative industries in Nigeria is not only based on an assessment of the opportunity for growth and value-added from the sector. It is also based on an awareness of the structural challenges facing the creative industries, from the education sector through to access to finance and investment, regulatory aspects and a host of other barriers to development.

Summary of challenges and their relative importance to employment generation

This ELS for the Nigerian fashion and games development / esports sector is illustrative of the overall strategic opportunity to develop and grow the creative industries as a provider of employment for the nation's youth. However, as described in detail, these creative sectors face a mismatch between the provision of labour and talent and the demand for labour and talent. There are too many skills gaps, the sector remains overly informal and dependent on social networks and word of mouth for recruitment, and provision of tertiary and higher education is limited, especially with regard to the specialist skills and competencies required. Add to this a wider set of barriers to development (from copyright infringements to power cuts, political instability to copyright infringement), and there is no single superhighway for creative industries growth.

- Addressing wider structural issues: Wider structural issues include, e.g., copyright infringement, weak industry bodies, lack of clustering, distribution and infrastructure (such as lack of cinemas and venues). Without an uplift across these areas, mobilised by federal and state policy and investment and

underpinned by public-private partnership, skills and education issues are unlikely to be resolved. This is why, for example, industry leaders, recognizing the interdependence of skills, investment and infrastructure, are advocating for an effective Creative Economy Policy Framework.

- Working with holistic concepts: There is also a need to upskill the existing creative workforce, e.g., to build digital skills and facilitate continuous professional development while at the same time working in partnership with industry (Nigerian and international) to co-design skills frameworks and achieve a balance between formal and informal learning pathways and while at the same time developing hubs or clusters jointly with local government support. Partial solutions are likely to fall short if not fail unless they are part of a more encompassing approach.
- Providing access to marketplace: There is a need to work on provision of marketplace access for those in the games development and esports and fashion industries, especially to address the challenges of a fragmented ecosystem which has ramifications as to how those in the sectors are able to access local, national and international markets.

Possible options and approaches for Nigeria to take up the challenges

The recommendations have been prepared based on the findings from the stakeholder validation workshop with a focus on practical and implementable activities that can address the prioritized challenges and gaps in the fashion and games development / esports sectors of the creative industries in Nigeria.

- **Standardise and formalise (toward skills frameworks):** This can adapt international best practice frameworks. This is an extensive task, so the selection of targeted pilot activities would be a sensible first step, e.g., designing qualifications for specific sub-sectors (such as fashion and games development / esports). There is also an opportunity for adjusting curricula (from school to university) to at least ensure sufficient arts and digital skills and some skill related to harvesting creativity are included.[117] Proposed job profiles for modern jobs in the two sub-sectors could also be a starting point for experimentation with adaptation.

- **Specialise and target:** Nigeria appears to have some specific strengths, e.g., in film, fashion, performing arts, and genuine innovation in digital. Yet for each specialty there is a major skills gap, e.g., screen-writing for film or business management for fashion designer-makers. In games development and esports there are similar challenges which from a national employment perspective may be more grave because the jobs created in these sub-sectors may be also filled by substituting with talent from abroad given tasks can be shifted across borders between computers. Targeted skills programmes for priority sectors could provide some quick wins and accelerate the process toward a more structured approach to the definition and delivery of quality skills. International partnerships may also enhance the identification and introduction of best practice and initiate long-term partnership opportunities. Specific (and very diverse) opportunities cited by consultees include fashion and technology and script writing for digital storytelling.

- **Build industry networks, hubs and skills match platforms:** The lack of information on available courses (and their quality), and the lack of a sector-focused approach to career development and recruitment mean that neither industry nor skills providers are sure of the quality of the skills offered by prospective employees (or creative talent). A dedicated approach to promoting creative skills and advertising opportunities for employment would help to build a network and possibly also database approach to matching skills needs to talent, and to identifying skills gaps as they arise. Key creative businesses can play a leadership role here in designing and setting up a skills match platform for Nigeria. In addition, by building professional networks and creative hubs (where creative businesses co-locate and are supported in skills and entrepreneurship) can facilitate greater knowledge exchange and build a community of practice through which both formal and informal continuous professional development can take place.

- **Incentivise apprenticeship and internship activities:** Currently, internships in Nigeria are relatively informal, mostly unpaid and tend therefore to perpetuate the lack of structure and professionalism which blight much of the creative industries. Piloting programs of internships with university and industry partnership could enable internships to be an important and accredited part of the skills mix. As is the case for a number of hard skills sought by the fashion industry, for vocational and technical skills, paid and accredited apprenticeships would go a long way to bridging skills gaps. It is likely this is also holds for vocations in further creative sub-sectors.[118]

- **Focusing on inclusive, ethical creative industries development:** Gaps in opportunity and skills are not uniform, with many millions of young people living in poverty and unable to access even the most basic skills and development support. Interventions need to find a balance between delivering short and medium-term outcomes powering industry leaders and at the same time move forward on structural change which can impact on the whole talent pool.

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[117]More complex approaches such as STEAM are likely to fail given, they are difficult to implement even in high-income countries. The question of education reform is complex, and integration of different subjects across the board is usually more difficult than advertised.

[118]Apprenticeships are not a model that holds for games development and esports because the standards in these industries are set in international markets and swiftly evolving.

- **Partnership with the National Orientation Agencies** across the states of the federation and partnership with the vocational training centre to develop vocational and skills acquisition centres that provide world class skills development.
- **Partnership with association** such as FADAN to host exhibitions, promote fashion houses of members and provide training for members.

- Information ('data'), however, remains one of the key elements that provides essential inputs for decision-making, will support advocacy capability and be one area of intervention that can be catalytic. Development of data collection strategies will be useful to establish mechanisms that can work with the private, public and third sector stakeholders in the industry, to facilitate, learning, collaboration and reflection.

Specific actions or modalities for debate

- **Targeted entrepreneurship programmes** – e.g., schools for creative start-ups
- **Internship and apprenticeship programmes -** focusing on freelancers
- **Creative hubs -** as beacons of sector development, providing a role in aggregation and network development, also signalling the potential for sector growth at a local level. These can specialise – e.g., hub for ethical fashion, e.g., hub for serious games.
- **Pilot of industry-written courses at tertiary level -** where leading creative MSME work with further-education Institutions and higher-education institutions (HEI) to co-design relevant courses and qualifications
- **Pilot accelerators -** fast-track leading edge young talent and use as a vehicle to promote and validate creative careers
- **A programme of short courses -** co-designed with industry and higher education institutions (HEI) to boost innovation and productivity for early-stage careers in cultural and creative industries

- **Campaign:** on the opportunities for creative employment, the skills needs and viable pathways for market entry, employment and sustainable growth.
- **Provision of creative vouchers** that can be issued by partner organizatons to creatives or budding creatives to provide workspace, business, legal and management support. The workspace could include access to industrial grade machine and world-class equipment.
- **Establishing creative hubs** to expand the ecosystem, which could include online resource centres, opportunities to connect and work with other similar creatives and accessibility to organizations for creative resources.
- **Campaigns for review of intellectual property law** which seems weak and not sufficiently protecting the creatives, especially the movie and music industry.
- **Establishing creative start-ups and digital co-creative hubs** across major cities in Nigeria with liaison office/ centre in Lagos State.

CREATIVE HUBS

The Creative hubs provide an avenue to address issues of access to power supply, places to work, and access to skilled and qualified talent in the industry. They can help to build demand for talent across the creative industries, providing access to networks of creative talent and providing a positive environment where creative work is validated. Creative hubs can also support the delivery of talent supply into the industry, providing a pipeline mechanism where local talent can access an enabling environment which includes training and peer learning.

Creative hubs are a proven model globally,[119] with many countries piloting and then establishing local clusters of creative industries facilities which include access to affordable workspace and equipment, good quality internet connection, and tailored programs of business support, training and investment. Creative hubs are also recognized for the ways they facilitate sector networking, providing a safe physical and digital space for knowledge exchange, collaboration and access to / recruitment of talent.

They may even constitute a center where a bundling the tasks required to change the fashion industry, according to the participants from the fashion sector during the validation workshop, viz. Education, re-orientation, and changing the narrative on career paths and jobs, could be organized and/ or nurtured, in a continuous dialog between the different stakeholders.

The creative hubs model will need to be adapted for the Nigerian environment and have both physical and digital components. They will need to be piloted and the approach refined to fit within the local strategic context and achieve an effective governance model based on public private partnership. They should be positioned as local training and professional development centres, alongside other functions such as affordable workspace, access to modern equipment, and access to professional networks that provide information on jobs, skills development opportunities, marketplace activities. The creative hubs will allow for advantages of economies of scale to be harnessed, provide strong network components that deepen relationships between actors in the value chain, and work to develop an ecosystem that can contribute to innovation, competitiveness and inclusive growth.

The creative hubs should be designed to be sector-specific in a way that provides:

- physical space to work,
- network, collaborate and share ideas that can improve the output of sector agents,
- have a recruitment/jobs announcement component for people to find work as well as meet their business needs,
- provide career path options for the sectors, and opportunities in allied services
- engage in skills development activities providing qualifications and accreditations. The hubs can work to connect and aggregate resources from industry, universities, polytechnics and TVET organizations.

How to implement
Implementation can take place through pilot projects in Lagos, Ogun and Edo States in the first instance, which can then be evaluated and expanded to other parts of Nigeria across the geopolitical zones.

Who to implement
Agencies such as the Lagos State Employment Trust Fund can be engaged with private sector implementing partners.

- The government can contribute to this by providing physical spaces using existing unused buildings that can be repurposed for this use.
- Existing associations such as FADAN can also advise on the hub design and creation.

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[119]Cf. https://creativeeconomy.britishcouncil.org/media/resources/HubsReport.pdf.

The hubs present a way to capture data from the sectors, so sector performance can be measured over time. The hubs can be adapted, drawing on evaluation data of their impact, so they can become flexible models for sector development. The brand value of the hubs will increase the visibility of the creative industries and support the validation of creative jobs as credible careers. In turn, this will stem rural to urban migration, and by so doing, provide strong local creative clusters.

The hubs can also provide the platform for trialling new approaches to sector training and skills development. This can include partnering with schools to support early years creative education; partnering colleges to co-design and deliver industry-ready training; and partnering industry to support continuous professional development.

Local creative hubs can be positioned as part of a national network,[120] presenting opportunities for nationwide knowledge exchange, match-making, collaboration and recruitment. At this scale, each hub can be positioned as a centre of excellence to trial new approaches to training and skills which contribute to a much improved nation-wide approach to both demand- and supply-side considerations.

[119]See the European Creative Hubs Network for precedent: http://creativehubs.net/.

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LIST OF PERSONS MET - (Online meeting)

Name	Organization	Function
Adeyemi Adesanya	HalftimeNG Gaming and Publications Limited	President/ CEO
Akudo-Nwosu, U.N. Mrs	Federal Ministry of Information	Deputy Director
Andrew Esiri	Kon10dr Inc	Manager
Bakare Saheed Olalekan	NBS	Focal Person on Labour Force, Data Analyst
Blessing Ebere Achu	360 Creative Innovation Hub	Managing Director
Fusi Olateru-Olagbegi	British Council	Project Manager – Creative Industries
Hugo Obi	Maliyo Games	Founder
Idigbe Isioma	Punuka Attorneys & Solicitors, International Law Center	Partner
Isah Abubakar	Federal Ministry of Education	Director of ICT
Joseph Ike	Garment Production Inc/ JZO Fashion	Founder
Jumoke Sanwo	Revolving Art Incubator	Creative Director
Kola Kuddus	Fashion Designers Association of Nigeria (FADAN)	President
Nathan Jones	Nathan Jones Studio	Founder

Name	Organization	Function
Nkiru Balonwu	RDF Strategies	Managing Partner
Nta Monday	Federal Ministry of Industry, trade and investment	Director, ICT
Obi Asika	Iba Ajie	Founder
Ojoma Ochai	Managing Partner	The Creative Economy Practice, CC Hub
Omoyemi Akerele	Style House Files	Founder
Onazie Abo Sunday	Federal Ministry of Labour	Head of National Electronic Labour Exchange (NELEX)
Raphael Monday	Federal Ministry of Industry, Trade and investment	
Rimini Makama	Market Expansion- Xbox Cloud Gaming (Project xCloud) Microsoft	Market Lead SSA
Rukky Ladoja	Grey Projects	Founder
Sidney Esiri, Dr	Kon10dr Inc	Founder
Yemisi Mokuolu	Hatch Africa	CEO
Zara Odu	Designers Consociates	Creative Director