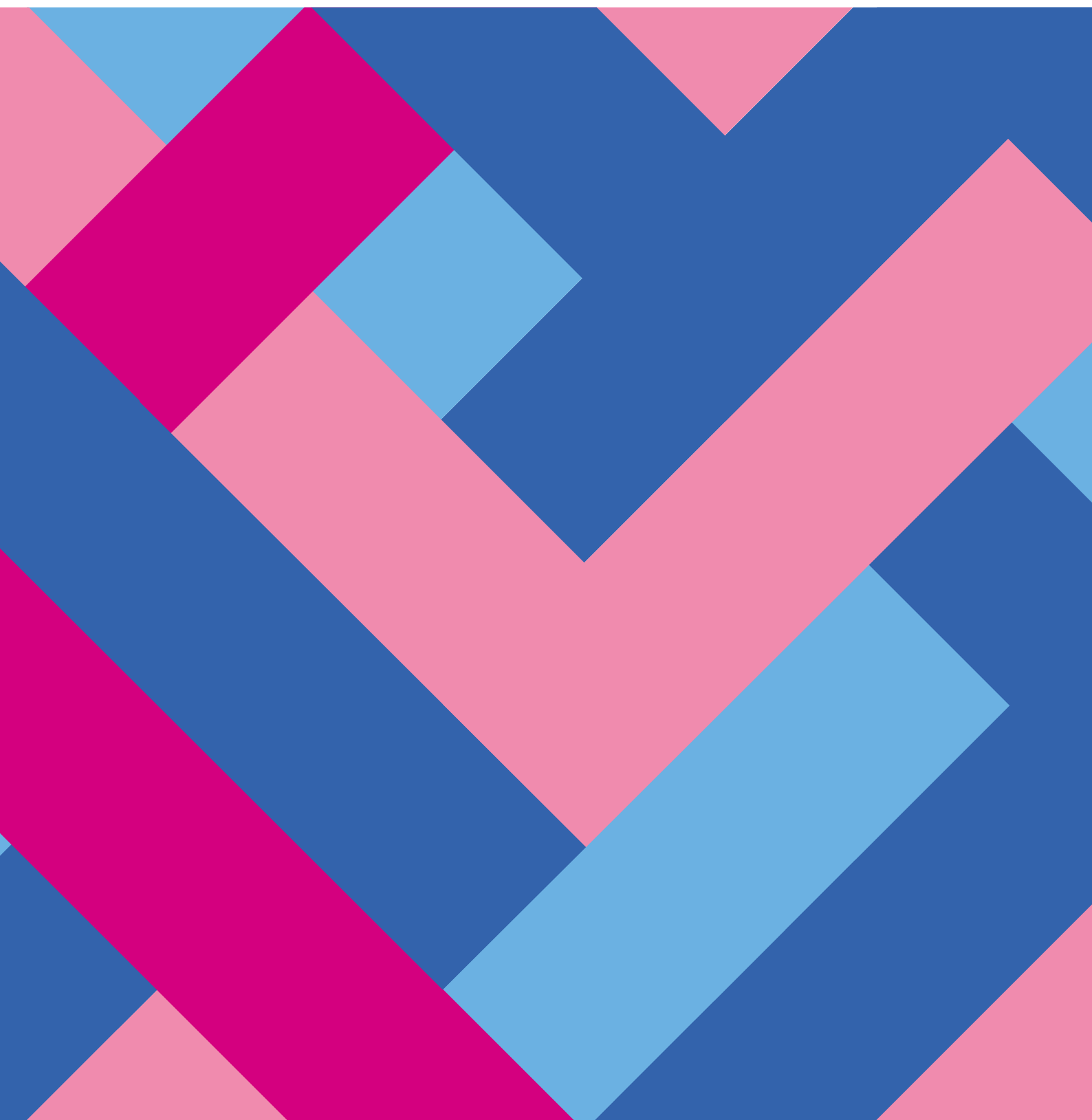# Cultural Skills research summary – Sub-Saharan Africa

Examining the skills gaps and opportunities in
Kenya, Nigeria, South Africa and Zimbabwe

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About this report

This research was undertaken by the Cultural Skills team at the British Council. Research was conducted across four countries in Sub-Saharan Africa, and was conducted by the Cultural Skills team Regional Research Manager in Kenya, Nigeria, South Africa and Zimbabwe. It aims to contribute greater understanding of the skills gaps and shortages across the cultural and creative sectors in the region. The research included interviews with 119 experts, including sector practitioners, policymakers, British Council colleagues, educators, cultural institutions, independent organisations and young people either studying or attempting to enter the sector. To gain insight from a broader sample, an additional 15 focus groups were conducted and an online survey was completed by 251 cultural sector professionals across the four countries.

Findings from this paper will be used to support the British Council's Cultural Skills and country teams in developing new evidence-based programmes and products that consolidate and complement existing skills activity. It also provides insights into potential partners and co-investors for programme development.

It is important to note that the research was subject to limitations and uncertainties that are beyond our ability to control or estimate precisely. Subsequently, it is not meant to be a comprehensive mapping of the cultural sector in each focus country, but rather provides illustrative and informative insights into emerging skills gaps and shortages.

Acknowledgements

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Disclaimer

The opinions expressed in this report are those of the author and do not necessarily reflect those of the British Council or of any organisation mentioned. Every effort has been made to ensure the accuracy of the information contained in this paper, however, the research is subject to uncertainties that are beyond the author's ability to control or estimate precisely. Neither the author nor the British Council assumes any warranty for the accuracy, completeness or use of the findings. Readers are responsible for assessing the relevance and accuracy of the content of this research.

Foreword

From museums to music, fashion to film, the skills that support the artistic process are essential to the development of a thriving cultural sector. Skills range from technical specialism, to leadership and management to policy and qualification development, to youth engagement and English language.

The Cultural Skills team strengthens cultural relations between the UK and the rest of the world through sharing knowledge and developing mutual benefit. With partners in the UK and internationally we build sustainable cultural skills programmes that develop the skills of those practitioners and institutions across the whole of the UK and internationally, supporting the artistic, social and economic benefits of a thriving and dynamic cultural sector.

The powerhouse that is the Sub-Saharan Africa region has long been known for its creative production and artistic contributions to the international arts and culture scene, providing fantastic potential opportunities. This report provides the first steps for the Cultural Skills team to engage with the region around international best practices, working in collaboration with regional experts to promote and strengthen professional skills across the sector. With a large but vulnerable youth demographic, the potential for impact through skills development, better graduate preparedness and showcasing of African success stories is great.

Simon T Dancey
Director, Cultural Skills team

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The creative industries, arts and culture are coming of age in most African countries and are arguably the most dynamic sectors in these economies; from Nollywood and Riverwood to Bongowood, the continent is glued to their television screens watching local narratives produced by local artists.

Africa's creative economy practitioners are breaking the glass ceiling to make their mark in the international entertainment and media space – from Kenyan visual artist Cyrus Kabiru; South African designer of MaXhosa, Laduma Ngxokolo; Nike Davies-Okundaye, founder of Nike Art Centre; Reni Folawiyo, founder of 'Alara'; Ethiopian photographer Aida Muluneh; Amaka Osakwe, lead designer at Maki Oh; Ndebele painter Esther Mahlangu; Zimbabwean actress and playwright Danai Jekesai Gurira; Kenyan actress Lupita Nyong'o; Nigerian writer Chimamanda Ngozi Adichie; to Trevor Noah, among other constellations of artists.

Analysts and commentators in major global publications have attempted to describe this creative renaissance. The sceptics have accepted it as an **emerging market boom** while the overly optimistic are celebrating the sector as one of the **world's fastest-growing entertainment and media markets**. While opportunities for new growth are exciting for practitioners, it is also true that the tremendous success is built on an entrepreneur-driven model; this produces great success for leading practitioners, but is also occasioned by massive skills gaps, infrastructure deficits and low coverage by public policy – which may limit the growth potential after the initial surge.

In order to secure the future growth potential of Africa's creative industries beyond today's successful practitioners, create a sustainable talent pipeline and further deepen our footprint in the global marketplace, it becomes our responsibility to review our ecosystems, identify the transformation opportunities and build the partnerships for our future creative industries.

I am convinced that improving our skills inventory is a sure strategy to increasing the quality and competitiveness of our cultural products in the global marketplace and fully utilise our demographic and technological dividends.

This generous research is an attempt to review the skills inventories of the cultural sector in our different countries, a tool to build the necessary partnership, as well as to create opportunities to develop transformational interventions. It is my hope that by focusing on this vital but often hidden sphere of activity and value, the creative economy ecology in Africa will benefit today and in the future.

Gachara

George Gachara

Introduction to the research

As part of the Cultural Skills global report looking at the trends in skills gaps and opportunities across the cultural sectors, research has been conducted in Sub-Saharan Africa to explore the skills gaps and shortages in the cultural, creative, and heritage sectors.

This piece of research provides an initial understanding to inform future skills training programmes and products for professionals and young people across Kenya, Nigeria, South Africa and Zimbabwe.

In collaboration with British Council offices in each of the countries involved, anecdotal evidence and preliminary conversations with cultural and creative professionals identified potential opportunities to provide programmes with an impact for the cultural sector in each country. As such, the research project had the following objectives:

— Identify the technical and cross-sector skills gaps in the sectors.

— Locate the professional shortages.

— Collate the current provision in educational and skills training for the sectors.

— Identify the market demand for programmes for professionals and young people.

— Understand and outline the relevant cultural policies and operations frameworks.

— Understand the business models and the needs of creative hubs.

— Identify areas of potential impact by the British Council from professionals in the field.

— Identify potential partners and co-investors.

— Identify the most appropriate business model for future programming.

— Provide recommendations on programme topics and structure, as well as target audience.

To respond to the preliminary identification of a potential opportunity in country, a researcher from the Cultural Skills team worked alongside British Council colleagues in each country to develop the research tools, aims, and methodology. This research will inform prioritisation of skills needs and development of various programmes. The research methodology included desk research, in-depth interviews, focus groups, and online surveys. Overall, we conducted 119 interviews with experts, 15 focus groups, and collected 251 online surveys.

This research is intended to provide a snapshot of the challenges facing the cultural sector in different countries. Given the breadth of this research, we don't anticipate that it can provide all of the detail we need to develop tailored programmes which respond to the specific requirements of the cultural sector in each country. However, this research, alongside other reports produced by the sector, provides us with guidance with which to identify focus areas for programme development, and identifies where further research is required. Where necessary we will look to undertake more focused, specific research to further deepen our understanding and build our knowledge base. We are committed to making this research publicly available for use by the cultural sector across the globe.

It is important to note that due to limited resources, this research does not delve into all sub-sectors within the cultural sector, and does not explore every major city in every country. As such, this research is not a mapping or scoping exercise but rather provides illustrative information to be used for future programmes development. In each of the four countries, we explored the following sub-sectors in these cities:

— **Nairobi, Kenya:** film, fashion, and creative hubs.

— **Nigeria:** across all art forms and festivals in Abuja, Lagos and Calabar.

— **South Africa:** across all art forms and creative hubs in Johannesburg and Cape Town.

— **Zimbabwe:** the museums and cultural heritage sector in Harare, Bulawayo and Gweru.

Introduction to the region

Growth and potential define the Sub-Saharan Africa region. Countries across the region continue to grow economically and stabilise their political and democratic processes. Economies are increasingly opening up to neighbouring countries, Europe, the UK and looking eastwards, while alongside this development many countries are also working to counter the effects of terrorism threats.

The slowdown in major emerging markets including Nigeria and South Africa, and rising borrowing costs are compounded by domestic problems, including severe infrastructure constraints and terrorism threats. The lack of macroeconomic policy reform measures are forecasted to continue contributing to the weakening economic situations, especially over the short term. However, in 2018, GDP growth is projected to pick up to 3.2 per cent for the year, as prices stabilise and supply constraints ease.[1] This growth is predicted despite the decline in commodity prices, including oil, agricultural goods such as coffee, and metals, many of which are relied on in the region, and has affected economic growth substantially since 2014.

Additionally, recognising the need to move away from reliance on resource and commodity-driven economies and towards other contributors to economic growth has become a pivotal moment for the cultural and creative sectors in Sub-Saharan Africa. Governments are realising the potential for cultural and creative sectors to contribute positively towards economic growth. With some difficulty in obtaining data on the current contributions across the region, estimates place its future potential at ten per cent of GDP within the next ten years.[2]

As the largest demographic, young people aged 18–35 are the highest priority socio-demographic group in the Sub-Saharan Africa region. Of the world's top ten countries with the youngest populations, eight are in Sub-Saharan Africa, and the World Bank estimates that by 2050, the region will be home to all ten.[3] Economic opportunities and challenges directly affect this group in every corner of the continent. The potential for creating impact for young people entering the cultural and creative sectors can be harnessed through the showcasing of African success stories, enabling greater understanding of career paths in the sectors, providing increased graduate preparedness through skills training, and increasing exposure to international best practice and UK expertise in both the cultural sector and education.

1   World Bank, Global Economic Prospects Sub-Saharan Africa.
2   HEVA Fund.
3   http://blogs.worldbank.org/africacan/7-facts-about-population-in-sub-saharan-africa

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Strengthening the sector in the region will have a direct impact on the socio-economic situation, the employability of professionals and young people, and on the function of the sector as a tool for economic growth and social change. Hence, the British Council Cultural Skills team aims to contribute towards the professionalisation of the sector through providing specialised training opportunities which address the skills gaps and shortages identified in this research study.

Impact through skills training and capacity building revolves around three main focus areas in this region: skills to enable monetisation of talent, cultural goods, and creative services; professionalisation of existing skills;

and provision of exposure to international best practice through collaborations with in-country partners which take into consideration the regional context, histories and unique challenges.

This report sets out to provide an overview of the skills gaps and shortages affecting the cultural and creative sectors in Kenya, Nigeria, South Africa and Zimbabwe, as a snapshot into the region. Additionally, the report outlines findings on graduate preparedness, current skills training provision, and some risks and challenges affecting the sector, and identifies appropriate programme formats and business models for future British Council programmes.
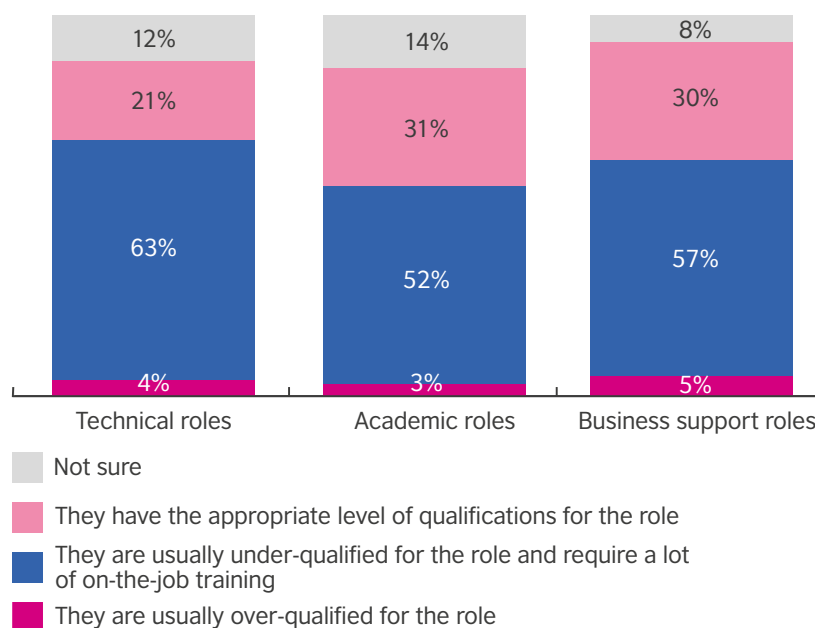
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Key findings

Graduate preparedness for work

When asked how well qualified school and university leavers are for roles in different areas of the cultural and creative sectors, the majority of survey respondents and interview participants across the four countries of research identified that young people are usually under-qualified for their roles and require a lot of on-the-job training. Participants explained that while graduates generally have the appropriate level of qualifications for academically focused skills such as curating and archiving, they are under-qualified for business support roles (such as marketing and business development) as well as for technical roles (such as exhibition design and sound engineering).

Figure 1: How well qualified are school and university leavers for work in the cultural sector?

Technical roles: Not sure 12%, appropriate 21%, under-qualified 63%, over-qualified 4%
Academic roles: Not sure 14%, appropriate 31%, under-qualified 52%, over-qualified 3%
Business support roles: Not sure 8%, appropriate 30%, under-qualified 57%, over-qualified 5%

Legend:
- Not sure
- They have the appropriate level of qualifications for the role
- They are usually under-qualified for the role and require a lot of on-the-job training
- They are usually over-qualified for the role

Sample size: 199 respondents.

Through focus group discussions, young people studying for roles in the sector or those who are attempting to enter the sector often cited a lack of relevant practical experience opportunities, including internships and apprenticeships, across the sectors. Additionally, many young people were not able to identify the career paths within the sector, especially when it came to technical and business-support roles. Finally, they felt societally discouraged as the cultural and creative sectors are often seen as both non-professional and not providing economically viable careers.

Through in-depth interviews, sector professionals identified that there are three main reasons for this lack of adequate educational preparation. They identified outdated curricula, a focus on theoretical education without enough practical experience and a lack of available programmes at tertiary-level institutions. Additionally, participants highlighted the challenges around access for marginalised communities due to country histories and contextual backgrounds which often systematically and financially discourage certain young people from entering the cultural and creative sectors on a professional level.

Impact through skills development programmes for young people in Sub-Saharan Africa can be greatly enhanced through increasing graduate preparedness to work in the cultural and creative sectors with skills training, identification of career paths which would transform societal perceptions on the viability of career options in the sector, and the showcasing of African success stories.

Skills gaps and opportunities

A cross-analysis of the skills gap and opportunities across the four countries of this research reveals some common areas of potential impact, which are technical discipline-based skills for the film, fashion, museums and festivals sectors; cross-sector skills for business and financial support roles, the use of social and digital platforms, and creative entrepreneurship skills; development of business skills for creative hub managers; and a focus on cultural leadership and policy advocacy skills at a senior professional level.

Technical discipline-based skills

Based on our focus on the film, fashion, museums and festivals sectors, the following technical discipline-based skills gaps were identified. When it came to the film sector, interview participants explained that while many of the basic sound and light skills exist, the mid-career, professional and heads of department for senior creative-focused roles are lacking. Specifically, film editing and post-production, sound engineering and design, colour grading, content production, music and score, lighting design, special effects make-up and costume design were all seen as skills gaps. Others in the film sector highlighted that the more creative-focused skills, including story development, storytelling, character development, creative production, scriptwriting, directing, production and acting techniques, were also missing. When it came to the fashion sector, participants identified that there is an increasing need to build on previous research conducted on the fashion value chain by creating practical learning opportunities for those entering the sector and those currently working in it. Fashion value chain management, including pricing, costing, valuation, design aesthetic, line sheet production, look-book photography and creation, production at scale, sizing metrics, garment care, retail shop and sales skills, logistical management, and branding and marketing were all highlighted as skill gaps in the sector.

Additionally, some technical skills gaps were identified across all cultural sectors. Specifically, sound engineering, mixing and recording were identified as missing skills which would have a strong demand for training, especially for young people entering the sector. Participants also explained the necessity of understanding sound engineering for indoors spaces such as theatres as well as outdoors venues, such as on stage during festivals and shows. They also identified that lighting design is also largely missing, with basic lighting skills currently available but a shortage of professional designers with international standards.

When it came to the festivals and events sector, management skills gaps were highlighted. This includes exposure to international best practices in the festivals sector, business planning and monetisation, venue and logistics management, sustainability modelling, artist management, technical stage skills, innovative and efficient utilisation of indoors and outdoors spaces, interactive spaces, online sales, making marketable content, sponsorship and private sector investment, effective use of social media, branding and positioning, audience development and engagement during the off-season, and market segmentation and targeting.

Within the museums and cultural heritage sector, with a specific focus on Zimbabwe, the following skills gaps were identified: museum management skills for senior-level professionals in the sector, curatorial and collections display management skills to enhance the capacities of the professionals already in place, exhibition development and design, and innovative international best practice in the areas of documentation, conservation, preservation and restoration. Most participants identified the importance of storytelling as part of the exhibitions development process. This is a skill which participants felt is missing almost entirely. While this could be an interesting area of a skills training programme, it must take into consideration the local context, history and what many participants coined 'telling the Zimbabwean story'.

Cross-sector skills gaps

Interview participants, especially mid-career professionals, were keen to highlight the necessity of improving business and financial skills across all cultural sectors. This skill was highlighted as a gap for both creative practitioners as well as those working in the sector in business support roles. When explaining what they mean by business and financial skills, participants highlighted the importance of understanding sector-specific value chains, business planning, financial management (including pricing, budgeting, taxes, accounting and forecasting), scope and growth of a business, sustainability modelling and planning, and client relations and corporate sponsorship.

Another cross-sector skills gap which interview participants identified as lacking in the sector is the ability to make effective use of social and digital media platforms to utilise audience development and engagement. While participants identified that most professionals and young people in the cultural sectors know how to use the various marketing platforms, they have not learned how to create full marketing strategies around them, and have not learned how to develop a narrative, or storytelling approach, to their products and services. Some participants highlighted that social and digital marketing is currently used only as an afterthought, or as a secondary tool, whereas a strong marketing strategy which utilises the available social and digital media platforms from the beginning of any project would create real impact on creative projects delivered, and should be integrated within all project development and distribution aspects in order to truly increase audience engagement and promote cultural goods, assets and services.

Finally, research participants explained that creative entrepreneurship skills were often lacking, especially for young people wishing to enter the sector as well as for emerging creatives. This skill set was explained by interviewees as including legal competencies (such as contracting and rights), business and financial entrepreneurship skills, audience building and engagement, and accessing local and regional markets. It also includes more specific topics mentioned like quoting and pricing, valuation of work, costing, understanding the project's place within the competitive market and commissioning prices.

Creative hubs

Hub managers we spoke with in Nairobi, Kenya and the two cities in South Africa identified that their main challenge is identifying a working business model which does not tax the community members too much but also allows them to cover their business needs and offer the services they would like to offer. Other participants highlighted that what hubs are truly missing are strong marketing strategies which would attract the attention of a larger potential user base, and would enable those operating in the wider cultural and creative sector to better understand and access them. Finally, the sector-specific approach of some spaces was deemed by both hub managers and non-participating practitioners as an opportunity

to develop expertise but also as something which could be enhanced if the hubs became truly creative and multi-disciplinary in their membership. Research participants explained that to support this growing and dynamic part of the creative sector, there should be a focus on skills training for creative hubs managers on business development and planning, income generation, corporate partnerships and sponsorships, innovative approaches to combining maker spaces and working spaces, artist and community management, and utilised digital marketing skills.

Senior-level professionals

Across this research, there was a need identified for specialised programmes for senior-level professionals in the sector. Participants spoke of the need to gain a stronger understanding of cultural leadership. Current leaders identified that this kind of skill set needs a two-pronged approach. The first works with current cultural leaders to refine and progress their artistic visions towards a more conducive and inclusive cultural landscape, encompassing more than the previously held ideas of arts for social cohesion. The second works with emerging cultural leaders to enable their understanding of an impassioned artistic vision which is also combined with sound organisational management and leadership skills.

Additionally, research participants from the sector often identified the gap between the sector and the relevant government bodies involved. Many emphasised that an increase in policy dialogue and development would enable the relevant parties to understand each other better and enable them to work together in a more positive way, bringing together various stakeholders and focusing on the implementation and operational frameworks of new policies. Sector professionals highlighted that policy advocacy and development skills are needed for mid- and senior-level professionals and would be beneficial for the sector as a whole.

While not a specific skill, exposure to international best practice was often highlighted as an important missing area. Interview participants strongly emphasised that there are not enough opportunities for professionals in the sector to learn about benchmarks around the world to enhance their standards and reach an international level of both creative production and quality.

Impact through skills training in this region should focus on collaborations between UK and country expertise around skills to enable monetisation of talent, cultural goods and creative services; professionalisation of existing skills and increased contribution to the wider economy; and provision of exposure to international best practices through collaborations with in-country partners. Country contexts and unique challenges, opportunities and histories should always be taken into consideration when designing the international exposure element of future programmes.

Finally, data, documentation and further research are still needed across the region. An increased availability of data has the potential to provide economic forecasting of the potential contributions which the cultural and creative sectors have on the wider economies of respective countries. This would enable more conducive relationships with the public sector around more effective cultural policies and would utilise relationships with the private sector around the promotion of cultural goods and assets.

Conclusions and next steps

This evidence-based report underscores the need for greater human development through skills capacity building offers in Sub-Saharan Africa.

Despite focusing on different sectors in each country, a cross-cutting analysis of the needs and opportunities of the four focus countries reveals a number of common themes.

The youth demographic is the future and is hungry for success stories to move perceptions of work in the cultural and creative sectors to a more positive light. A focus on creative entrepreneurship for emerging creatives with a focus on monetisation of talent is needed. Additionally, greater graduate preparedness is needed for entry into the cultural sectors. Facilitation of internship and apprenticeship opportunities can play a large role in enabling young people to clearly identify the career paths into their chosen sub-sectors. In some cases, collaboration with institutions of higher education around curriculum enhancement and provision of practical work experience can be truly impactful. Finally, young people can gain much motivation to join the cultural sector if African success stories are better showcased.

Facilitation of intensive mentorship opportunities for mid-career and senior-level professionals in the area of cultural leadership and management has the capacity to increase exposure to regional and international best practices. This exposure will enable professionals to collaborate with international colleagues, facilitate greater opportunities for their cultural institutions, and raise their standards and quality of creative production and cultural management.

Promotion of jobs creation through specialised short-term skills training for young people in technical skills for film, fashion, sound, lighting, cultural production, curatorial skills and arts administration is needed for those wishing to enter the sector. Short courses were identified as the most potentially interesting format for this group. Components of practical work, certification and flexible payment plans should be taken into consideration when developing future programmes in this area. The most important element of a technical skills training programme for young people will be the ability to identify how the skills being taught are directly related to increased income.

Professionalisation of the cultural and creative sectors can be heightened through focused cross-sector skills training for mid-career professionals in business, financial, legal, audience development, events and festivals management, and digital and social media marketing skills. This has been the most strongly highlighted skills gap across the cultural sectors in all four countries.

Innovation in creative hubs establishment and management through a supportive and networked platform across the continent can deliver a high impact for the sector as a whole. Creative hubs are still a growing area in most countries and are facing some structural challenges around business planning and sustainability modelling. Enabling creative hub managers with the right skills can propel this area forward in a successful way. This training could also benefit from an international exchange of knowledge component.

Cultural heritage prospects can be utilised through exposure to international best practices. The potential to showcase the Zimbabwean story through its museums and cultural heritage sector is great. Facilitation of skills training in museum management, business and financial knowledge, and technical capacities is needed. This can be conducted through specialised short-term training

programmes bringing together UK and country expertise, with components of regional and/or international knowledge exchange opportunities.

Data, documentation and research is still needed across the cultural and creative sectors to enable better understanding of the sectors, stronger engagement on public policies, to utilise opportunities with the private sector, and for the promotion of cultural goods, services and assets.

Next steps

The findings from this report will be used to guide the development of new products and programmes. This will be done in close consultation with potential delivery partners, possible co-investors and British Council colleagues across the region. Co-investment and partnership will be crucial to the successful design and implementation of any cultural skills programmes.

Working closely with experts in the UK, current skills training provision will be identified to develop opportunities for potential partnerships and investment.