EMPLOYMENT AND LABOUR IN THE CREATIVE INDUSTRIES

NIGERIA

Final Report Annexes (updated)

Project: Skills Initiative for Africa (SIFA)

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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	Aftican 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

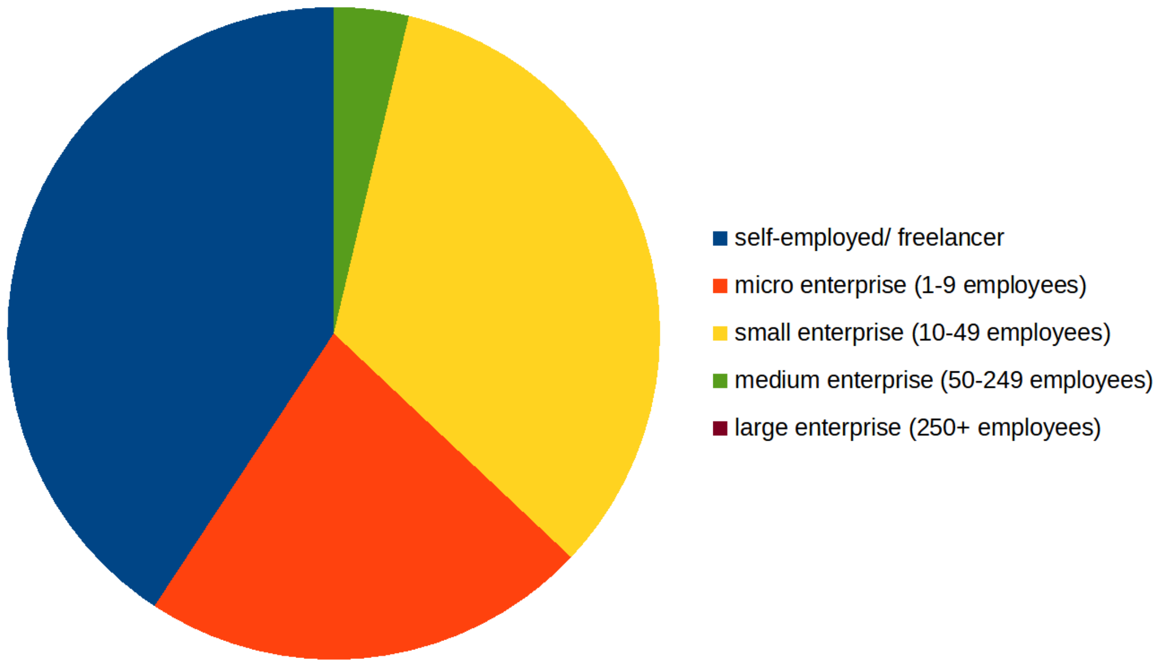
SWOT	Strengths, Weaknesses, Opportunities, Threats (chart)
TVET	Technical and Vocational Education and Training
UIS	UNESCO Institute for Statistics
UK	United Kingdom
UN	United Nations
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Program
UNESCO	United Nations 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

Annex 1: Sample structures of online surveys (small samples of convenience)

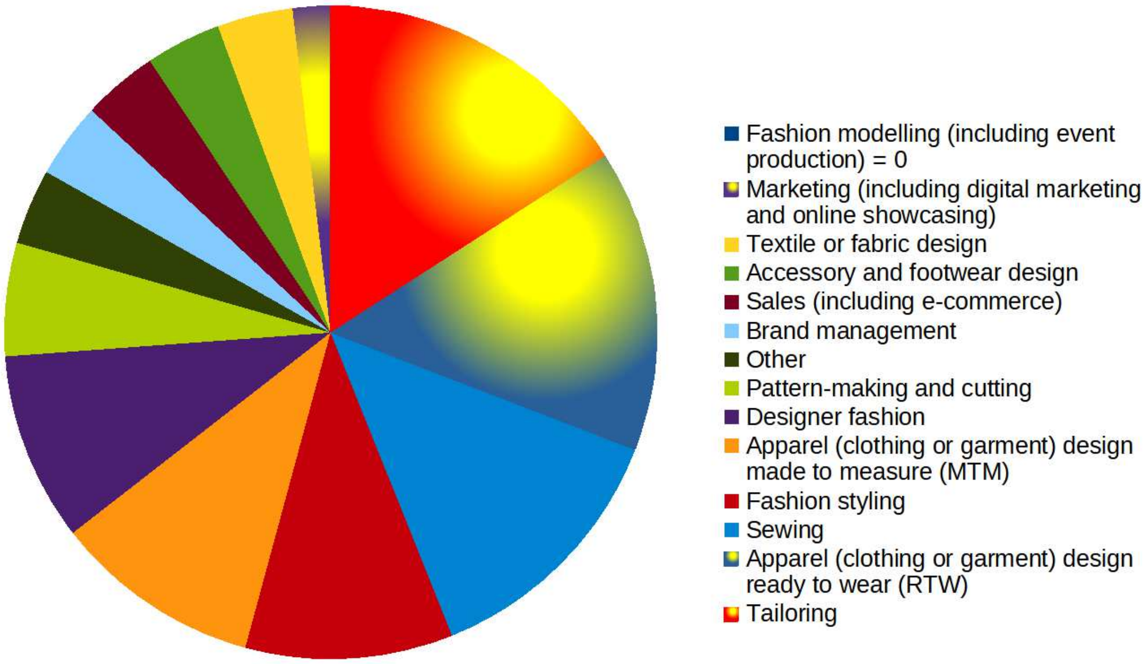
Given the difficulty of gaining access to larger numbers of interviewees in the two sub-sectors, both for reasons of interviewee fatigue, weariness of external inspection, and lack of interest in communicating trade secrets, we had opted for trying out an online survey because of its more anonymous nature in order to place a few key questions that could help us to better understand the situation in the two sub sectors. While the number of responses were limited, the survey served the purpose by substantially enriching the report with more comparable illustrative information.

This section provides an overview of the structure of the businesses that have responded and provided their anonymous information.

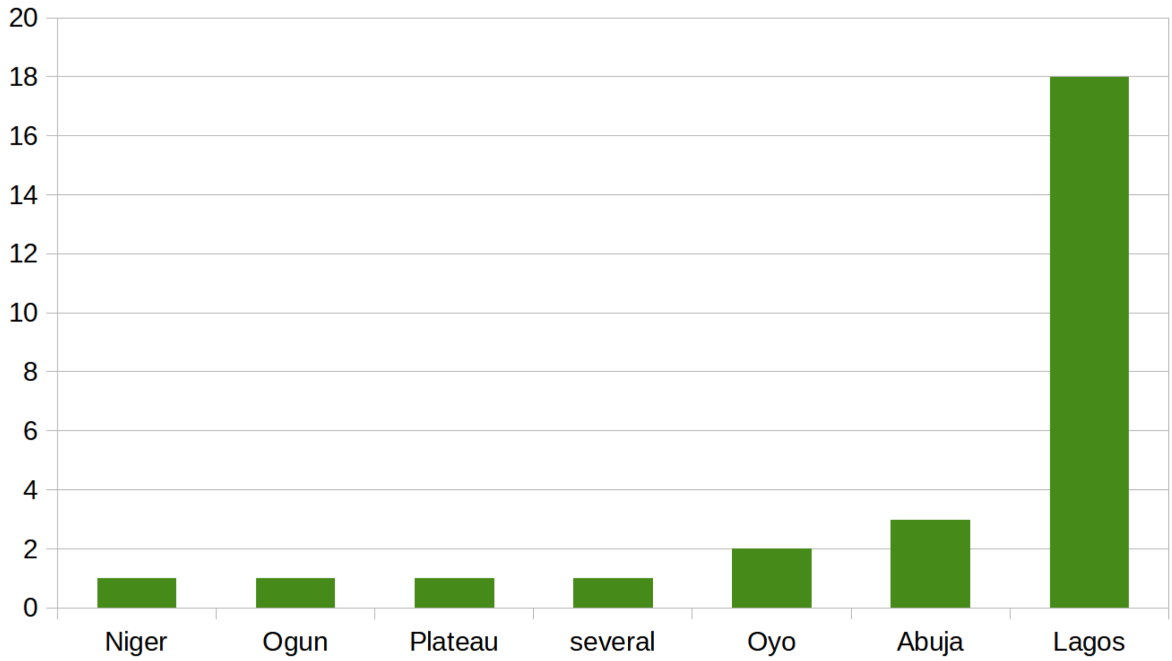
Fashion sub-sector



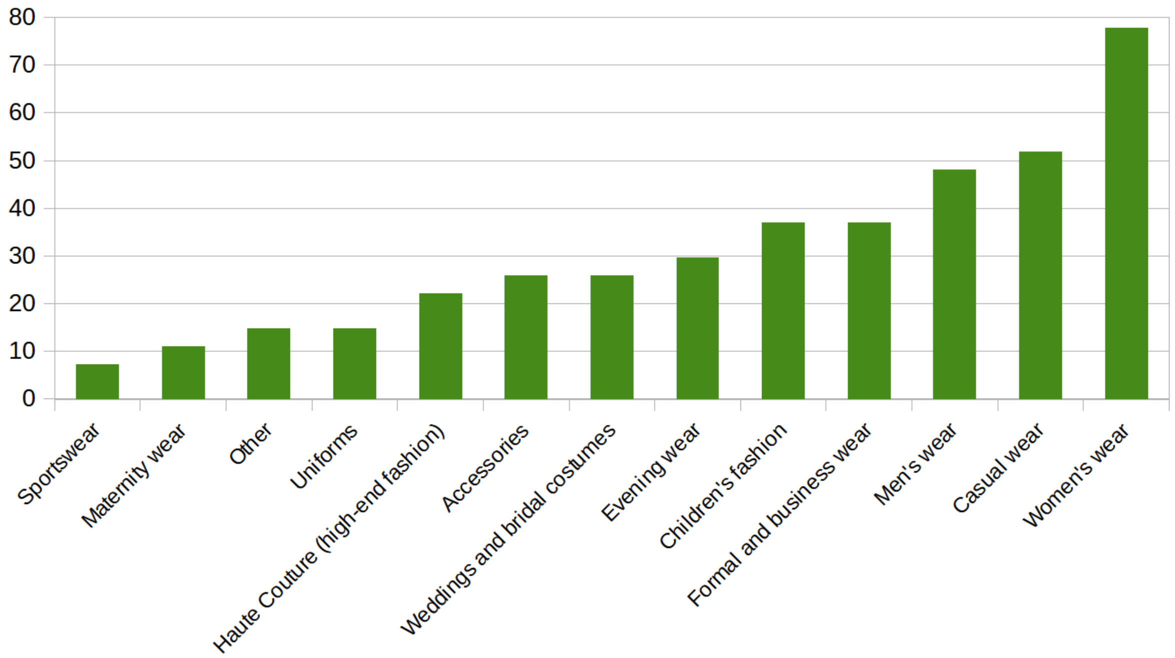
G.A01 Structure of sample in fashion (business size).
Source: Online survey of fashion businesses, n = 27.



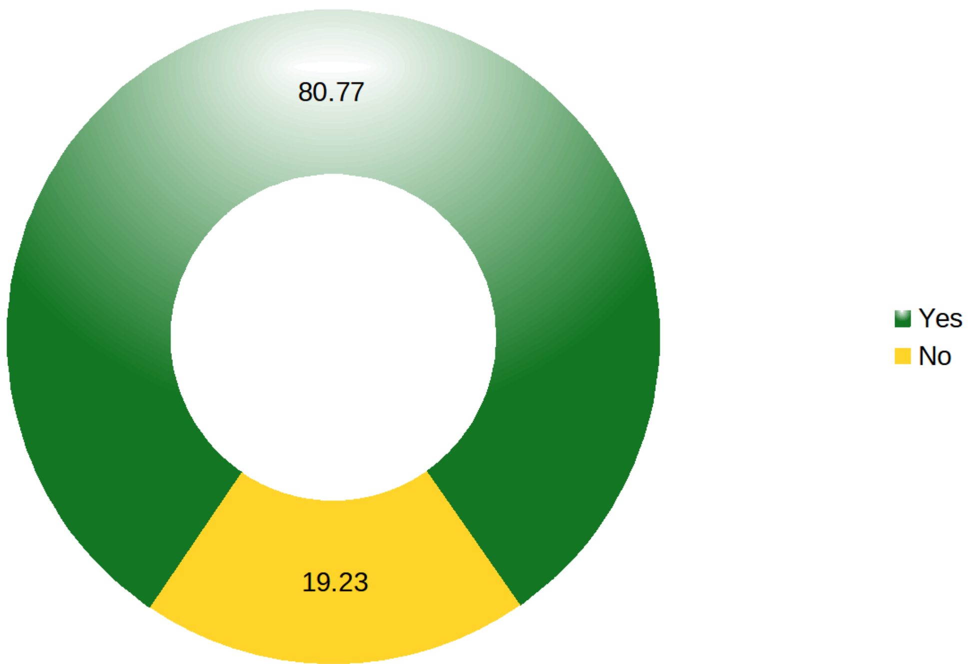
G.A02 Structure of sample in fashion (business specializations, maximum 5).
Source: Online survey of games development / esports businesses, n = 27.



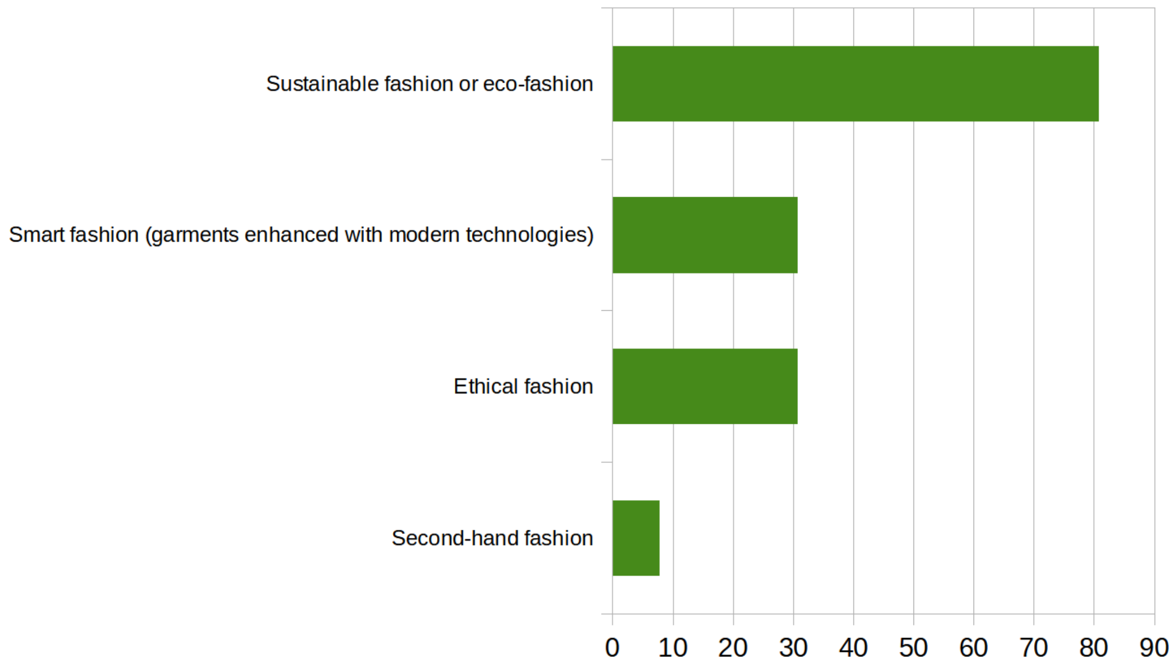
G.A03 Structure of sample in fashion (business location).
Source: Online survey of fashion businesses, n = 27.



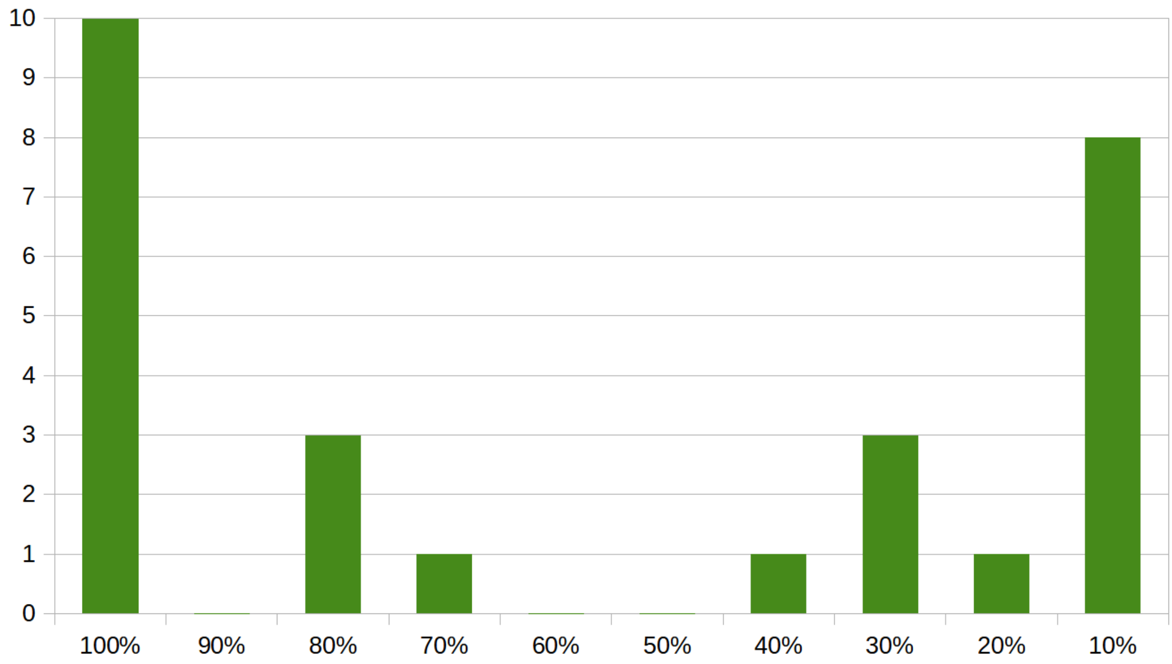
G.A04 Structure of sample in fashion (style specializations, maximum 5).
Source: Online survey of fashion businesses, n = 27.



G.A05 Structure of sample in fashion (fashion with Nigerian or African story or aesthetic, Y/N).
Source: Online survey of fashion businesses, n = 26.

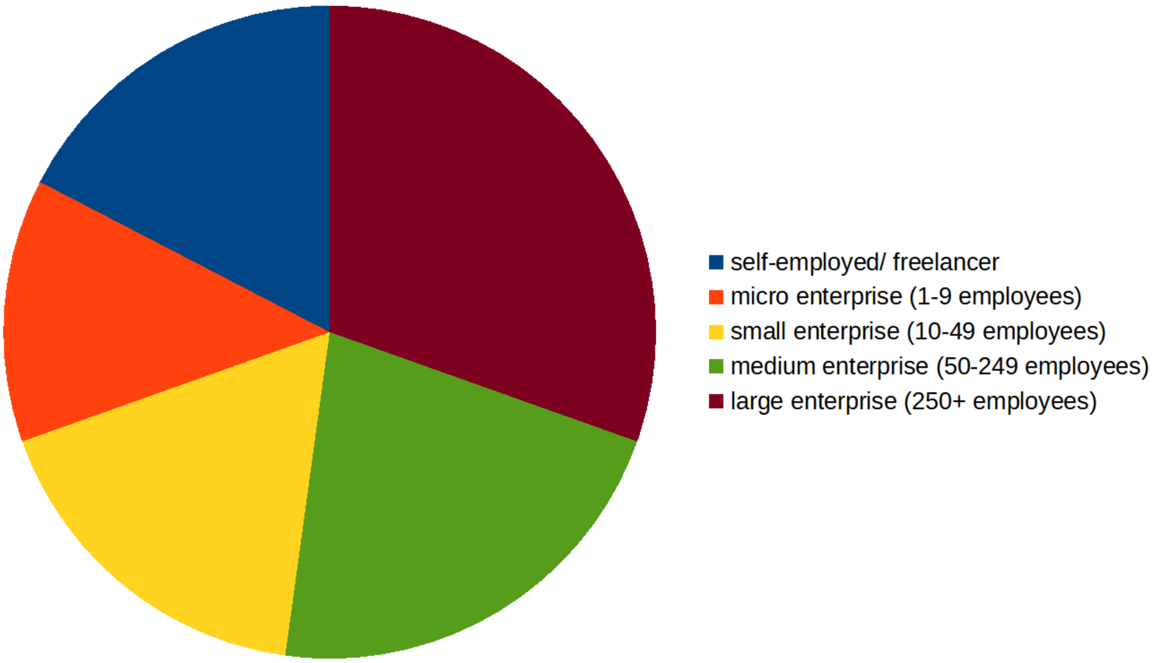


G.A06 Structure of sample in fashion (pertaining to modern market segments).
Source: Online survey of fashion businesses, n = 26.

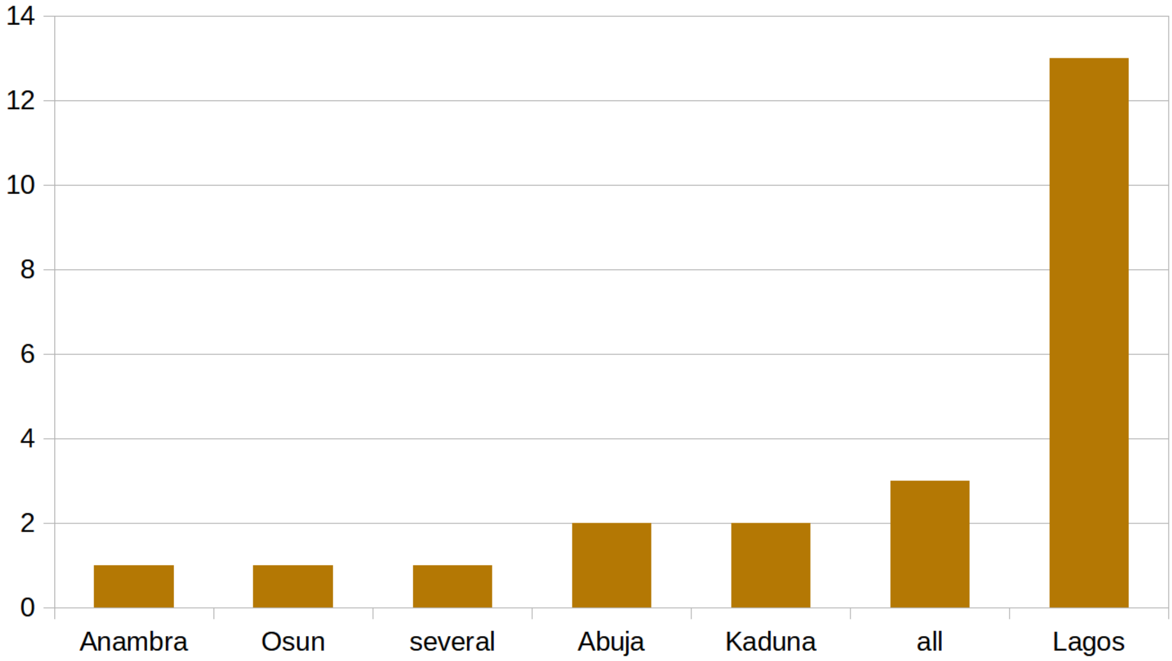


G.A07 Structure of sample in fashion (share of your market in Nigeria, choose one).
Source: Online survey of fashion businesses, n = 27.

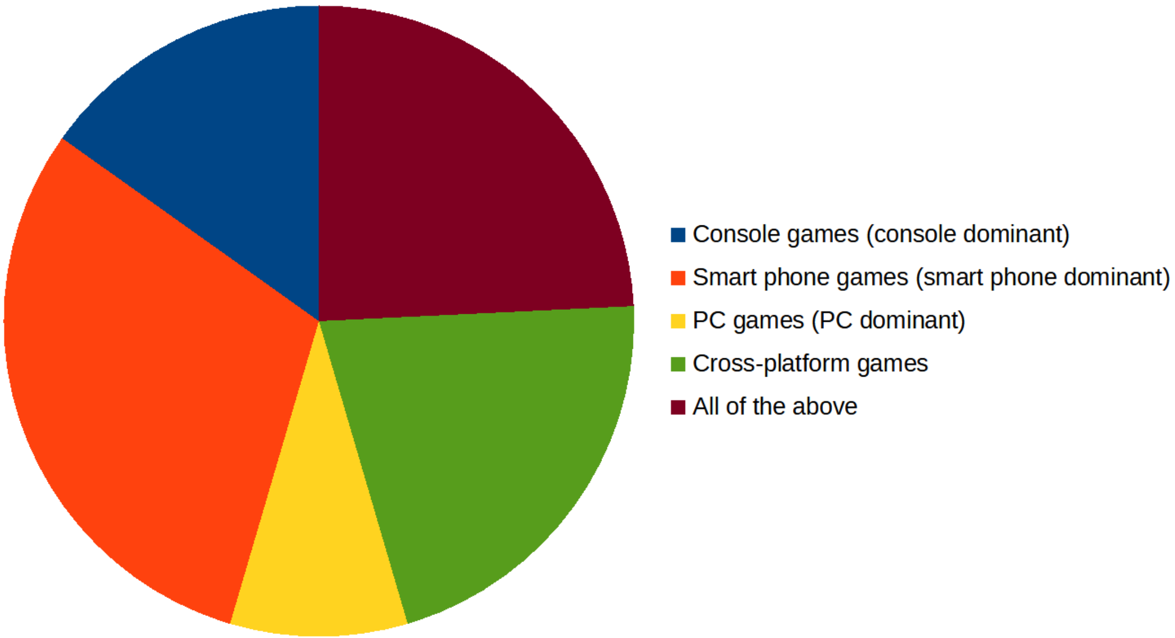
Games development / esports sub-sector



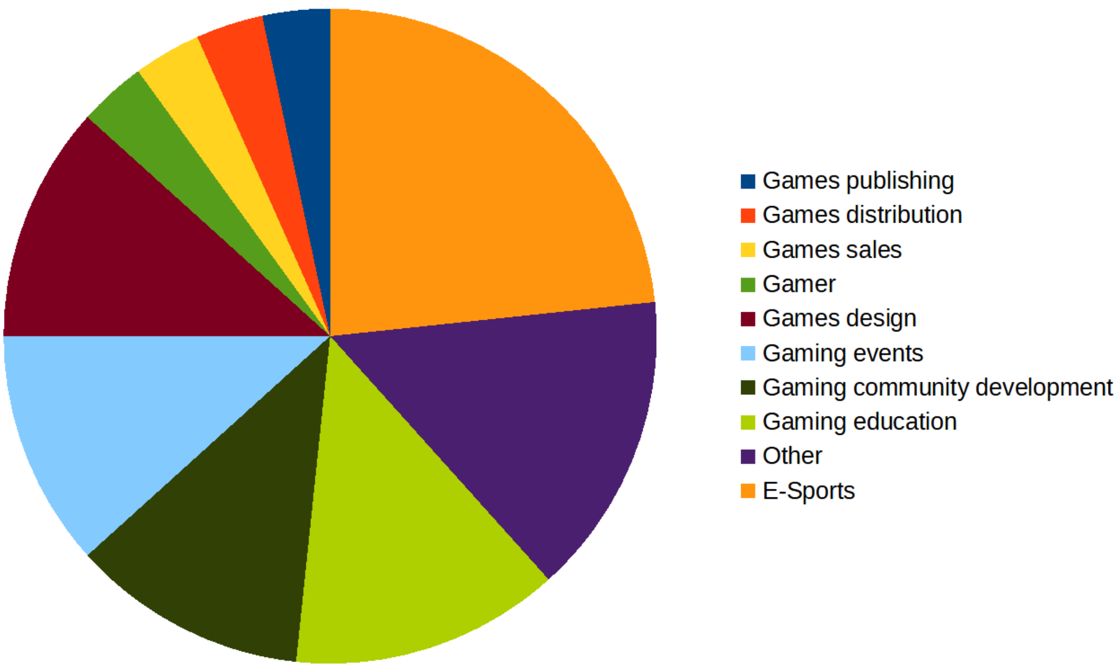
G.A08 Structure of sample in games development / esports (business size).
Source: Online survey of games development / esports businesses, n = 23.



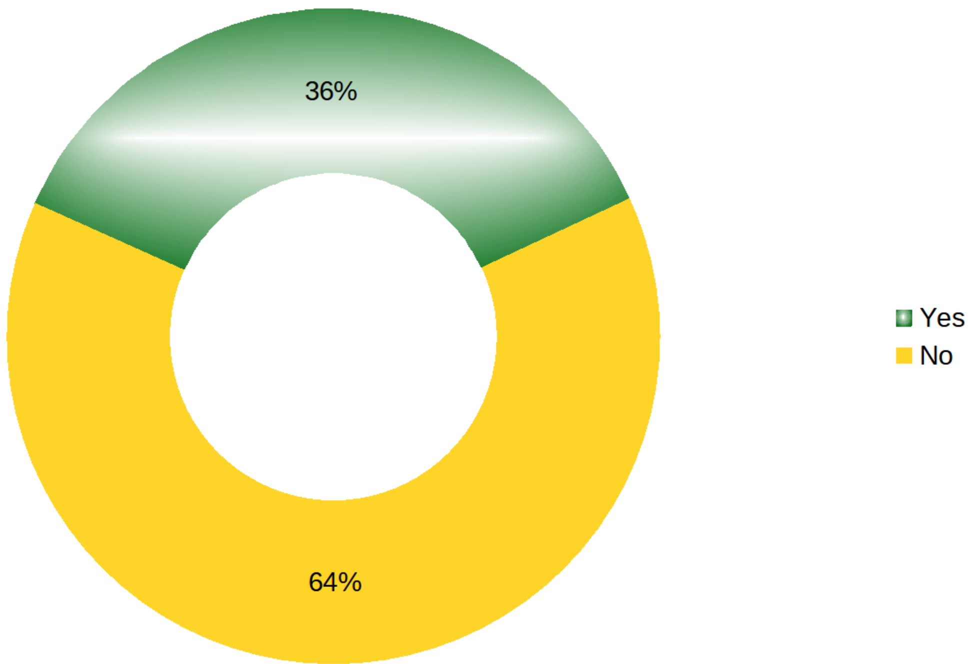
G.A09 Structure of sample in games development / esports (business location).
Source: Online survey of games development / esports businesses, n = 23.



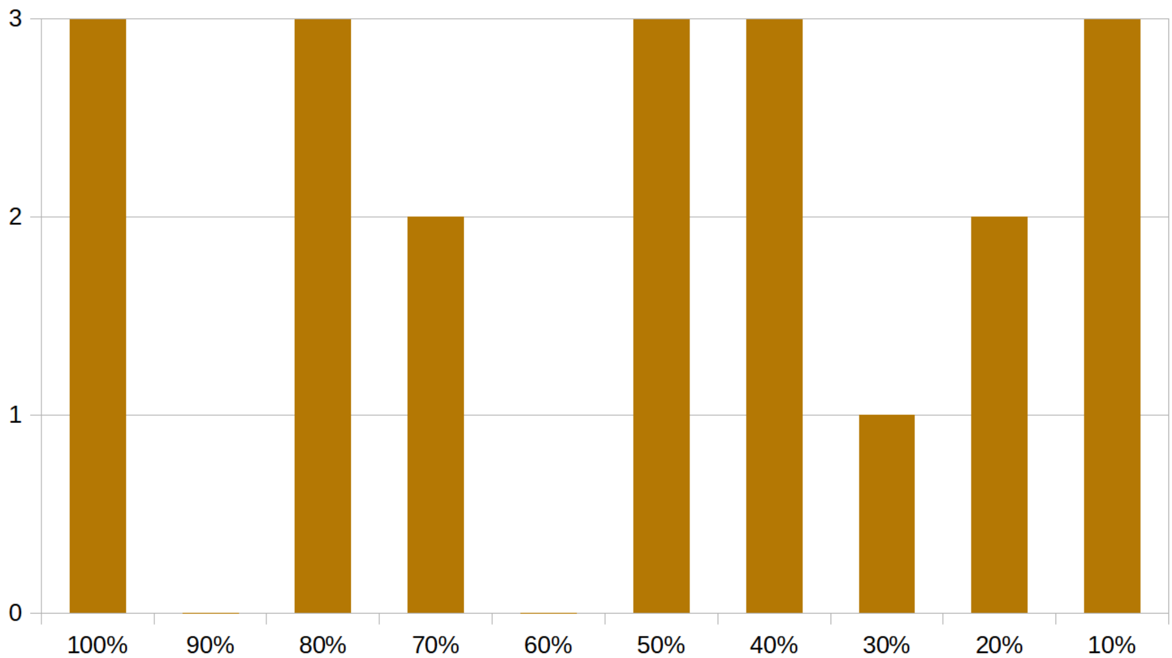
G.A10 Structure of sample in games development / esports (platform focus).
Source: Online survey of games development / esports businesses, n = 22.



G.A11 Structure of sample in games development / esports (business specializations, maximum 5).
Source: Online survey of games development / esports businesses, n = 23.

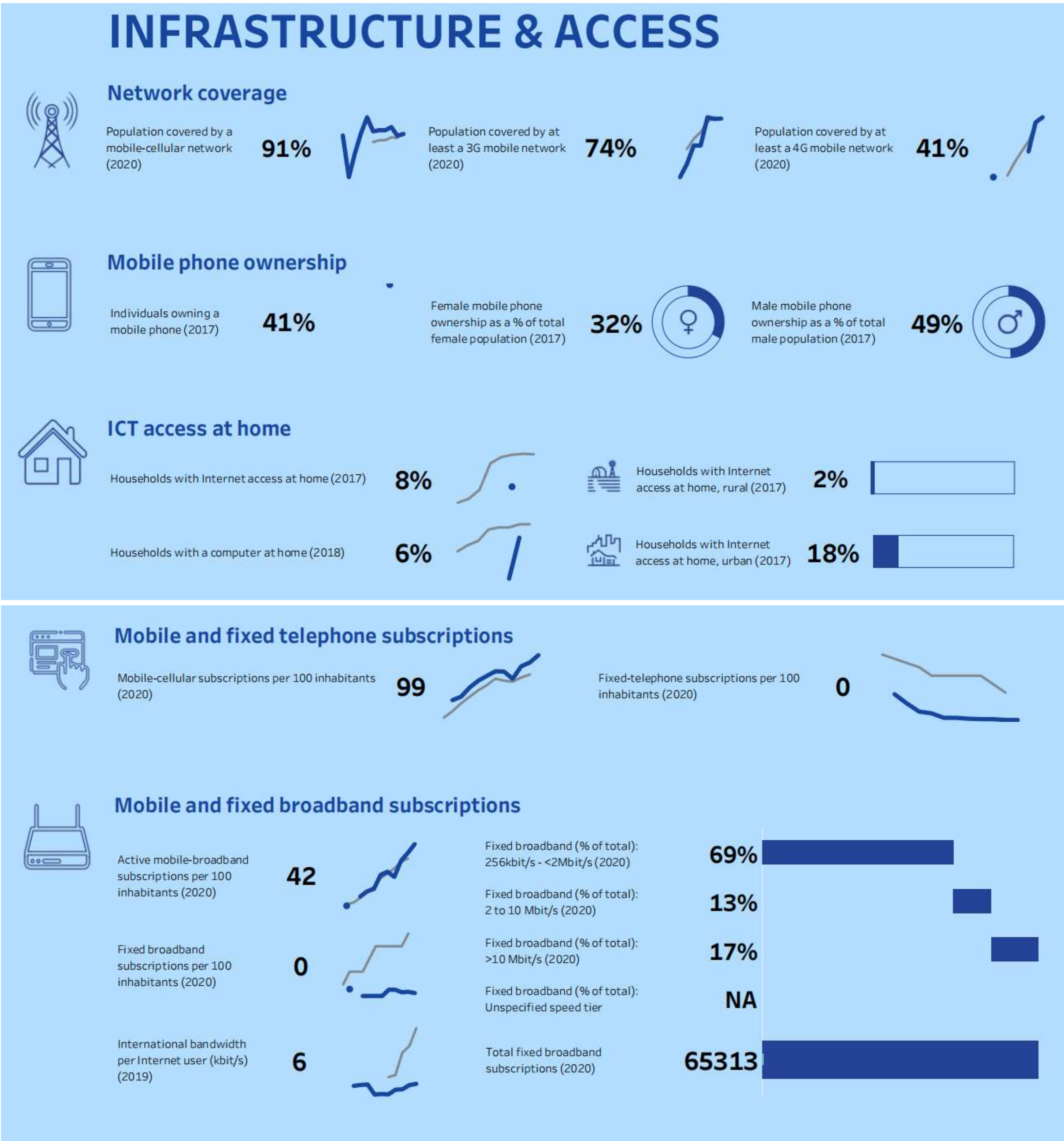


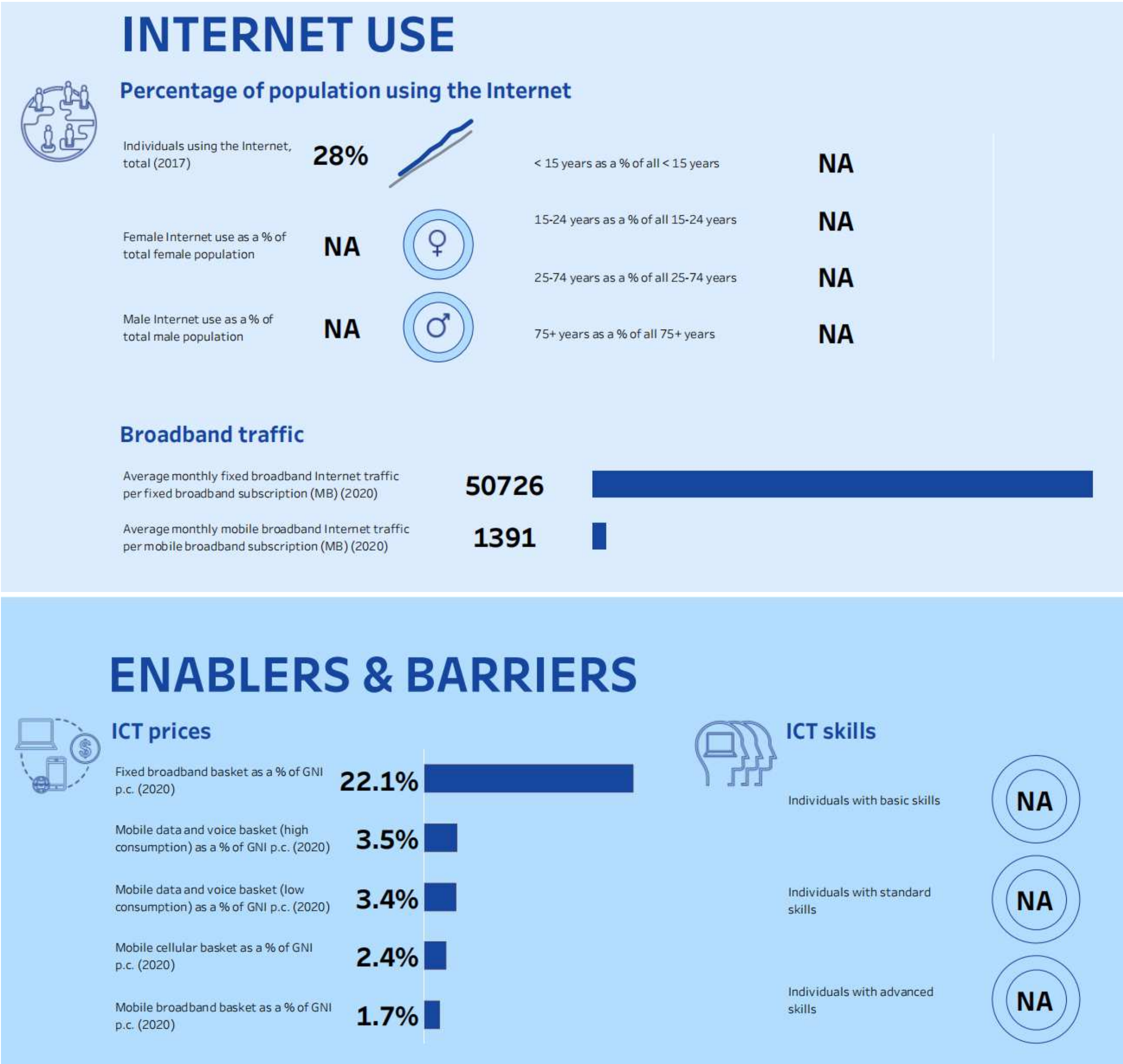
G.A12 Structure of sample in games development / esports (games with Nigerian / African story or aesthetic, Y/N).
Source: Online survey of games development / esports businesses, n = 22.



G.A13 Structure of sample in games development / esports (share of your market in Nigeria, choose one).
Source: Online survey of games development / esports businesses, n = 20.

Annex 2: ITU digital development dashboard Nigeria





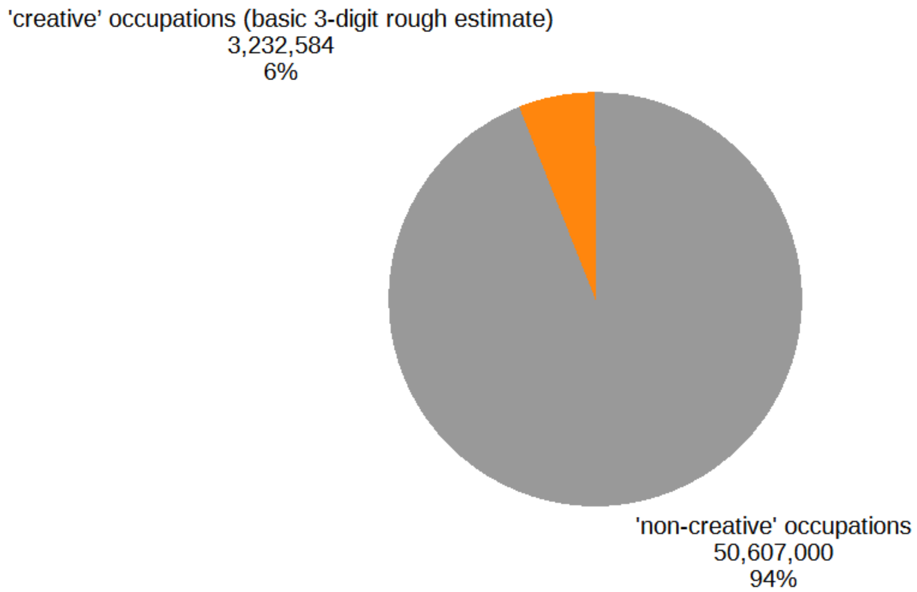
Source: https://www.itu.int/en/ITU-D/Statistics/Dashboards/Pages/Digital-Development.aspx.

Annex 3: Estimating employment stock in the creative industries in Nigeria 2019

The following rough estimate for employment stock in the creative industries is based on preliminary data generously and confidentially provided by interlocutors at the National Bureau of Statistics of Nigeria. They are extracted from labour force survey data of 2019.

Because the resolution at which the data is currently being collected is only at a 3-digit level, and not at 4-digit level, accuracy is not as high as it would usually be. We have made assumptions about the shares of persons occupied in the creative industry for some broader categories of occupations that do not only exist in the creative industries. These assumptions are specified further below and may be modified if more specific information about the respective ‚creative' shares allows for more accuracy.

Based on our estimate, Nigeria's creative industries currently employ roughly 3.2 million persons if all creative occupations are included and shares of more generic professions like salespersons added. The non-creative economy absorbs roughly 50.6 million individuals. Therefore, the ‚creative' share amounts to roughly 6% of total employment.



G.A14 Share of creative economy employment in Nigeria 2019 (rough estimate).
Source: Own calculations based on 3-digit labour force data provided by NBS, drawing on LFS for Q1 2019.
Observation: Confidence intervals in the range of +/- 6-7% for the whole sample.

ISCO 08 Code	Occupations	Persons	Observation
122	sales, marketing and development managers	422,503	100%, all 4-digts typically included usually considered key CI sub-sector
133	ICT service managers	8,534	10% because ICT element is relevant and connected to CI
143	other services managers	221,360	100%, 1431 usually considered part of CI and 1439 may cover CI otherwise absent
216	architects, planners, surveyors and designers	83,758	95%, 2164 and 2165 usually not considered part of CI
243	sales, marketing and public relations professionals	91,814	100%, all 4-digts typically included usually considered key CI sub-sector
251	software and applications developers and analysts	720	5% because games development / esports still at infant industry stage
252	database and network professionals	254	2% because games development / esports still at infant industry stage
262	librarians, archivists and curators	6,032	100%, all 4-digts typically included usually considered key CI sub-sector
264	authors, journalists and linguists	13,724	80%, 2 out of 3 4-digts included usually considered key CI sub-sector
265	creative and performing artists	114,171	100%, all 4-digts typically included usually considered key CI sub-sector
333	business services agents	27,516	10% for 3332 usually considered as part of CI plus a share of 3339
342	sports and fitness workers	24,955	100%, depending on classification the typical 4-digts may be considered part of CI
343	artistic, cultural and culinary associate professionals	33,520	100%, at least 4 out of 5 4-digit categories typically included are considered key CI sub-sector
351	ICT operations and user support technicians	565	2% because games development / esports still at infant industry stage
352	telecommunications and broadcasting technicians	6,963	30% for 1 out of 2 4-digits, 3521 broadcasting and audio-visual technicians
514	hairdressers, beauticians and related	928,934	100%, depending on classification all 4-digts may

ISCO 08 Code	Occupations	Persons	Observation
	workers		be considered part of CI
524	other sales workers	27,015	5% for 1 out of 7 large categories: 5241 fashion and other models
731	handicraft workers	233,119	100%, all 4-digts included usually considered CI
732	printing trades workers	77,775	100%, all 4-digts included usually considered key CI sub-sector
753	garment and related trades workers	396,426	80%, 3-4 out of 6 4-digts may be considered CI
754	other craft and related workers	40,224	5% (speculative) for 1 out of 5 categories: 7549 craft and related workers not elsewhere classified
815	textile, fur and leather products machine operators	472,702	100%, all 4-digts may be considered part of key CI sub-sector
	Total ‚creative sector'	3,232,584	

Source: Own calculations based on 3-digit labour force data provided by NBS, drawing on LFS for Q1 2019.

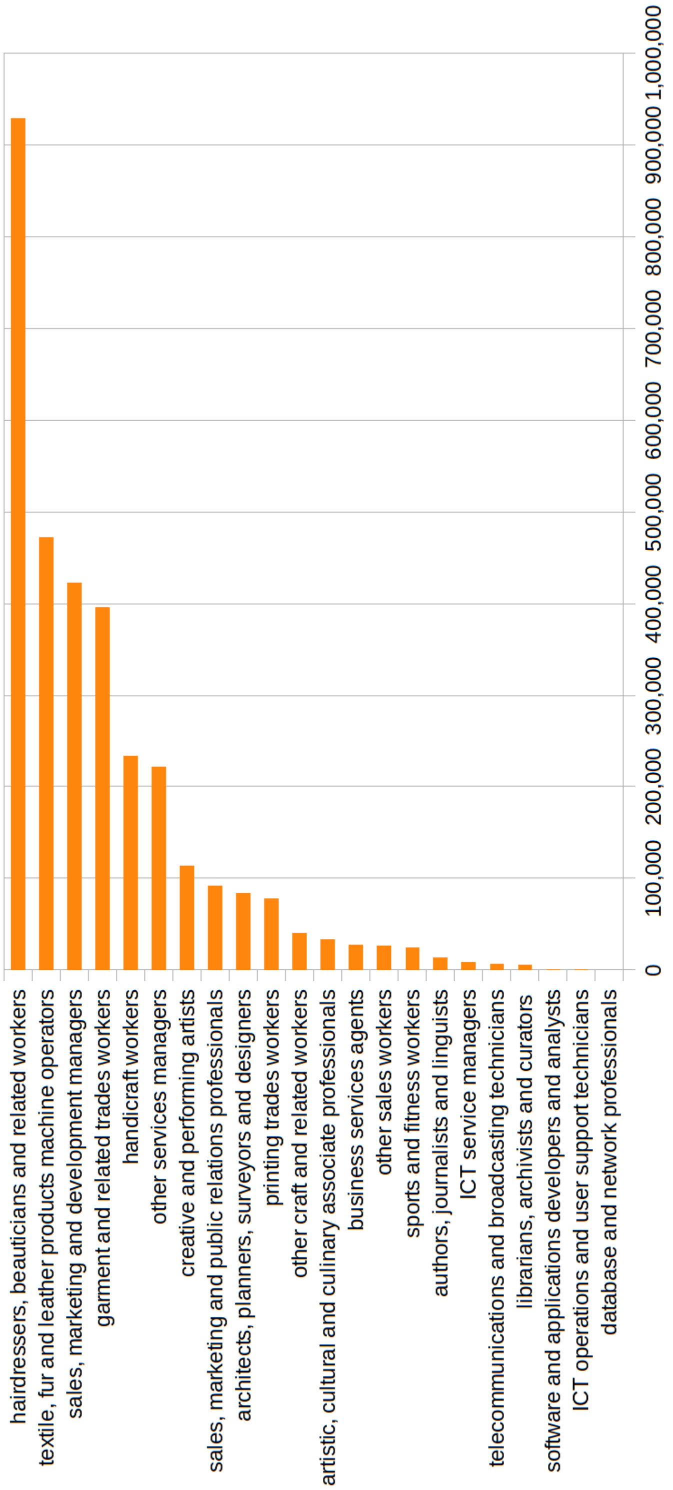
Observations:

Confidence intervals in the range of +/- 6-7% for the whole sample. Accuracy invariably varies between sub-groups because it is influenced by sub-group size (as total LFS sample size is given). The accuracy is high for large sub-groups and significantly decreases for small sub-groups. Numbers for small groups, for example ISCO 262 or 264, have confidence intervals between +/- 50-100% and therefore could be half or twice as large. Such numbers should therefore be considered to represent orders of magnitude rather than highly accurate figures. Identifying the order of magnitude is critical for designing support.

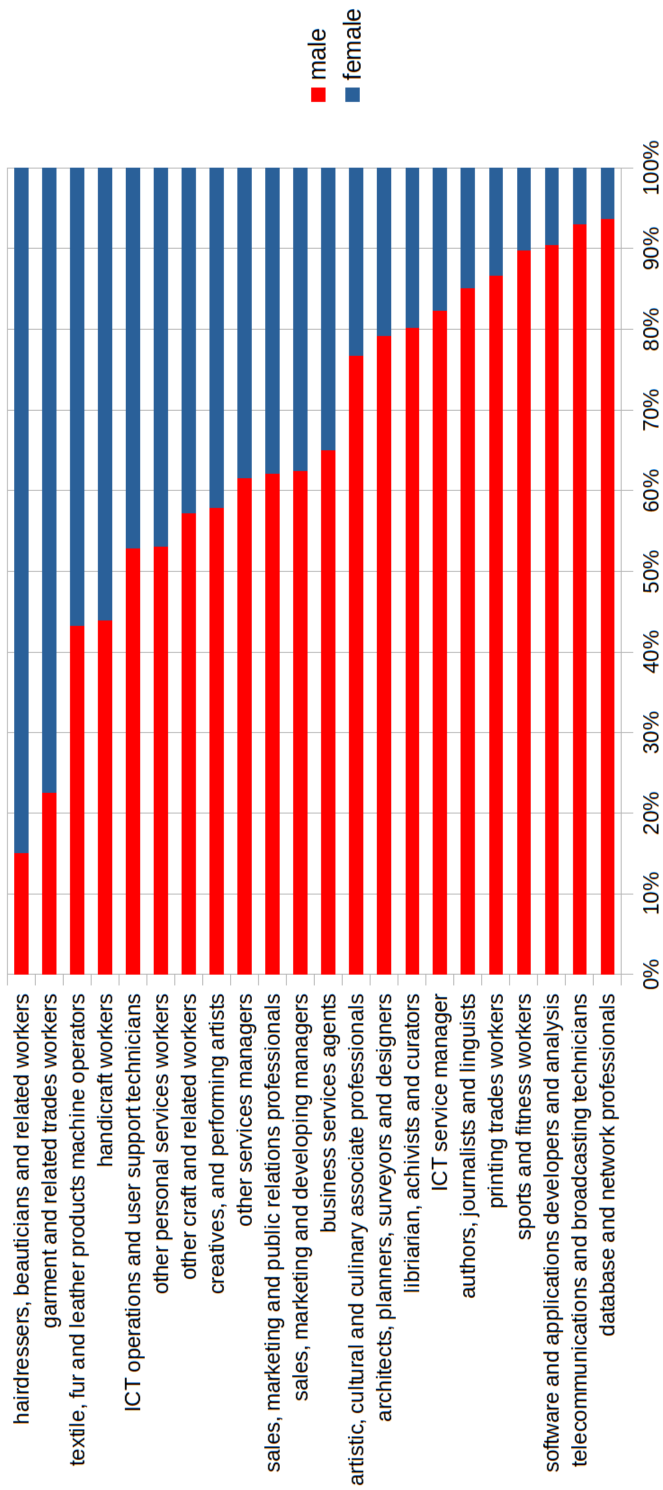
Similarly, estimations provided above on the shares of employment in more generic occupations within the creative industries are of initial character. As better data becomes available, estimates should be adjusted and refined.

If there is interest in more accurate occupational data (and this should be useful both for higher education and TVET planning, job matching, reducing the transition from school to work, employment promotion as well as strategy making for the different sub-sectors in the creative industries), stakeholders should reveal their interest to and support NBS so more detailed and accurate surveys can be published at regular intervals.

The following graphs sort these employed persons according to total number in specific occupations and according to the average shares of the two sexes in the respective occupations across the respective occupation.



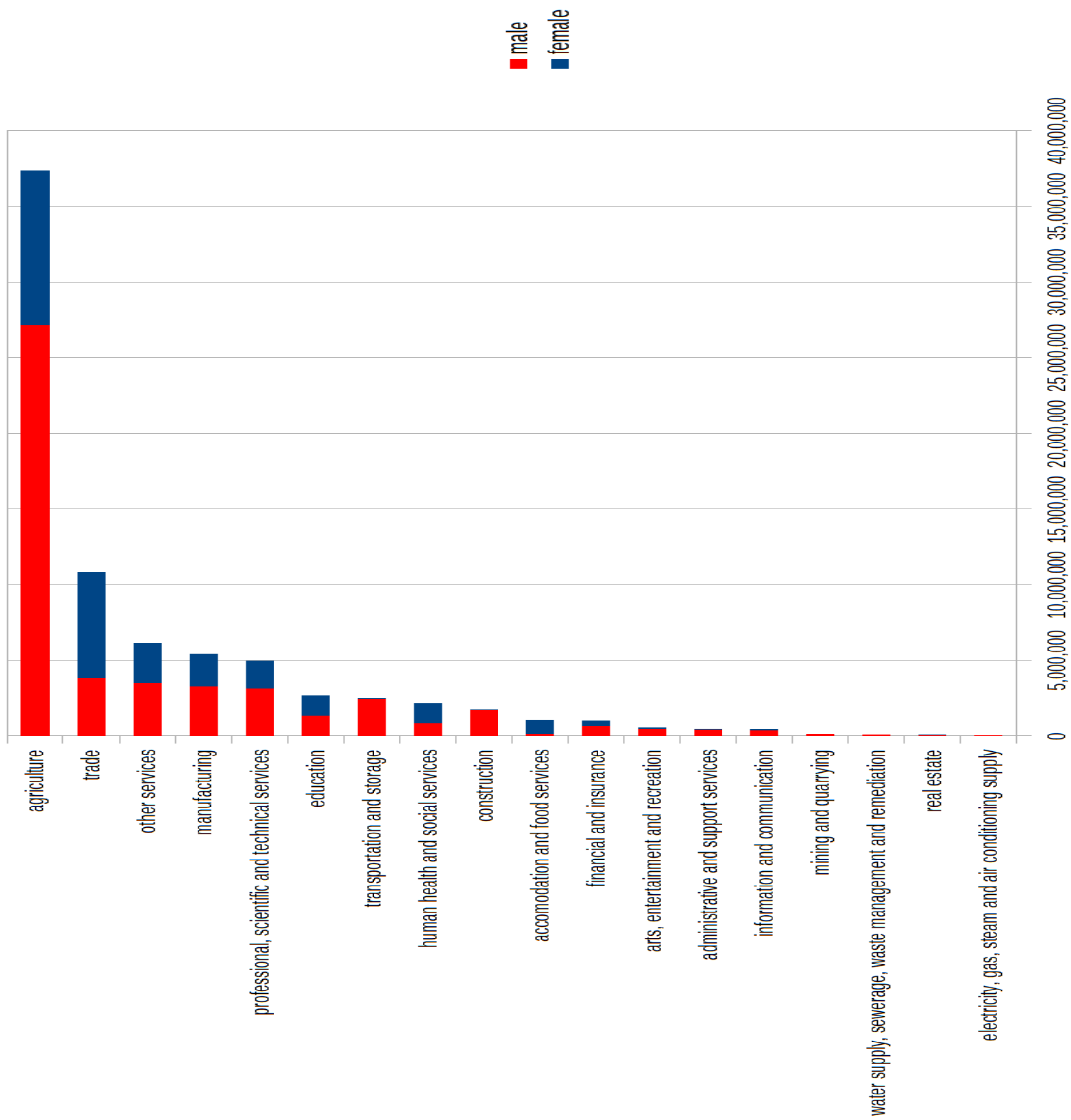
G.A15 Creative economy employment in Nigeria 2019 by major occupation groups (rough estimate).
Source: Own calculations based on 3-digit labour force data provided by NBS, drawing on LFS for Q1 2019.
Observation: Confidence intervals in the range of +/- 6-7% for the whole sample.



G.A16 Female and male average shares in employment by major occupation groups (estimate).
Source: Own calculations based on 3-digit labour force data provided by NBS, drawing on LFS for Q1 2019.
Observation: Confidence intervals in the range of +/- 6-7% for the whole sample.

Annex 4: Employment stock 2017 all sectors in Nigeria

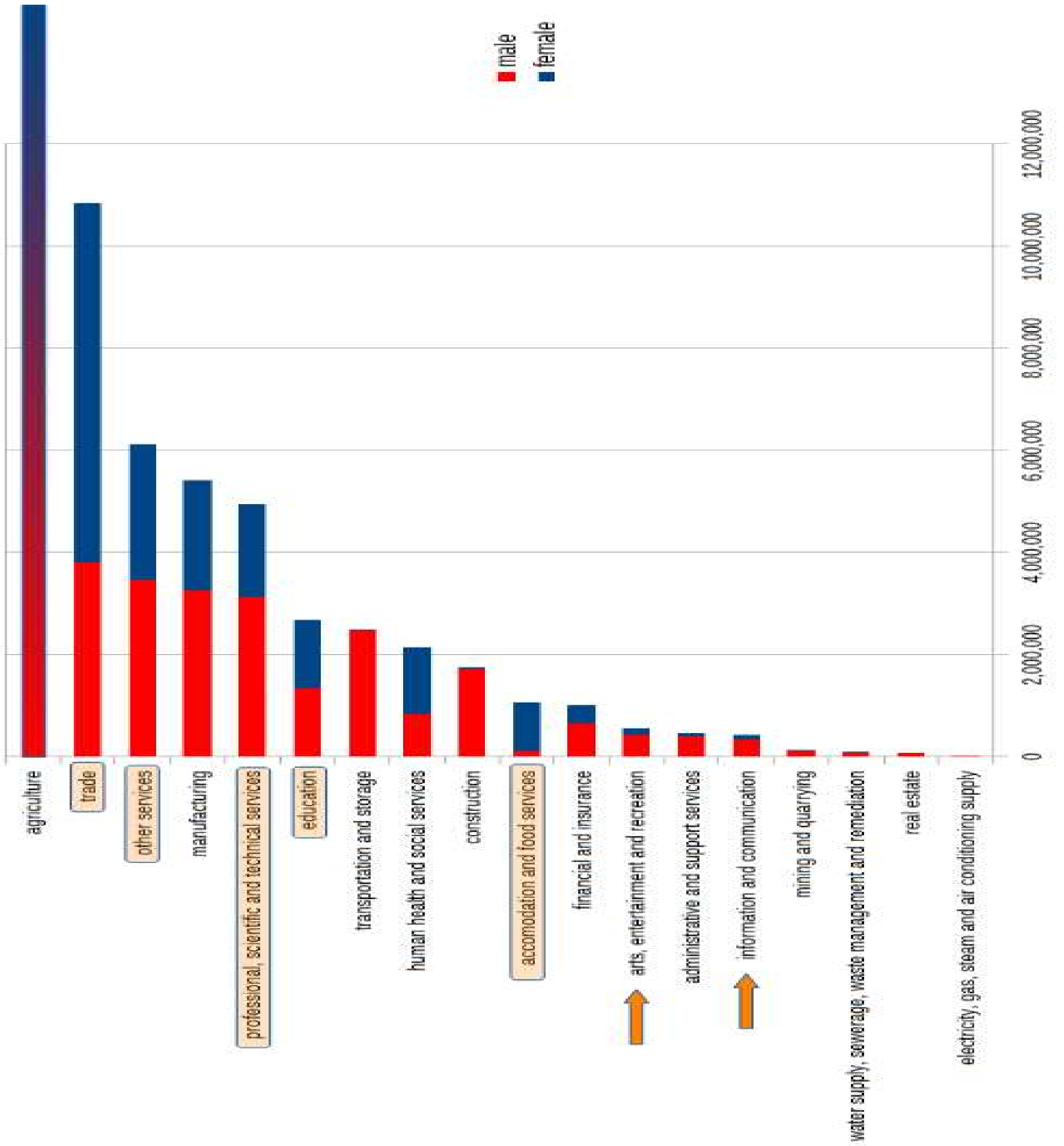
The bar chart below presents the structure of the stock of employment in Nigeria drawing on information published by NBS on its website highlighting the shares of females and males employed and ranking the statistical sectors according to the number of persons employed (NBS 2017). The figures include fully employed persons (40+h per week), underemployed persons (20<40h) and „unemployed“ persons, here understood as persons in the sector who work fewer than 20h per week. In other words, these figures include underemployed persons and part-timers.



G.A17 Employment stock 2017 all sectors by economic sectors and sex.
Source: NBS.

Agriculture is the lead sector for employment in the economy with 37.4 million persons (10.2 of whom million female), followed by trade (10.8 million, of whom 7.0 million female), other services (6.1 million, of whom 2.7 female), manufacturing (5.4/ 2.2 female), professional, scientific, and technical services (4.9/ 1.8 female) before education, transport, health, and construction.

The second bar chart below presents the same structure of the stock of employment, only that the resolution is changed to allow for a better view of other sectors beside agriculture.



G.A18 Employment stock 2017 all sectors by economic sectors and sex (different resolution). *Source:* NBS.

Two **orange arrows** point to the two economic sectors which usually are almost exclusively identified with creative industries. Six other economic sectors are **highlighted in light orange** color because they can usually contain significant shares of employment attributable to creative industry, for example traders of DVDs that contain video films or CDs that contain music; hairdressers because they are classified under other services; professional, scientific, and technical services because they include, among other, advertisers, architects, and photographers; education because it includes sports and cultural educators; and accomodation and food services because this is where event caterers are hidden in economic statistics.

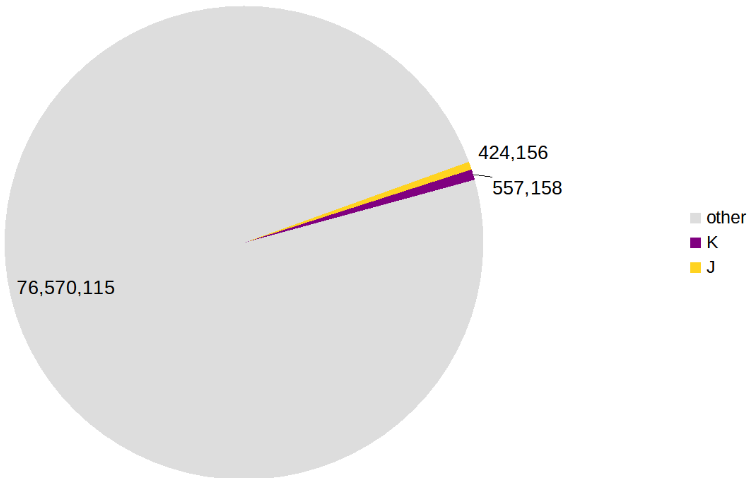
The graphs not only show why it is difficult to estimate the number of persons employed in cultural industries on the basis of long-standing industrial classifications, and underline the need to dig deeper. They also show that creative industries even as a whole are not likely to be among the biggest employers in Nigeria, at least not just yet. Even if the Nigerian film industry, which is a wonderful success story that shall not be diminished and shall continue to thrive, employed 1 million persons, as is sometimes is suggested in the media, this would only amount to 1.3% of total employment and rank twelfth to agriculture (not second to agriculture as frequently is alleged) where employment is concerned.

Annex 5: Employment stock 2017 „media and entertainment“ in Nigeria

The creative industries include far more sub-sectors than those included under the categories of „media and entertainment“. However, discussions about creative industries are guided by the developments in these sectors and therefore may provide a starting point. The following graphs represent employment information derived from Nigeria‘s labour force statistics for Q3 2017 for the ISIC sectors of information and communication and (media) and entertainment, arts, and recreation (entertainment).

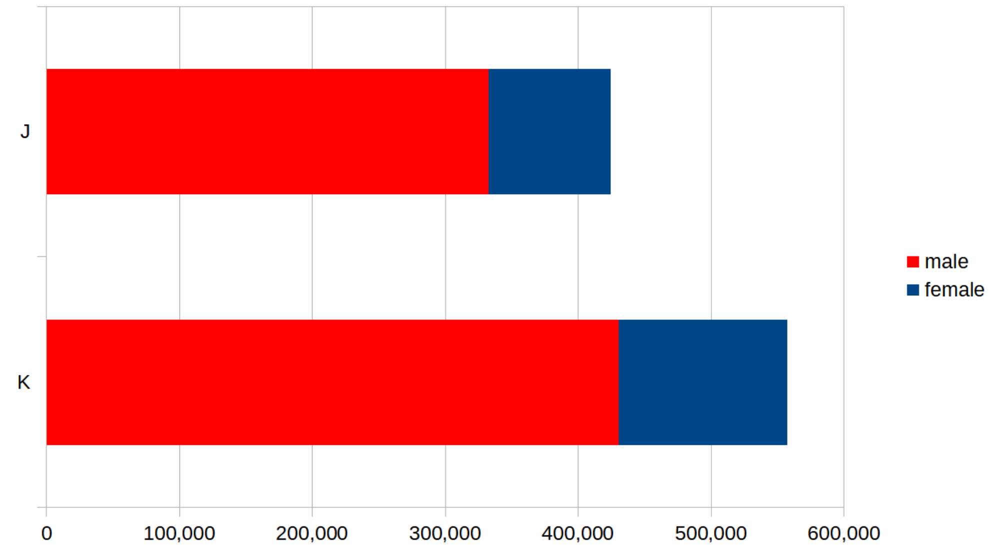
Information and communication (labeled J in some of the graphs) includes, for example, publishing of books, newspapers, and periodicals; software publishing including gaming; motion picture video and television production, post-production, distribution, and projection activities; sound recording and music publishing; broadcasting; web portals; and news agency activities.

Entertainment, arts and recreation (labeled K in some of the graphs), *inter alia*, includes creative arts and entertainment activities; libraries/ archives/ museums and operation of historical sites as well as other cultural activities; gambling and betting; and sports, amusement, and recreation activities.

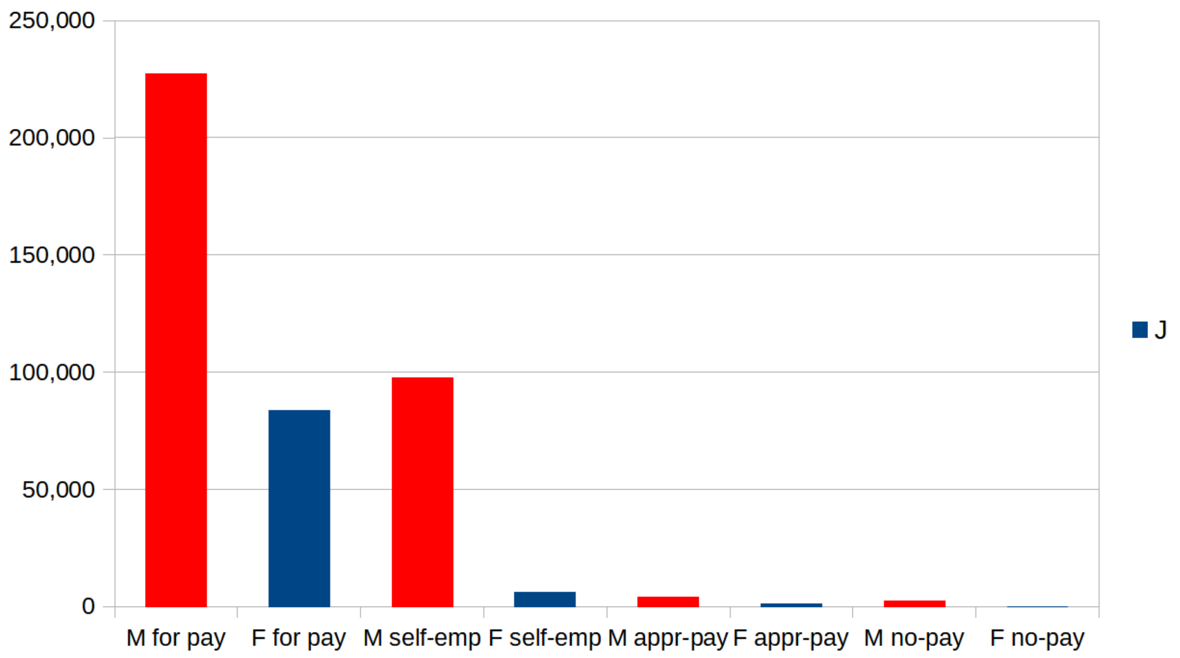


G.A19 Share of „media and entertainment“ in employment stock 2017, Q3 (number of persons employed).
Source: Own calculation based on NBS 2017 data sheets.
Observation: J ... information and communication; K ... entertainment, arts and recreation.

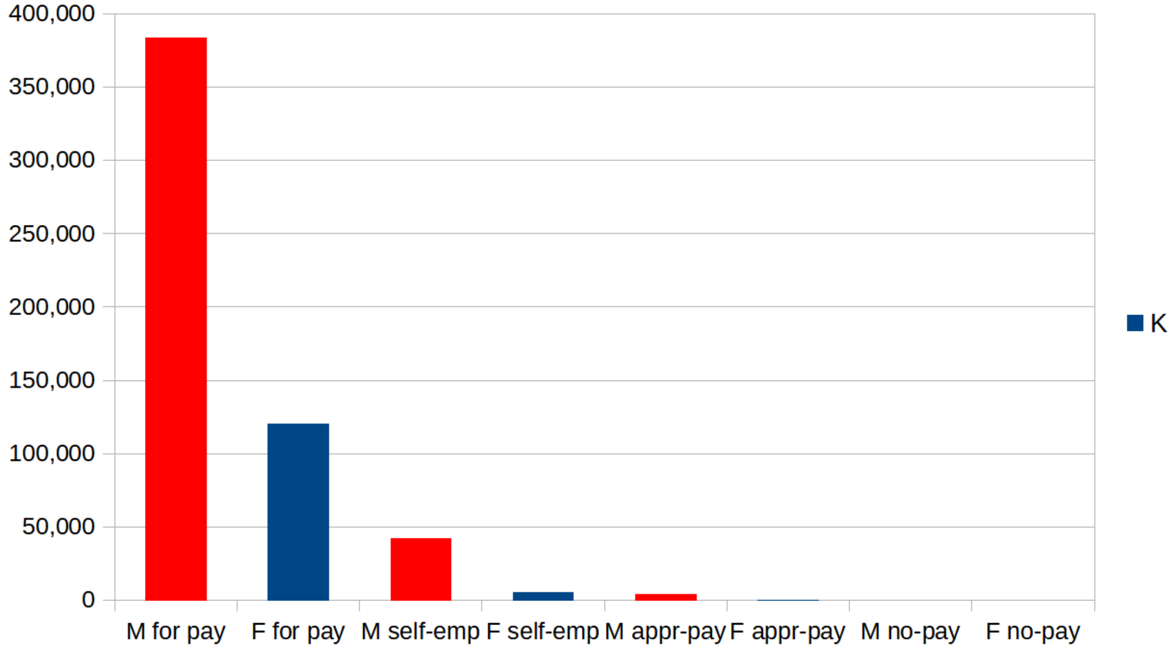
The employment figures include fully employed persons (40+h per week), underemployed persons (20<40h) and „unemployed“ persons, here understood as persons in the sector who work fewer than 20h per week. The employment categories distinguish between employees working for pay/ wage, self-employed persons, employed paid apprentices, and unpaid household workers (presumably contributing family members in ICLS nomenclature). In other words, all employment possibilities are covered and counted as equal (no conversion to full-time equivalents of those who are not working 40+h per week).



G.A20 Male and female shares of „media and entertainment" in employment stock 2017, Q3 (number of persons).
Source: Based on NBS 2017 data sheets.
Observation: J ... information and communication; K ... entertainment, arts and recreation.



G.A21 Male and female shares in „media" employment stock 2017, Q3 (number of persons).
Source: Based on NBS 2017 data sheets.
Observation: J ... information and communication;
appr ... apprentice; F ... female; M ... male; no-pay ... unpaid; pay ... paid; self-emp ... self employed.

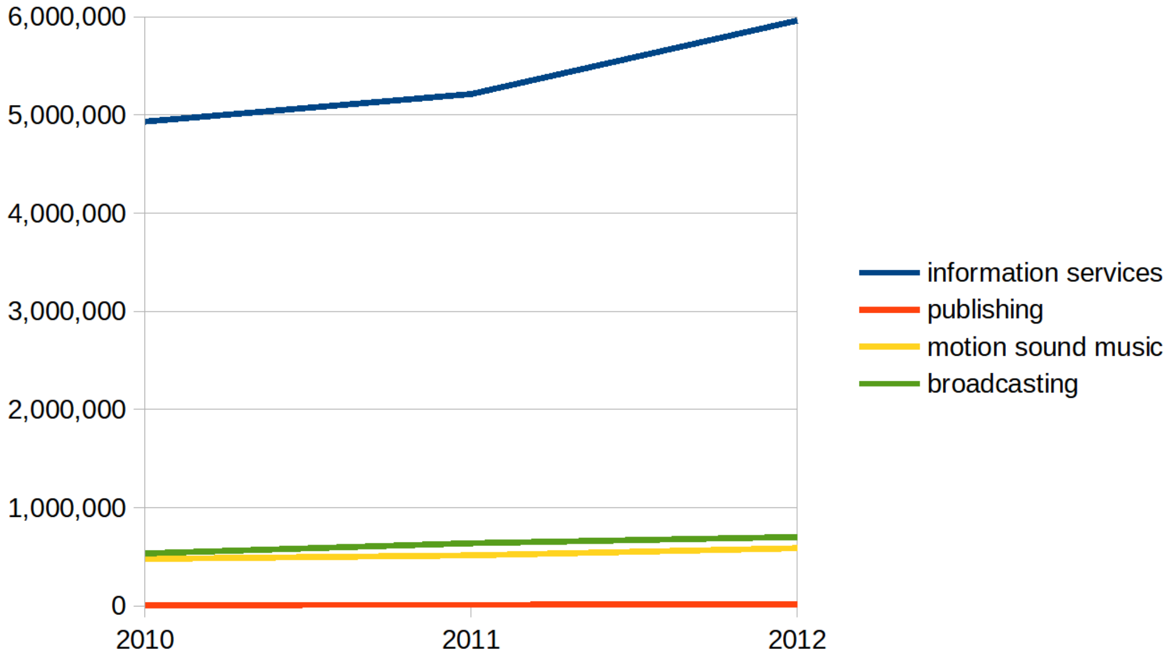


G.A22 Male and female shares in „media“ employment stock 2017, Q3 (number of persons).
Source: Based on NBS 2017 data sheets.
Observation: K ... entertainment, arts and recreation;
appr ... apprentice; F ... female; M ... male; no-pay ... unpaid; pay ... paid; self-emp ... self employed.

Annex 6: Disentangling employment stock and GDP in „media" in Nigeria

Economic sectors can grow in different ways. Some record high levels of labour productivity and are likely to lead to more secure and more decent jobs, some are employment intensive and offer many employment opportunities both decent and less decent. Discussions about the creative industries often emphasize economic growth and stay comparably silent on employment growth. Where there is significant unemployment, however, jobless growth may not necessarily be the prefered choice for a society. This is why it is useful to look both at value added and employment generated at the same time.

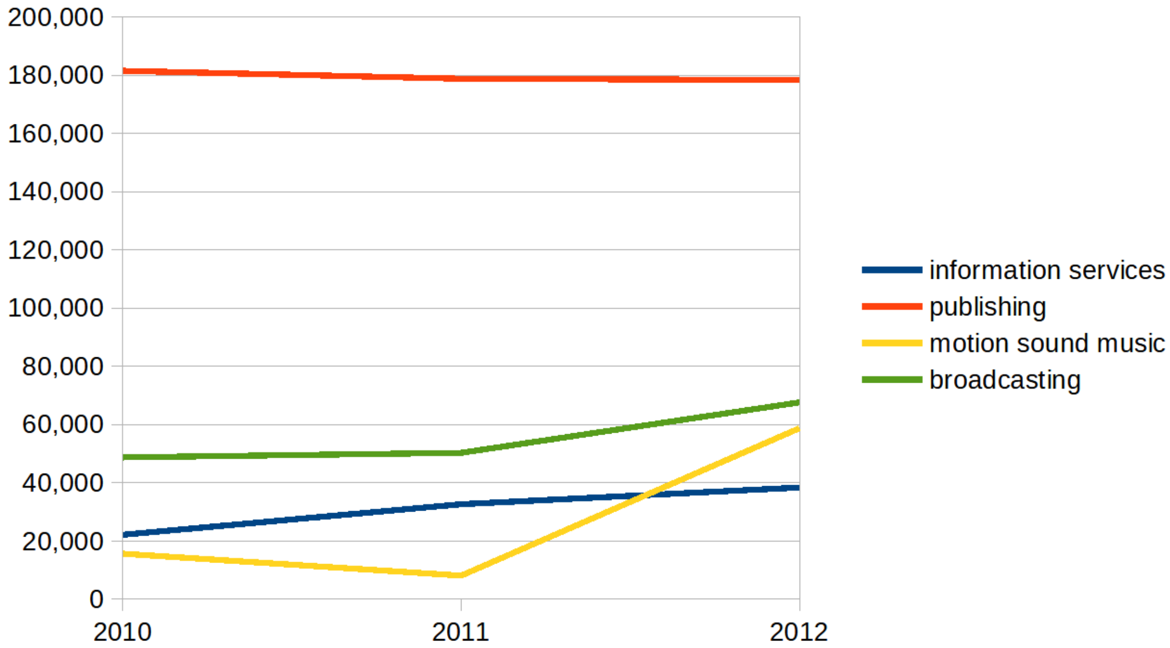
The following information was extracted from a report published by NBS on the sector of information and communication (NBS 2015) that represents what some summarize as „media". The report provided an overview of developments between 2010 and 2012, including GDP achieved and persons employed, and breaks them down into sub-sectors (1) telecommunications and information services; (2) publishing; (3) motion pictures, sound recording and music production; and (4) broadcasting.



G.A23 GDP in media 2010-2012 (NGN mn).
Source: NBS 2015.

The graph above presents the value added to GDP (in NGN millions) by the four sub-sectors during the period concerned as displayed (NBS 2015: 6, table 1). This is a resolution that is more meaningful for analysis than the broad sector category of information and communication if we want to learn about the creative industries. Information services clearly stand out in terms of generation of value added, and they appear to go stronger, at least during this short reference period.

The following graph displays the information on employment for the same four sub-sectors extracted from the text of the report (NBS 2015: 6-7, 16) and completed by deriving missing figures (own calculation). No specifications are available in the report whether the numbers refer to full-time employees only or whether underemployed categories are also included. Information about the shares of the two sexes are very patchy in the text and therefore not presented here. With regard to employment, publishing clearly takes the lead while motion picture production, sound recording, and music production appear to take off (during the reference period).



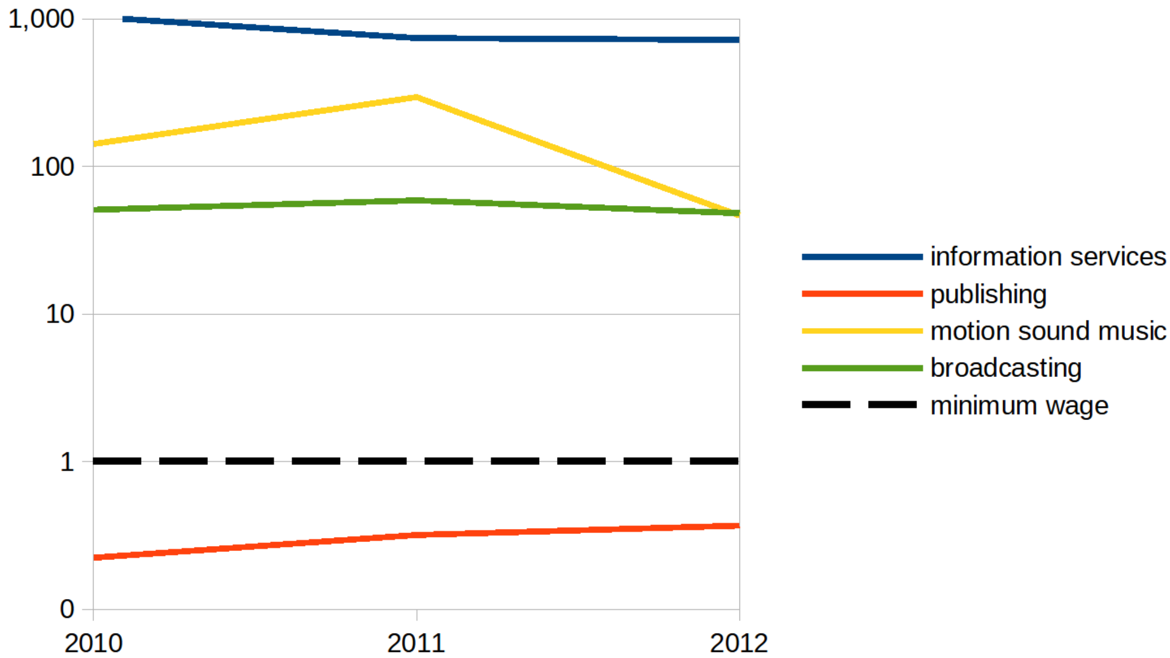
G.A24 Employment in media 2010-2012.
Source: NBS 2015.

The final graph (next page) is created in two steps. It combines the two statistics by dividing the GDP (in smaller resolution of NGN 1,000) of the four sub-sectors by the number of persons employed in the respective sub-sectors. In order to provide a measure of comparison (so we can get a better feel for the meaning of the numbers), the result is divided by the prevailing minimum wage of the time (NGN 18,000).

In other words, this expresses the GDP generated per person employed as a multiple of the minimum wage. Because the differences are so tremendous between the four sub-sectors, a log scale was chosen to provide a more legible graph.

- We can see that while publishing generates substantial employment, the GDP that results from these activities (during the reference period 2010-2012) is actually completely insufficient to sustain the labour force employed. Therefore, it is likely that much of the publishing work can only be undertaken as a second job or part-time and only a few may make a decent living out of publishing only.

- Broadcasting seems to be the most steady of the sub-sectors and would most likely be able to generate a rather decent income. That is not unusual because broadcasting typically is well regulated. But the sub-sector only generates one third of the employment that is being created in publishing.
- The gain in employment in motion picture production, sound recording and music production is not matched by a similar gain in value added, so labour productivity (GDP per person employed) is going down, but still is at the same level as in broadcasting at the end of the two year period.
- The highest labour productivity (by several dimensions) exists in telecommunications and information services. While the sub-sector may be capital intensive and therefore need to be able to finance substantial inputs in terms of equipment, e.g. for expanding networks, it should be able to generate decent employment opportunities. It would be great if the sector could expand employment, and maybe it can or even must if objectives of digitalization are to be achieved.



G.A25 GDP generated per person employed as a multiple of the minimum wage 2010-2012.
Source: Own calculations based on NBS 2015.

For analyzing the creative industries which currently is an amalgamation of sub-sectors with different ways of operating, and some of which in continuous change, sub-sector data is an essential starting point in the analysis as long as no satellite accounts have been created by the statisticians. Moreover, given the uncertainties with regard to defining the creative industries, looking at sub-sector and microdata from existing statistics may be a safer road to information gathering because no premature decisions on data collection need to be taken.

Annex 7: Model terms of reference for ELS in the creative industries

Disentangling creative industries to gain a better understanding of employment and economic opportunites

„Cultural and creative industries“, „creative industries“, the „creative economy“, and the „orange economy“[1] all are terms which have been used to designate a set of economic activities that appear to have a relationship with culture, arts, crafts sub-sectors and/ or cultural, arts or craft-related occupations and which, in conjunction with new and very enabling technological possibilities that are emerging with the expansion of information and communication technologies, seems to have gained considerable currency, over the course of the last 2-3 decades. In this report, both for consistency in style and lack of a universally agreed definition, we will only refer to „creative industries” which may stand for either of the four designations.

„What is the creative economy?

„The creative economy has no single definition. It is an evolving concept which builds on the interplay between human creativity and ideas and intellectual property, knowledge and technology. Essentially it is the knowledge-based economic activities upon which the ‘creative industries’ are based.

„The creative industries – which include advertising, architecture, arts and crafts, design, fashion, film, video, photography, music, performing arts, publishing, research and development, software, computer games, electronic publishing, and TV/ radio – are the lifeblood of the creative economy. They are also considered an important source of commercial and cultural value.

„The creative economy is the sum of all the parts of the creative industries, including trade, labour and production.“

UNCTAD Creative Economy Programme[2]

[1] Cf. Buitrago Restrepo and Duque Márquez 2013.

[2] https://unctad.org/topic/trade-analysis/creative-economy-programme [retr. 2021-08-23]

The box above contains one of the most widely used definitions for the creative industries (called, in this case, creative economy). A table in Annex 8 provides a brief overview of varying dimensions that exist even within the United Nations system as well as between different countries. There may be pros and cons to each of these concepts, depending on their purposes or perspectives, but none of them are fully satisfying when it comes to the arduous task of assessing the employment that may be generated by these industries. What is more, due to the many differences in definition, extreme prudence is required when comparing figures (e.g. of employees, value added) between countries or even different studies of the same population.[3] The accounts drawn up currently are rather likely not to be comparable, despite best efforts.[4] Comparing or benchmarking employment generation currently is almost impossible to achieve within the framework of short-term snapshot exercises such as ELS.

High expectations for future growth of economic activity are associated with the creative industries. Moreover, many see this set of activities as providing abundant opportunities for employing youth, i.e. age groups that have appeared to essentially have be locked out of labour markets roughly since the beginning of the century. This has not always been the case. In many societies older generations have not regarded employment in the creative industries as a valid occupation, based on a (perceived and/ or effective) lack of prospects and little job security or status, and encouraged youth to seek employment in other sectors instead.

Over recent years, the creative industries are moving centre stage when it comes to efforts related to increasing employment opportunities.[5] Creative industries do provide a pathway toward a more diverse, resilient and sustainable economy based on ideas and knowledge, storytelling and imagination, creativity and collaboration, and environmental responsibility. Their material resource consumption is comparably limited. Therefore, they can facilitate sustainable development. They are expected to play a particular role in contributing to the following Sustainable Development Goals (SDG):

- SDG 4 - Quality education
- SGD 8 - Decent work and economic growth
- SDG 9 - Industry, innovation and infrastructure
- SDG 10 - Reduced inequalities
- SDG 11 - Sustainable cities and communities

[3] See, e.g., the overview provided by Cruz and Teixeira 2014.

[4] For illustration, see the effort required to make statistics comparable between Canada, the UK, and the USA, as discussed in in Nathan et al. 2016. UNESCO Institute for Statistics 2012 provides a broad introduction to requirements for unified measurements of cultural industries. At the level of the EU, the EU IPO 2019 has submitted proposals for developing satellite accounts for creative industries. Though some countries have pushed ahead, establishing agreed frameworks is still work in progress.

[5] The Asian Development Bank and the ASEAN Secretariat have launched a global call for proposals in preparation of the G20 Indonesia in 2022. Cf. also G20insights 2021.

Whether the creative industries are going to be able to meet the expectation of becoming an engine of sustainable growth and job generation is still unclear, particularly in lower and middle income countries. Therefore, the following observations are meant to enable readers not thoroughly acquainted with creative industries to take statements, figures and publications on the creative industries within an appropriate grain of salt.

- There is a certain tendency to conflate categories describing the creative industries which runs the risk of generating over-optimistic expectations for countries in the low and middle income brackets. For example, data assembled according to UNSD standards, based on pre-existing country classifications, may unwillingly give the impression that significant opportunities exist in the creative industries for low and middle income countries. However, the respective data still includes the world's manufacturing powerhouse China together with its special administrative regions and high-income OECD members like Chile and South Korea, or countries like Brazil, India, Mexico, and Turkey among the long-standing binary category of developing regions. Another example of at least partial conflation is a market and consumer data publishing entity including the telecommunications and information services among the sub-sectors of the creative industries, thereby adding the whole of NGN 8.5 trillion to Nigeria's 2021 „creative and entertainment industry" accounts.[6] Careful assessments are required at individual country level because global trends may be misleading.
- A significant number of publications and media reports on the creative industries tend to seek attention by referring to global estimates of value added or employment created in the creative industries.[7] On the other hand, a significant number stay silent on value added and employment created at national or local levels and rather focus on measures that are lacking in order to assist these creative industries grow in order to reap their share in the (potentially global) market.[8] While some of the lacunae may be explained by difficulties in gathering the statistics due to the absence of creative industries satellite accounts, even attempts to at least properly estimate the orders of magnitude, as a starting point, are not yet available.[9]
- There are legitimate questions as to what extent it is meaningful to include manufacturing activities (or, as another example, information and communication technology or research and development) in the figures representing the creative

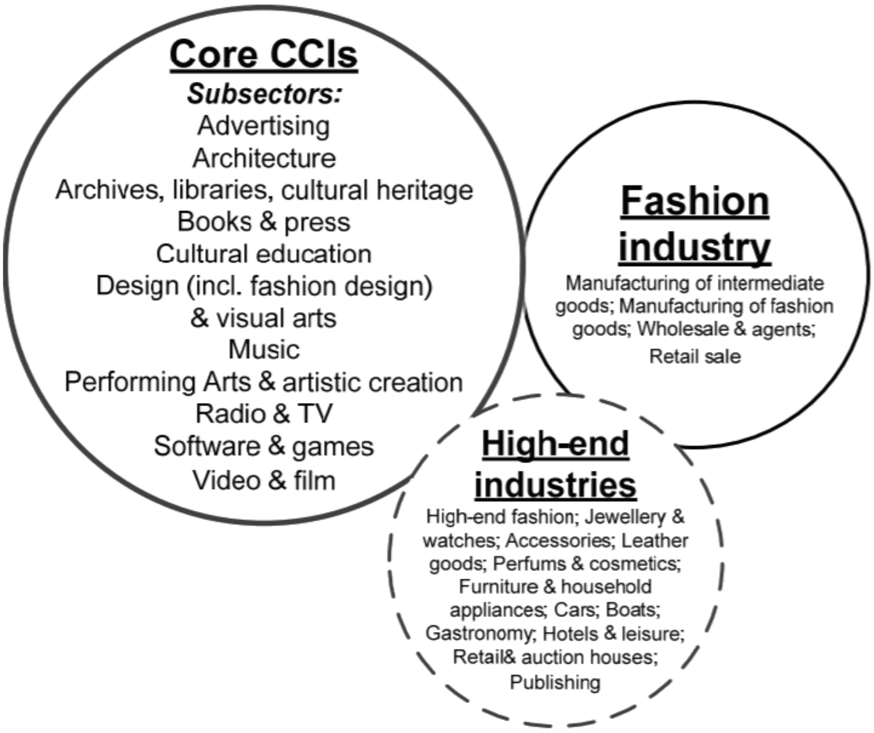
[6] https://www.statista.com/statistics/1185703/contribution-of-nigeria-creative-industry-to-gdp/ [retr. 2021-12-29]

[7] If the global number put forward by EYGM Limited 2015, the first alleged attempt to come up with a global estimate, of revenues in the creative industries, amounting to USD 2,250 billion and 29 million jobs worldwide holds any water, then what may seem impressive at first glance (3% of world GDP) becomes tempered when held against global employment figures (not referenced in the report) of 3,200 million employed worldwide, implying only 0.9% of world employment.

[8] Hivos 2016, for example, does not mention a single figure relating to jobs or income when describing the status of the creative economy. SY4E 2021 also does not mention any figure on jobs when discussing opportunities in the music sub-sector. Technically speaking, this is obviously more professional than inventing such figures in a bid to build a market for, e.g., accounting and consultancy services (for Nigeria cf. the example in Annex 7).

[9] Jobberman Nigeria 2021a: 35 is a notable recent exception, by coming forward with an estimate of their own, based on different sources, of creative sector employment including a projection to the future.

industries. While, for example, fashion, as a design-related activity and occupation, is easily categorized as pertaining to the creative industry, there are sufficient grounds to argue that garment and textile production are not and should not be added to a list of creative industries (see graph below). Design is an integral part of many industries, including the manufacturing of motor vehicles. The proper way of accounting for the effects of fashion on employment and value added in textiles and garment production would be by ways of linkage or multiplier effects. Alternatively, design could be part of the manufacturing processes themselves (vertical integration).

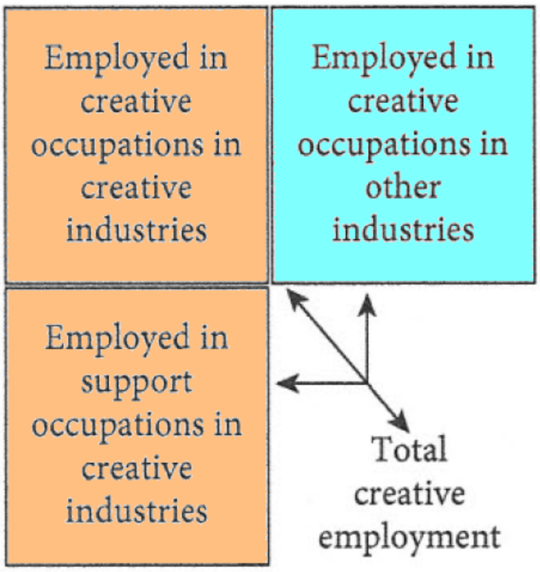


G.A26 Cultural and Creative Industries (CCI).
Source: EC 2016: 14, fig.1.

- Considerable attention is being given in international discussions to the inclusion of the employment of „creatives" in other („non-creative') sectors of the economy. The solution proposed for researching the potential and the development of the creative industries and applied in several countries is to work with a „trident" (see graph below) when establishing the respective creative industry satellite accounts.[10] This quite obviously is tantamount to adding electricians of all sectors to the employment figures of the manufacture of electrical equipment. It is also surprising insofar as satellite accounts established for sectors such as tourism usually only count all of the employees directly or

[10] GIZ 2020: 3-4 also adopts this trident for comparing „creative employment" between five countries.

indirectly employed by the tourism sector (i.e. without adding persons who have been trained or worked in tourism before but moved on to work in other sectors in like occupations). While it may certainly be useful for human resource and education sector planners to be able to anticipate how many „creatives“ can be absorbed in the economy as a whole, conflating counts of specific occupations in different sectors diverges from normal practices in creating industry or sector satellite accounts and therefore can be misleading when comparing the employment potential of the creative industries with the employment in other economic sectors.



G.A27 „Creative Trident“.
Source: Higgs and Cunningham 2008: 26.

- There is a risk of underestimating the level of cultural creative activity because artists often find it difficult to obtain regular employment and take on second (or effectively first) jobs in order to secure a livelihood. This may obscure cultural creative activity in national accounts both of employment and income. As surveys are made, these „creatives“ are likely to be classified on the basis of their secondary „regular“ jobs, and not on the basis of their primary „creative“ activity.[11] When it comes to assessing employment and labour markets, however, with the possible exception of occasional (not regular) small-scale gig work, this statistical invisibility neither lacks veracity nor accuracy. For designing employment promotion measures and policies, we usually want to know what people do to earn a living, and not where their passions lead them before or after business hours.

[11] For some recent variations of such „mixed profiles“ under pandemic conditions in 7 urban centers of the Middle East and Sub-Saharan Africa cf. *inter alia* GIZ 2021: 19, 38, 57. It should be pointed out, however, that surveys related to living standards measurement and labour force usually anticipate and therefore usually include secondary (and more) occupations. This also goes for Nigeria.

- Another reason frequently put forward for potentially underestimating the level of cultural creative activities is that freelance activities and small scale businesses in the creative industries do not tend to be captured by major surveys. The same would, however, apply to all freelance and small-scale activities equally and proportionally as long as appropriate research frames are drawn up and sampling methods are sound. If fewer (more) creative freelancers and creative small-scale activities are being picked up by a survey than self-employed engineers and small plumber workshops, this should usually reflect that there are effectively fewer (more) creative industry activities than there are engineers and plumbers.
- One important question, thus far unsolved, affecting labour market and employment studies as well as respective interventions is whether work in the „creative industries" is or can become decent work. Most jobs in the creative industries are of a precarious nature.[12] Much of this is attributable to project-based work (e.g. gig work, motion picture production) where organizational levels of employees and even employers are relatively low and collective bargaining structures that could contribute to achieving decent work usually do not have the time to evolve. Moreover, project-based work frequently is the underlying condition for the exorbitant and incessant pressure on performers („talents") to compete with each other and the highly unequal conditions of pay („winner takes all", „nothing succeeds like success"). Given the heterogeneous nature of the sub-sectors included in definitions of the creative industries, and the different work conditions in these sub-sectors, the level of decency of work can only be assessed in relation to specific occupations and practices prevailing in a specific sub-sector (at a specific time and location).
- There is a wide-spread fallacy of assumption that creative industries are endowed with a higher share of creativity than other economic activities. Arguably, „creative industries" is a misnomer. There is nothing particularly creative about earning a living by performing dance music standards in a club (or Western classical music to tourists in an orchestra hall) night after night. Creativity is required in most human activities and not only in the creative industries. High-level artists (or, for that matter, athletes or gamers in esports) are usually much more characterized by an exceptionally high level of skill which comes from intensive training and practice, often combined with a significant amount of dedication that is not motivated by income prospects. At the same time, even „average" craftspersons need to be creative to solve practical problems on a daily basis. Therefore, as all industries, creative industries essentially thrive upon skills, not so much upon creativity. (That being said, exploiting, making the most of creativity can actually be trained as a skill for any occupation.)
- While there is no doubt that jobs in creative industries, particularly in combination with digitalization and media, may appear modern and youthful and therefore attractive to youth, it remains unclear to which extent the creative industries effectively are able to

[12] Cf. ILO 2012, ILO 2014, ILO 2019 and ILO 2020. For some country or industry examples, cf. Campbell 2020 (Canadian creative industries), Christopherson 2009 (US film industry) or Obiaya 2012 (Nigerian film industry).

absorb (employ) larger shares of youth than other sectors.[13] In particular, those focusing on talent with highly competitive and repeated selection processes will not lead to important employment effects, although they may be an important element in the related ecosystem.

Keeping these observations in mind will help in **avoiding potential pitfalls and disappointments while constructively engaging with the exciting developments that have taken and continue to take place in the realm of the creative industries** and exploring how they may contribute to employment promotion and sustainable development, and in particular to generate decent or at least comparably „good“ jobs that may lift people of both sexes and ideally also larger shares of youth out of poverty while neither harming the environment nor contributing to climate change.

[13] For example, SY4E 2020: 5, fig.3, drawing on UIS data, displays the „top 10“ countries with „large percentages“ of persons aged 15-24 employed in cultural occupations. When these shares are held against the shares the respective age group holds in the total population of these countries, however, the employment share of this age group in almost all of these „top 10“ countries in the respective creative industries cannot even be called proportionate.

Different creative industry classifications

Symbolic texts	Concentric circles	UNCTAD	UNESCO	WIPO
Core cultural industries	**Core creative arts**	**Heritage**	**Cultural domains**	**Core copyright industries**
Advertising	Literature	Traditional cultural expressions	**Cultural and natural heritage**	Advertising
Film	Music	Cultural sites	Museums	Collecting societies
Internet	Performing arts	**Arts**	Archeological and historical	Film and video
Music	Visual arts	Visual arts	Cultural landscapes	Music
Publishing	**Other core cultural industries**	Performing arts	Natural heritage	Performing arts
Television and radio	Film	**Media**	**Performance and celebration**	Publishing
Video and computer games	Museums and libraries	Publishing and printed media	Performing arts	Software
Peripheral cultural industries	**Wider cultural industries**	Audiovisuals	Music	Television and radio
Creative arts	Heritage services	**Functional creations**	Festivals, fairs, and feasts	Visual and graphic arts
Borderline cultural industries	Publishing	Design	**Visual arts and crafts**	**Interdependent copyright ind.**
Consumer electronics	Sound recording	New media	Fine arts	Blank recording material
Fashion	Television and radio	Creative services	Photography	Consumer electronics
Software	Video and computer games		Crafts	Musical instruments
Sport	**Related industries**		**Books and press**	Paper
	Advertising		Books	Photocopiers, photogr. eq.
	Architecture		Newspaper and Magazine	**Partial copyright industries**
	Design		Other printed matter	Architecture
	Fashion		Library	Clothing, footwear
			Book fairs	Design
			Audio-visual and interactive me	Fashion
			Film and video	Household goods
			TV and Radio	Toys
			Internet podcasting	
			Video games	
			Design and creative services	
			Fashion design	
			Graphic design	
			Interior design	
			Landscape design	
			Architectural services	
			Advertising services	
			Related domains	
			Tourism	
			...	
			Sports and recreation	
			...	

the cultural and creative economy lacks a brand identity, we decided to label it the Orange Economy.

- The Orange Economy is the group of linked activities through which ideas are transformed into cultural goods and services whose value is determined by intellectual property.
- The orange universe includes:
  i) the Cultural Economy and the Creative Industries which share the Conventional Cultural Industries; and
  ii) creativity supporting activities.

BR	CN	DE	UK	Jobberman.com
Core	**Core part**			**Media**
Consumption	News services	Advertising market	Advertising	Broadcasting (TV and radio)
Advertising and marketing	Publishing and copyright services	Architecture market	Architecture	Advertising and digital marketing
Architecture	Radio, TV, and film	Art market	Art and antiques market	Print media, newspapers and publishing
Design	Art service	Book market	Crafts	Internet streaming
Fashion	**Periphery part**	Broadcasting industry	Design	**Entertainment and performing arts**
Culture	Internet service	Design industry	Fashion	Film and production
Cultural expression	Leisure and entertainement servi	Movie industry	Film and video	Music
Heritage and arts	Other cultural services	Music industry	Music	Comedy
Music	**Related part**	Performing arts market	Performing arts	Video games and gambling
Scenic arts	Cultural product, equipment and c	Press market	Publishing	Sports and physical fitness
Media	Sale of product, equipment and o	Software and games ind.	Software	Theater, dance and drama
Publishing		Other	Television and radio	**Tourism and hospitality**
Audiovisual			Video and computer games	Hotel and travel
Technology				Restaurants and eateries
Research and development				**Visual art and handwork**
Biotechnology				Arts and paintings
ICT				Photography
Related activities				Graphic design and animation
Industries				Woodwork/ carpentry and metal fabrication
...				Jewelry making
Services				**Life style and beauty**
...				Fashion and design/ shoes and accessories
Support				Hair style/ beauty and skin care
...				Interior decoration and architectural design

Drawing on existing statistics in order to develop estimates for employment and economic activities in creative industries

The different statistics set up, often following the UNESCO criteria are important, but they do not always cover the questions which are most relevant to ELS. For ELS, the most relevant source are labour force surveys, and in particular any data relating to occupations. GDP-related statistics also are important.

There is no statistical category for creative industries in standard occupational and economic statistics. In order to be able to quantify employment in creative industries, we have developed the following lists (based on international standard classifications) to enable statistical authorities to extract relevant data for the ELS from routine statistics (or alternatively provide us with the respective microdata so we may extract the data to minimize the burden them).

They may not always be available at the required resolution, but we need to start somewhere. The increasing availability of labour force surveys and the availability of living standard measurement surveys may be the primary sources. As interest in the creative industries increases, more data hopefully will become available.

Requested data for cultural and creative industries research

Number of persons according to labour force survey estimates or other sources over the last available decade

Total for 1-digit category for comparison and subtotals for 4-digit category (‚potentially creative‘).

ISCO 08 Code	Title EN
1	Managers
1222	Advertising and public relations managers
1223	Research and development managers
1431	Sports, recreation and cultural centre managers
2	Professionals
2161	Building architects
2162	Landscape architects
2163	Product and garment designers
2166	Graphic and multimedia designers
2354	Other music teachers

2355	Other arts teachers
2431	Advertising and marketing professionals
2432	Public relations professionals
2511	Systems analysts
2512	Software developers
2513	Web and multimedia developers
2514	Applications programmers
2519	Software and applications developers and analysts not elsewhere classified
2521	Database designers and administrators
2522	Systems administrators
2523	Computer network professionals
2529	Database and network professionals not elsewhere classified
2621	Archivists and curators
2622	Librarians and related information professionals
2641	Authors and related writers
2642	Journalists
2651	Visual artists
2652	Musicians, singers and composers
2653	Dancers and choreographers
2654	Film, stage and related directors and producers
2655	Actors
2656	Announcers on radio, television and other media
2659	Creative and performing artists not elsewhere classified
3	Technicians and associate professionals
3118	Draughtspersons
3332	Conference and event planners
3421	Athletes and sports players
3422	Sports coaches, instructors and officials
3423	Fitness and recreation instructors and program leaders
3431	Photographers
3432	Interior designers and decorators
3433	Gallery, museum and library technicians

3435	Other artistic and cultural associate professionals
3511	Information and communications technology operations technicians
3512	Information and communications technology user support technicians
3513	Computer network and systems technicians
3514	Web technicians
3521	Broadcasting and audio-visual technicians
3522	Telecommunications engineering technicians
4	Clerical support workers
5	Service and sales workers
5141	Hairdressers
5142	Beauticians and related workers
5241	Fashion and other models
6	Skilled agricultural, forestry and fishery workers
7	Craft and related trades workers
7312	Musical instrument makers and tuners
7313	Jewellery and precious-metal workers
7314	Potters and related workers
7315	Glass makers, cutters, grinders and finishers
7316	Sign writers, decorative painters, engravers and etchers
7317	Handicraft workers in wood, basketry and related materials
7318	Handicraft workers in textile, leather and related materials
7319	Handicraft workers not elsewhere classified
7321	Pre-press technicians
7322	Printers
7323	Print finishing and binding workers
7531	Tailors, dressmakers, furriers and hatters
7532	Garment and related pattern-makers and cutters
7533	Sewing, embroidery and related workers
7549	Craft and related workers not elsewhere classified
8	Plant and machine operators, and assemblers
9	Elementary occupations
0	Armed forces occupations

GRAND TOTAL

Requested data for cultural and creative industries research

A. Number of persons according to labour force survey estimates or other sources over the last available decade

B. Value added according to GDP/GNI estimates or other sources over the last available decade

Total for 1-digit category for comparison and subtotals for 4-digit category (‚potentially creative‘).

Code Description **ISIC-rev4**

A Agriculture forestry and fishing

B Mining and quarrying

C Manufacturing

D Electricity gas steam and air conditioning supply

E Water supply; sewerage waste management and remediation activities

F Construction

G Wholesale and retail trade; repair of motor vehicles and motorcycles

4742 Retail sale of audio and video equipment in specialized stores

4761 Retail sale of books newspapers and stationary in specialized stores

4762 Retail sale of music and video recordings in specialized stores

4763 Retail sale of sporting equipment in specialized stores

4764 Retail sale of games and toys in specialized stores

4791 Retail sale via mail order houses or via Internet

H Transportation and storage

I Accommodation and food service activities

5621 Event catering

J Information and communication

5811 Book publishing

5812 Publishing of directories and mailing lists

5813 Publishing of newspapers journals and periodicals

5819 Other publishing activities

5820 Software publishing

5911 Motion picture video and television programme production activities

5912 Motion picture video and television programme post-production activities

5913 Motion picture video and television programme distribution activities

5914 Motion picture projection activities

5920 Sound recording and music publishing activities

6010 Radio broadcasting

6020 Television programming and broadcasting activities

6201 Computer programming activities

6202 Computer consultancy and computer facilities management activities

6209 Other information technology and computer service activities

6311 Data processing hosting and related activities

6312 Web portals

6391 News agency activities

6399 Other information service activities n.e.c.

K Financial and insurance activities

L Real estate activities

M Professional scientific and technical activities

7110 Architectural and engineering activities and related technical consultancy

7120 Technical testing and analysis

7210 Research and experimental development on natural sciences and engineering

7220 Research and experimental development on social sciences and humanities

7310 Advertising

7320 Market research and public opinion polling

7410 Specialized design activities

7420 Photographic activities

7490 Other professional scientific and technical activities n.e.c.

N Administrative and support service activities

7721 Renting and leasing of recreational and sports goods

7722 Renting of video tapes and disks

7740 Leasing of intellectual property and similar products except copyrighted works

8219 Photocopying document preparation and other specialized office support activities

8230 Organization of conventions and trade shows

O Public administration and defence; compulsory social security

P Education

8541 Sports and recreation education

8542 Cultural education

Q Human health and social work activities

R Arts entertainment and recreation

9000 Creative arts and entertainment activities

9101 Library and archives activities

9102 Museums activities and operation of historical sites and buildings

9103 Botanical and zoological gardens and nature reserves activities

9200 Gambling and betting activities

9311 Operation of sports facilities

9312 Activities of sports clubs

9319 Other sports activities

9321 Activities of amusement parks and theme parks

9329 Other amusement and recreation activities n.e.c.

S Other service activities

9511 Repair of computers and peripheral equipment

9512 Repair of communication equipment

9602 Hairdressing and other beauty treatment

T Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use

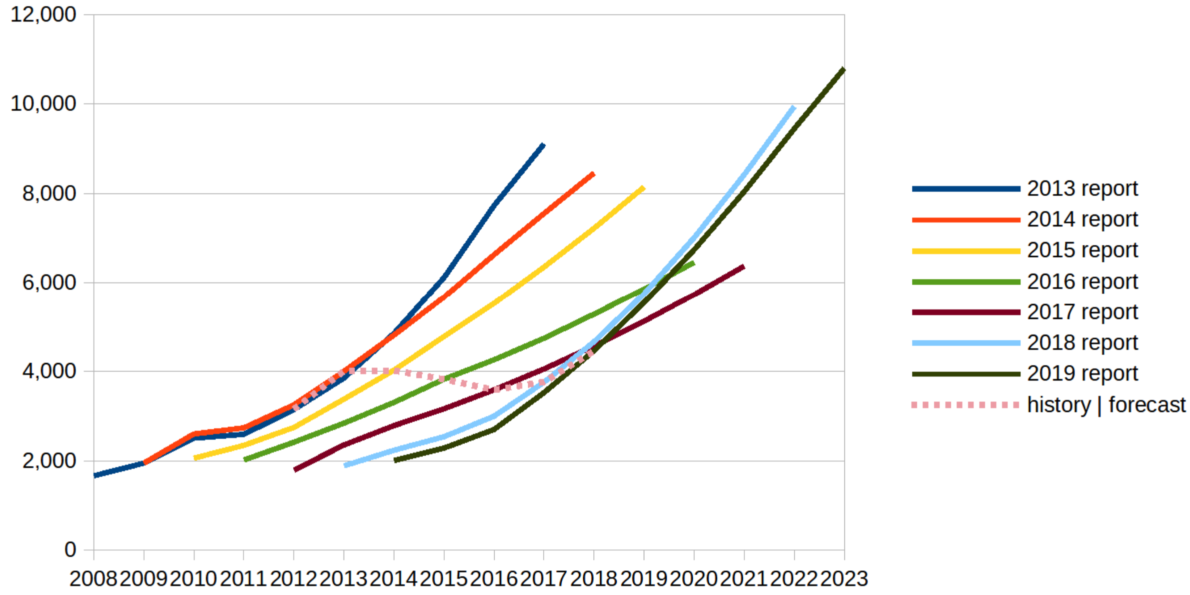
U Activities of extraterritorial organizations and bodies

GRAND TOTAL

Excursion on the perils of relying on other figures than national statistics: Example from Nigeria

Debates around the creative industries in Nigeria have been influenced by forecasts of entertainment and media spendings drawn up by one of the big international accounting firms. Jobberman 2021 (p.39), for example, directly refers to the firm's report of 2015 which forecasted media and entertainment spending in Nigeria to reach USD 8.1 billon by 2019. As these forecasts reach the media, it appears, self-reinforcing feedback loops arise between stakeholders who are repeating the same forecasts between themselves whereby these messages attain a status of plausibility, if not veracity.

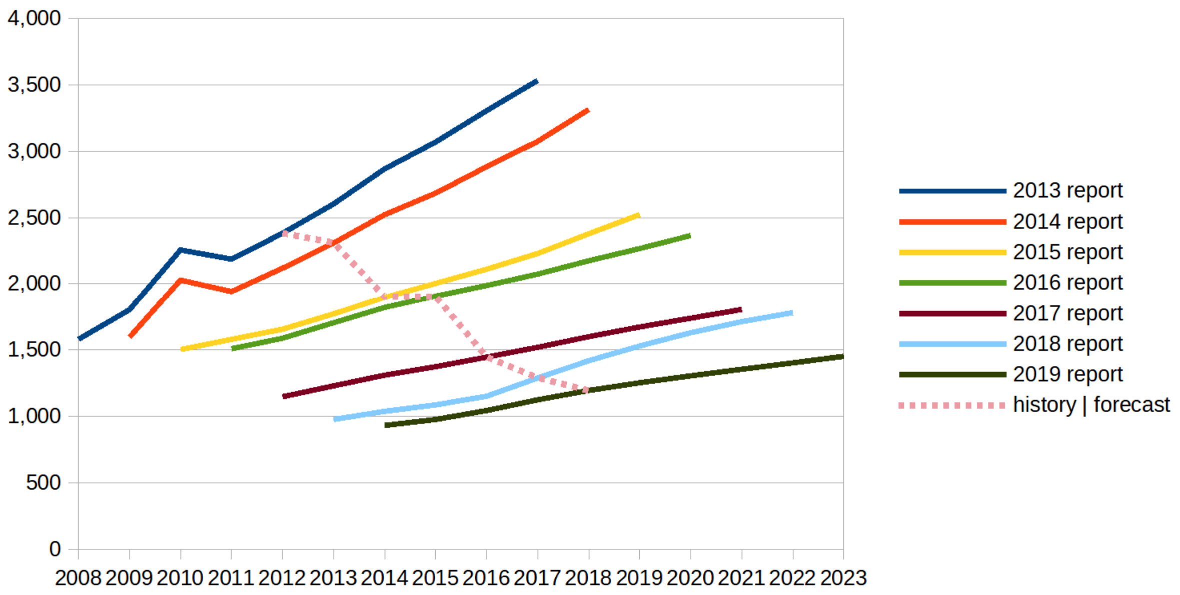
The annual trend information developed and published for the media and entertainment market in Nigeria in current USD millions is displayed in the graph below. It contains the historical data and the forecasts which are informed by these data for each year of publication.



G.A*28* Evolution of forecasts for media and entertainment 2013-2019.
Source: Own calculations based on PwC [annual], various years.

The first observation that can be made is that the curves are successively shifting outward on the timeline. Historical information on spending does not remain historical (i.e. established), but is retroactively modified (i.e. „updated to reflect the most recently available financial information"). This way, the historical total for spending in Nigeria on media and entertainment that was established for 2009 in 2014 (4 years after all businesses closed their 2009 accounts, and maybe 3 years after governments published the 2009 national accounts) continuously is being updated to become the historical total established for 2014 in 2019. At the same time, the USD 8.1 billion total forecasted for 2019 and extensively quoted similarly has shifted to 2021.

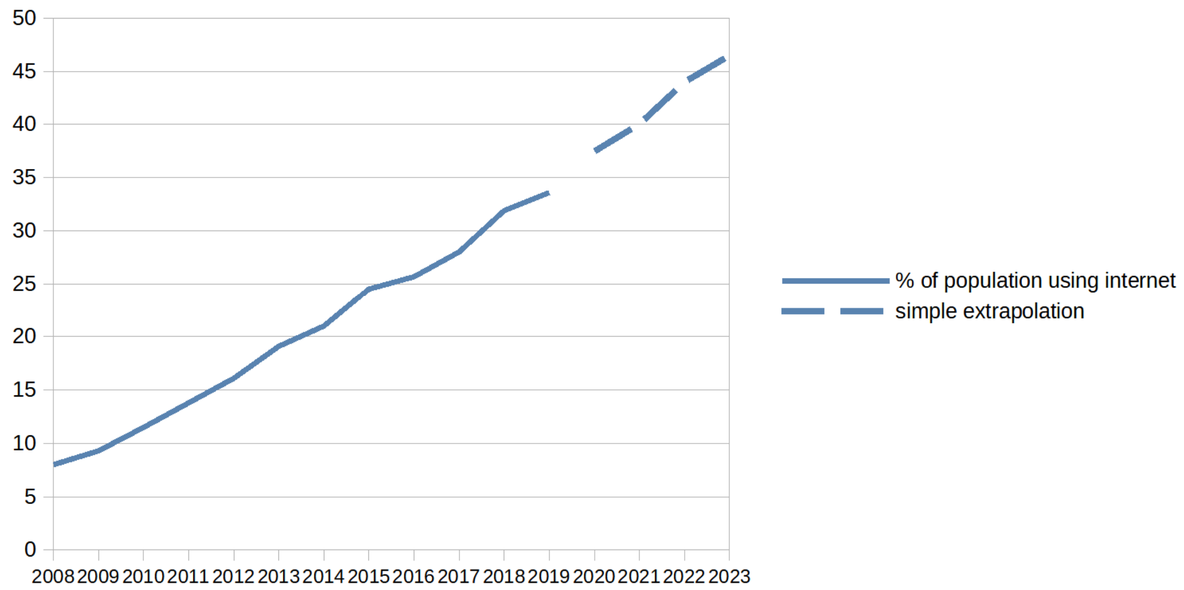
Another noteworthy observation is the fairly strong dependence of the growth forecasted on the evolution of internet access in Nigeria. Internet access is very important for the development of the creative industries because it is enabling creative entrepreneurs, *inter alia*, to find new ways of interacting with customers, delivering services to market, and developing new services. While by national economic accounts, the provision of such services is clearly classified under the heading of information and communication, it could be unclear to which extent it is part of the creative industries or rather part of an enabling environment or ecology.



G.A29 Evolution of forecasts for media and entertainment excluding internet access 2013-2019.
Source: Own calculations based on PwC [annual], various years.

This second graph above displays the shape the trend curves in USD millions of the reports on media and entertainment take if the single item of internet access is subtracted from the total. The result is a strong decline of the slope of the curves. Growth is not as impressive anymore as the steep curves resulting from the totals. It is certainly not hidden from the readers of the reports that internet access is the most important „driver" of growth in Nigeria's media and entertainment spending. But casual readers may not necessarily understand the implications. When the share of internet access is excluded from the media and entertainment spending, the starting point of our historical data for 2009 in the 2014 report is actually higher than the updated forecast for 2023 in the 2019 report: an interesting development that in reality usually does not exist for a growth trajectory that is presented as completely uninterrupted.

The final graph below displays the effective development of internet access for Nigeria's population during the periods of reference („historical and forecast") in the media and entertainment reports mentioned above. This latest data available with the International Telecommunication Union (ITU) begins with 8.0% of the population in 2008 and ends with 33.6% of the population in 2019. It shows a continuous and reliable expansion of access over the last decade and is likely to dominate the central tendency of composite indexes it is part of.



G.A30 Evolution of internet access in Nigeria 2008-2023.
Source: ITU statistics and forecast.

Interview guideline

Because there are still many ‚white spaces' in our mental maps of the creative industries and statistics tend to be incomplete in many countries, a selection of interviews with businesses in the creative industries are of paramount importance to obtain a proper feel for the reality in the this sphere of the economy. While empathy for the target group is important, infatuation with ‚creative work' will tend to blind interviewers to the nuts and bolts of operating or surviving in this multi-faceted field of business.

These internviews usually will not yield too much information if they are of a formal nature. As with all businesses operating in the informal sector on on its fringes, a conversational approach is usually the most effective with interview guidelines memorized and note taking limited so as to not interrupt the flow and/ or trigger anxiety with the interlocutor that they will lead to official reports. Do not expect to get perfect answers for all of your ELS questions.

Principles

- Interviews to be organized in semi-structured format. No box ticking in front of interviewees. Key questions rather memorized than read. Open discussion.
- Important to give <u>maximum space</u> for interviewees to describe from their own perspectives to escape our own "bubble" and approximate reality.

- Allow for sufficient flow of respondent's articulation and only coax towards interview corridor if interviewee is drifting too far off.
- Seek to obtain pronouncements on orders of magnitude whenever possible. If respondents feel uncomfortable in putting forward a number, demonstrate you do not depend on a precise figure, e.g. by asking: "Are we talking about 10s, 100s, or 1,000s of new employees/ businesses/ trainees...?"
- Seek to obtain pronouncements on trends (strongly increasing, increasing, neither increasing nor decreasing, decreasing, strongly decreasing) of any factor if figures are not available for any factor, and/ or on the weights (very important, important, less important, irrelevant) of any factor.
- Questions below drawn up with creative industry business owners in mind. Need to be flexibly adapted/ expanded/ limited according to other interviewees' (employees, associations, government, etc.) areas of responsibility and knowledge.

Labour market demand

- Could you explain your business model to us? No need to reveal trade secrets. We would just like to generally understand how things work in your line of business.
- Which markets are being served by your business (local, state, region/ zone, nation, foreign)? Where do you source your inputs and labour (local, .., foreign)?
- How do you assess market demand for your services and/ or products? Is your market expanding or shrinking? If it is expanding, is it expanding faster or slower than other in other industries?
- How do you assess the conditions for doing business in your specific line of business? Are there any specific constraints for growing your business? If so, what needs to change or be improved?
- If you were able to grow your business, would you (need to) employ more people to deliver your services/ products? What is the relationship between business growth and number of employees in your business? (E.g. if you had twice the amount of business, would you need twice the number of employees?)
- In your line of business, do people work continuously (or "permanently") or are people working on the basis of projects (one-off)? Are the (how many?) people who work with you employees or partners/ "self-employed"?
- Are people in this industry generally able to sustain themselves or do they also need to work on second (and third) jobs in other industries to get by?
- What was the actual evolution of your business over the past (up to 10) years? What is your expectation for the future evolution of your business (next 10 years)?

- According to the best of your knowledge, is the situation the same for other businesses in your industry? Are there differences in the situation of the industry between different states, regions/ zones in Nigeria? Which and why?
- Did the covid-19 pandemic affect your business in any (positive or negative) way. Did it influence the number of persons employed by your business?

Matching

- When you need employees, how and where do you find them?
- Is it easy to find the people you need? What kind of people are you looking for?
- Are there any intermediaries (family, private sector or government) that (can) assist in identifying prospective employees? Are their services useful or helpful?
- Are there any specific constraints you are facing with identifying and recruiting employees that should be removed or where improvements should be made?

Labour market supply

- What are occupations your type of business employs? Are (some of) these occupations widely available or hard to find?
- Independent of their availability, how do you generally rate the qualification of the people in the labour market in the occupations you employ?
- Do you train your own employees or co-workers, or can you draw on external agents like schools, colleges, TVET, universities to provide them with the skills your employees or co-workers need to succeed in your line of business?
- Is there anything that needs to be improved in order to make the labour supply more suitable to your business?
- With regard to the future, what kinds of occupations do you need to further build your business? Are there new kinds of occupations emerging and that are not covered by current (school, college, TVET, university) curricula?

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Annex 8: Tentative creative industries sub-sector SWOTs

The SWOT charts below are first sketches following the research conducted and discussions held with entrepreneurs who are active in the creative industries during the desk review period. The charts are drawn up based on business perceptions. They are proposed by the consultant as a starting point for any strategic sub-sector development discussions.

Fashion sub-sector

Nigerian Fashion Sector SWOT

Strengths	Weaknesses
• Young, dynamic fashion ecosystem with a growing buzz, especially in designer-fashion • Strong international profile via fashion showcases and increasing visibility of Nigerian designers in international markets • Rich and distinctive aesthetics (e.g. Nigerian textiles) – with fashion central to a new generation of Nigerian creative industries activity and linked to global success in music • Growing domestic market for designer-fashion, fuelled by a growth in the middle class and a commitment to 'buying Nigerian' • Dynamic fashion showcasing ecosystem – anchored by Lagos Fashion Week • Clusters with areas of specialism – e.g. shoes in Anambra • Availability of low cost labour in areas such as tailoring and leather work	• Lack of validation of fashion as a serious career option • Limited provision of fashion education and skills in key areas – e.g. ecommerce, sourcing, circular economy • High cost of locally produced textiles – undercut by Chinese imports • High levels of informal / grey economy work – e.g. in tailoring and sewing, with poor working conditions and exploitation • Limited access to the full range of skills required to drive fashion development in an increasingly digital and interdisciplinary environment • IP / copyright infringement • Limited spending power of Nigerian market • Access to finance across the value chain • Lack of specialist support – e.g. legal, and business advice • Lack of R&D in new technologies and materials, limiting innovation
Opportunities	**Threats**
• Global growth in the fashion sector – with room for Nigerian fashion companies to expand • Growing domestic market for fashion created and made in Nigeria	• Political instability • Continued Covid-19 impact • Government regulation – e.g. tariffs on hardware

● Increase in digital infrastructure / innovation – with opportunities for Nigerian fashion ecommerce ● Increased awareness of creative entrepreneurship and creative career opportunities ● Innovation: e.g. wearable technology and sustainable fashion ● Increased consumer awareness of fast fashion and its environmental impact – toward a commitment to sustainable and locally produced / sourced fashion ● Clusters and networks: increasing formalisation of fashion companies and professional exchange.	● Lack of enforcement of IP law ● Environmental issues – e.g. caused by dyeing, fast fashion, limited re-use ● Lack of investment in training and skills ● Lack of investment in business support and growth finance ● Loss of talent – to markets where fashion offers better career prospects.

Games development / esports sub-sector

Nigerian Games Development / Esports Sector SWOT

Strengths	**Weaknesses**
● Young, dynamic, digitally literate population ● Fast-growing use of smart phones – driving up demand ● Recent growth in esports and gambling platforms, which require some similar technical and creative competencies for games development / esports ● Distinctive Nigerian aesthetic – inspiring a new generation of original Nigerian games ● Growing creative industries sector overall, with games companies extending from growth in music, film and wider ICT sectors	● Lack of validation of gaming as a serious career option ● Association with gambling – with negative connotations for many Nigerians ● Limited provision of technical or managerial education and skills across all areas ● Limited digital infrastructure in rural areas ● Limited access to affordable hardware – e.g. for console games ● Limited access to the full range of skills required to drive games development ● IP / copyright infringement ● Limited spending power of Nigerian market ● Access to finance across the value chain ● Lack of specialist support – e.g. legal, and

<table>
<tr><td></td><td>business advice
● Lack of R&D in new technologies, limiting innovation</td></tr>
<tr><td>Opportunities
● Global growth in the games sector – with room for Nigerian games companies to expand
● Growing domestic market for digital content
● Growing international market, including via the Nigerian diaspora
● Increasing Internet and Mobile penetration, enabling games production and development in different parts of the country
● Increased coordination and collaboration for games development companies
● Increased awareness of gaming as a tool for education (serious games)
● Increased awareness of how games can tell distinctively Nigerian stories and showcase Nigerian aesthetics
● Increased awareness of creative entrepreneurship and creative career opportunities
● Innovation: e.g. growth of extended reality (VR, AR etc.), with gaming central to new technologies across the creative industries
● Clusters and networks: increasing formalisation of games companies and professional exchange.</td><td>Threats
● Political instability
● Continued Covid-19 impact
● Government regulation – e.g. censoring certain types of games development
● Lack of enforcement of IP law
● Lack of investment in training and skills
● Lack of investment in business support and growth finance
● Lack of government and corporate investment in R&D – in particular Extended Reality and Creative technology
● Import tariffs on hardware
● Loss of talent – to markets where games development offers better career prospects.</td></tr>
</table>

Annex 9: Job profiles for skills development

Fashion sub-sector

Pattern cutter

The role of a pattern cutter exists in fashion houses in Nigeria. Pattern cutters are employed in the textile industry, in a design studio or workroom at home or within a factory.

Description of Role

The role of the pattern cutter involves translating the ideas of the designer into patterns that are relatable and repeatable as well as managing the process of garment manufacturing to ensure that the team works with accuracy and speed

Responsibilities

- Interpreting and reading designs models and blueprints
- Creation of rough draft templates using a computer drafting software/ freehand sketch
- Measuring, cutting, and designing patterns
- Collating dimensions of patterns according to their sizes whilst also considering the elasticity of the fabric
- Double-checking patterns to ensure they fit dimension and style
- Reviewing the final product together with the designer and production officer
- Purchase supplies for pattern making

Requirements

- Experience with measuring and cutting tools
- Previous work experience as a pattern maker and / or corset making
- Possess relevant educational requirements – ideally with a minimum of tertiary training and with 2 years of work experience
- Attention to details
- Ability to meet deadlines
- Physically fit enough to stand for long hours

- Organizational and leadership skills
- Good knowledge of a broad range of fabrics
- Good Communication skill

Garment merchandiser

Description of role

A garment merchandiser acts as a link between customers and the fashion house. S/he oversees the roles of purchasing raw materials, making garments, finishing garments, preparing invoices and other official documents, and then finally shipping the product to its destination

Responsibilities

- Overseeing internal and external communications
- Developing samples fitting to customers' specifications
- Preparation of official documents/order sheets
- Booking all kinds of trimmings and accessories to meet customers' demand
- Preparing purchase orders
- Supporting production and quality assurance department
- Inspecting products before shipping
- Following through with shipments

Fashion buyer

A fashion buyer is responsible for assisting fashion houses to discover the latest trends in the fashion industry. They are responsible for purchasing new products and negotiating with suppliers. They typically work with clothing retailers.

Responsibilities

- Setting retail prices for outfits sold in fashion houses
- Developing sales strategies and managing marketing and promotional campaigns
- Keeping up with trends and competition in the industry
- Maintaining relationships with suppliers

- Inspecting products
- Overseeing budgets

Requirements

- Excellent communication skills
- Attention to details
- Ability to work in a team
- Ability to communicate effectively
- Good negotiation, interpersonal, and analytical skills
- Good organizational skills
- Critical thinking and problem-solving skills

Visual merchandiser

A visual merchandiser is responsible for maintaining and coordinating operations in fashion stores, managing teams and providing solutions to problems. S/he is responsible for ensuring that clothes are properly styled while also ensuring customers are satisfied. Visual merchandisers work to promote retail brands, products and services onsite and online. They can also work closely with museums, galleries and fashion stores. However, this is an emergent field in Nigeria.

Responsibilities

- Providing strategic direction & leadership to Visual Merchandising & Styling Team
- Partnering with the Retail Sales & Operations, e-commerce, Brands & Marketing, Category, Product Development Teams to ensure business objectives are met
- Responsible for creating and implementing a visual merchandising and styling strategy per store
- Using artistic skills or computer-aided design (CAD) packages, such as AutoCAD, Mockshop or Adobe Creative Suite, to create visuals and plans
- Ensure all timelines are set and followed by the creative team and external stakeholders
- Train store sales team on product specifications and how to use product collection line sheet in up-selling and cross-selling to customers on the shop floor.
- Prepare and update fashion product knowledge training pack

- Communicate the product matching stories to the store team for each seasonal business cycle
- Change window display according to theme /cycle and send the image to all stores as a guide to ensure uniformity.
- Accountable for the management of merchandise for photo-shoot events and also follow up with warehouse to make sure documentation and movement of picked merchandise from stores are done in time way before the shoot and also returned
- Responsible for sourcing for photoshoot venues
- Research lifestyle and design trends that will inform the visual merchandising & styling strategy.
- Conduct research on international brands and benchmark organizational merchandising & styling strategies

Requirements

- Relevant experience in retail management
- Experience in visual merchandising
- Knowledgeable in fashion retail store fitting, furniture, and facilities
- Proficient in creating a wide range of fashion styling looks
- Experience in photo-shoots and product image looks creation
- Good creativity and imaginative skills
- Ability to work together with teams
- Knowledgeable in the areas of appropriate colors to combine
- Attention to details
- Hands on experience in photoshop, illustrator
- Good interpersonal and communication skills

Studio manager

A studio manager within the fashion house handles styling of outfits, ensures that images, and description of items are in proper conditions when they are uploaded onto the internet.

Responsibilities

- Ensures that clothes for display are styled in attractive way

- Coordinates activities relating to the online product display
- Define customer segments
- Collaboration with suppliers
- Observe and work with latest trends

Requirements

- Degree in business management or any relevant business development and management course
- Working experience in marketing environment
- Good sense of style and knowledge of fashion
- Good knowledge of Microsoft Office Suites
- Understanding of the online environment

Games development / esports sub-sector

Games developer

Implements and iterates on game features to create a rewarding customer satisfaction

Responsibilities

- Writing clear codes that are portable and maintainable such as C++ and C#
- Writing refactor codes to improve the design of old and existing codes
- Produce the audio features of the game, such as character voices, music and sound effects.
- Collaboration with lead programmers to design gameplay systems
- Pro-active communication with art and design

Requirements:

- Minimum of 2 years of professional game programming experience using any suitable language
- Bachelor's degree in computer science or related field
- Experience developing for multiple platforms (OSX, Windows, PS4, XBox One)

- Experience developing gameplay-related systems for games
- Good organization and time management skills
- Strong communication skills and ability to collaborate with teammates
- Self-motivated, able to work with minimal direct supervision
- Comfortable working within a team environment that encourages strong software engineering, coding standards, and code reviews

3D character animator

A 3D animator transforms content to 3D animations using animation software that will be delivered in digital format across websites and apps. The animator also works with different specialist software packages which are used to create and animate characters, and add scenery.

Responsibilities

- Collaborating, coordinating and participating in multi-media content development projects - including concept, copy, final output and distribution
- Defining the animation style and workflows for new products under the supervision of the Producer
- Active and direct participation in game creation process through collaboration with design team.

Requirements

- Ideally minimum of Bachelor of Art or Science with focus on animation. However, intensive tertiary education can also facilitate the required skills levels if coupled with work experience / internships.
- Excellent verbal and written communication skills.
- Ability to follow through with storyboards and design references accurately and work in a range of styles.
- Working knowledge and experience with a 3D animation software such as Cinema 4D, Maya, Motion Builder or Blender is a needed.
- Good understanding of Motion capture tools and integration.
- Good knowledge of Adobe After Effects, Premiere Pro and Photoshop
- Good planning and time management skills.

User experience designer

Responsibilities

- Act as a strategic thought partner in product, design and development teams to deliver best-in-class product features.
- Understand the end-to-end customer journey, identify pain points, and propose solutions.
- Design complex navigation flows, turn functional requirements into simple user journeys.
- Conduct user research and testing, constantly engage with users and validate design hypotheses.
- Translate user research and feedback into process flows and wireframes in a quick, iterative and agile environment.
- Collaborate with developers to review designs, discuss product features and implementation.
- Redesign websites to make them more responsive
- Redesign or create mobile apps that are easy to use and configured appropriately for smartphones and tablets
- Keep up to date with technological innovations and new tools.

Requirements

- Experience in user centered design, can leverage data and research insights to identify user needs and produce intuitive, useable interfaces
- Minimum 2-3 years professional UX Design experience
- A strong portfolio that demonstrates experience designing for digital products from initial concept through to implementation
- Excellent understanding of user-experience design for mobile devices
- Skilled with prototyping tools such as Sketch, Figma, InVision, Adobe XD.
- Experience with B2B SaaS solutions

Esports producer

Esports producers make it possible for esports fans to see the thrills, the spills, the winners and the losers during esports tournaments. They are responsible for coordinating and planning broadcasts, crafting them and making them happen.

Responsibilities

- Produce a selection of shows, a daily live news show, listicles, a live weekly one-hour esports analysis show
- Manage remote crews and HQ coverage of live esports events
- Participate in production meetings and help set programming budget, vision and strategy
- Manage the gallery during live feeds and produce live tournaments
- Embed social and digital content in production process
- Think internationally when prepping shows, securing hosting talent and stringers

Requirements

- Experience in product management
- Experience in esports or gaming industry
- Experience in supervising the full lifecycle of product management
- Experience leading cross functional teams

Animator

Responsibilities

- Collaboration with media and production teams.
- Create concept sketches and models that assist with development and selection of final characters and scenes.
- Create digitally animated images based on concept, narrative, and character profiles.
- Manage multiple projects within design specifications
- Review content developed by other team members to ensure quality.
- Using tools to create intriguing, engaging and comprehensible products
- Creating digitally animated images based on concept, narrative, and character profiles.

- Working with cinematographers and sound designers to produce interactive video lessons
- Using technical software packages, such as Flash, 3ds Max, Maya, LightWave, Softimage and Cinema 4D

Requirements

- Bachelor's Degree in Fine Arts, 3D animation, or a related creative field.
- Minimum experience of 2 years in motion design
- Proficiency using tools such as After effects, Premiere pro, Illustrator
- Comprehensive understanding of design and animation principles.
- Excellent storytelling skills, and the ability to deliver messages with empathy and reason.
- In-depth knowledge and experience in layouts, animation fundamentals (including character animation), special effects, and typography
- Experience with character animation
- Strong analytical and technical skills along with artistic talent
- Time management and organizational skills to meet with deadlines and thrive in fast paced environment
- Attention to detail
- Tech/Internet savvy with advanced proficiency with Microsoft office and Google suite applications.