Invest

in Africa's Creative Industries:

There is a renaissance going on

Kenya Chapter

InsightsOut Africa
BRITISH COUNCIL

Contents

1.0 Introduction

This Chapter gives an overview of the investment landscape for 5 Cultural and Creative Industries (CCI) sectors in Kenya: Film, Music, Fashion, Visual Arts Creative Tech and. The Chapter provides an overview of the contribution of each CCI sector to the Kenyan economy, overview of the key stakeholders and policy frameworks, plus a set of insights the changing investment landscape for the CCIs. It is authored by the HEVA Fund and developed through a round of data collection which included interviews with CCI practitioners, donors, private sector and government officials.

Note: Most references are in Kenyan Shilling (KES). As of June 2024, $USD = 129 KES.

1.1 Strategic context for CCIs in Kenya

Film

Kenya's film sector stands as a vibrant and dynamic force within the East African and African region and has experienced remarkable growth over the last decade, positioning itself as a promising force in the global film landscape. The industry has a growing number of local productions like 'Click Click Bang', 'Volume', 'Disconnect: The Wedding Planner' among many others, and an increasing interest in international collaborations for local and global audiences. Some of the key factors that have contributed to the rise of the Kenyan film industry are;

• Increasing support from the government and other stakeholders - the Government has implemented various programmes and initiatives to promote and develop the sector. This includes the establishment of the Kenya Film Commission (KFC) which provides funding, training and capacity building support to filmmakers.

• Increasing collaborations between local and international filmmakers and production companies have led to an increase in market distribution of Kenyan films to the global stage.

In the last 15 years, Ezekiel Onyango, a local practising film producer, and the chairperson of the Kenya Film and Television Professionals Associations (KFTPA), mentions that the industry has transitioned from a primary service industry model to a more homegrown media consumer model. The industry has been able to work for itself, servicing its own market with entertainment.

Some of the notable contributing factors to this shift included:

- Access to enterprise funding for film through initiatives such as the KFC development fund that has directly invested up to KES 65m.
- Incentives for higher learning institutions to develop curricula for film-related courses by the Kenyan government.
- The creation of the Kenya Film Commission as a support mechanism for the industry
- Zero-rated import costs for film equipment.

Contribution to Kenya's economic growth

The film and broadcasting industry in Kenya has had a significant economic impact, averaging 0.4% of the GDP from 2016 to 2022. The direct, indirect, and induced contributions to the sector highlighted its profound economic influence, with a direct Gross Value Added (GVA) of KES 18.6b and substantial secondary and tertiary economic contributions. According to the Kenya National Bureau of Statistics Film Industry Satellite Account report (2023) the film industry has had substantial growth, with a gross output value of KES 86.9b in 2022 and a GVA of KES 38.1b in the same year. Despite the challenges posed by the COVID-19 pandemic, the film industry created 42,823 jobs in 2022, and earnings stood at KES 14.5b. The report further explains Kenya's film industry orientation as one that operates globally, importing and exporting film-related goods and services. The report highlights that film-related import values increased steadily from KES 48.4b in 2016 to KES 50.0b in 2022, with a notable surge in 2020. There were fluctuating trends in export earnings, with a significant upswing in 2022, driven by film-related equipment and parts. These findings emphasize the influence of external factors, including the COVID-19 pandemic, on foreign trade within Kenya's film sector.

According to the UNESCO 2021 Africa Film Industry report, the Kenyan film sector produces an estimated 500 films every year as stated by the Kenya Film Classification Board, at par with neighbouring Tanzania and ahead of Uganda which makes an estimated 200 films per year.

Role and Distribution of Film Productions and Broadcasting Channels

The film sector sits in a dynamic media landscape that broadcasts and amplifies the reach of Kenyan film industry products, including commercials, films, series, digital content, and others. Kenya is home to vibrant media comprising over 50 free-to-air channels, such as HOPE TV, Citizen TV, Inooro TV, K24, Kenya Broadcasting Corporation, Kenya Television Network, NTV, and Ebru Television. These stations are complemented by mainstream streaming platforms such as Netflix, ShowMax, Viu Sasa, and subscription television offerings such as DSTV, GOTV, and StarTimes. These continue to contribute to the professionalization of filmmaking and the growth of star power among the actors and directors of notable shows.

While most of the major productions or local TV stations are shot in Nairobi, the sector has benefitted from devolution with most counties in the country having dedicated local channels that also provide platforms for local productions. While the scale and resourcing of these productions cannot be compared to their counterparts in Nairobi, they are still creating jobs and contributing to the growth of the sector by ensuring new talent has opportunities to showcase their work.

This concentration of the sector in Nairobi is not only limited to major productions but services and infrastructure linked to filmmaking as well. For instance, data from KFC shows that 147 out of the 161 film agent licenses were issued in Nairobi. Concerning exhibitions, Nairobi also has 11 cinemas compared to 1 each in the major cities of Mombasa and Kisumu respectively. Additionally, most film festivals are concentrated within the Nation's capital with 10 of the 17 festivals held in 2022 being in Nairobi. Mombasa was a distant 2nd with 4 festivals in the same year.

Curriculum

There is a substantial focus that is directed towards capacity building in the film and broadcasting industry in Kenya. Various institutions of higher learning and colleges have led to the emergence of talented filmmakers, innovative storytellers, and a burgeoning pool of creative professionals in the industry by providing an extensive array of courses related to film. Some of the renowned institutions include Kenya Film School, ADMI, Multimedia University, Kenyatta University, USIU-A, Kenya Institute of Mass Communication, and KCA University in Nairobi. Additionally, select institutions in Mombasa (Pwani University) and Eldoret (Moi University) are actively involved in imparting comparable courses.

Financing

Filmmakers in Kenya have traditionally depended on personal funds, loans, or sponsorship agreements to fund their projects. These traditional funding methods frequently present constraints and can pose challenges, particularly for up-and-coming filmmakers. Having recognised that one of the main challenges facing the film industry is the lack of funds, the Government has made available funds and grants that are specifically designed to support the film industry. Ever since the inception of the film empowerment program in 2020, the Kenya Film Commission (KFC) has spent over KES 65m, funding over 60 projects in the broad categories of Development Funding (of feature films, documentaries, and TV concepts); Production Funding (of feature films and documentaries), and Marketing and Distribution Funding. Additionally, the Commission has capacity-building programmes which focus on equipping film professionals with information and skills that enable them to compete in regional and international film environments.

Independent organisations like DocuBox, a Kenyan-based documentary Film Fund, also play a big role in trying to bridge the financial gap by providing various grant programs to independent filmmakers such as the "Follow The Leader" programme, aiming to allocate grants of up to KES 2.1m to film projects. This initiative is designed to empower filmmakers by offering financial support, enabling them to pursue their creative visions.

These recent financing and grant initiatives are showing promising efforts in elevating, promoting, and growing the sector.

Investment Challenges for Film

- Limited Funding Sources: Small and emerging filmmakers are struggling to acquire funding for their projects due to the stringent requirements set by funding/financing entities. Often lacking the resources and experience to navigate these intricate requirements, they find themselves excluded from such opportunities that could propel their projects forward.

- Slow implementation of National film policies: While policies do exist, it remains challenging to implement and enforce them in ways that protect and promote the local industry. To mitigate this, the film industry has developed industry-led policies that can be enforced by sector associations tasked with licensing film practitioners and producers.

Opportunities for Kenyan film development

- International Recognition: Increasing international recognition and interest in Kenyan cinema opens doors for collaboration and co-productions from big productions like Netflix and Showmax.

- Government Support: the Government continues to play a vital role in building infrastructure and creating a supportive ecosystem by creating policies and frameworks that favour creatives in the film industry and productions at large.

Music

Over the past four decades, Kenya's music industry has undergone a remarkable transformation, evolving into one of the most established and competitive sectors in the region. The 2021 World Bank report estimates its worth at KES 320b. According to Statisca, the Kenyan music scene generated USD 9.06m in streaming revenue in 2022, with a projected increase to USD 21.63m by 2024.

The music streaming market in Kenya is witnessing a surge in popularity, driven by local artists embracing digital platforms to showcase their talent. Renowned streaming services such as YouTube, Spotify, Apple Music, and Boomplay have played a pivotal role in exposing Kenyan music to a global audience. This shift has significantly reduced barriers to visibility for the best of Kenyan music. With an annual increase in subscribers to streaming platforms, the industry seems poised for continued growth. Additionally, the music scene has experienced a rise in large scale events such as Blankets and Wine, Nairobi Festival talent shows, and awards ceremonies, contributing to the celebration and recognition of local talent.

Revenues and Distribution

Shows and gigs have been the defining source of day-to-day income for musicians, with digital platforms like YouTube supplementing income. Once the covid-19 pandemic began in 2020, artists were forced to rely primarily on digital platforms. In Kenya, the skiza tunes (ringback tones) have increased revenues significantly for artists over the last ten years. In 2021, Safaricom increased the share of revenue that artists earned from Skiza tunes, allowing them to receive 40% of the sales generated through the platform. This move aimed to fortify the creative industry, fostering talent growth and sustainability in the face of unprecedented challenges.

Many prominent Kenyan artists also derive a significant portion of their income from live performance gigs, for example the notable success of Sauti Sol, who amassed a substantial KSH 7 million in earnings in 2022. Artists also make a revenue through brand dealerships and streaming

•The Music Copyright Society of Kenya (MCSK) has been paying musicians across the country royalties every year based on the number of plays their songs get on radio, TV and in public spaces. Last year, MCSK distributed a total of KES 20m in royalties to its 1600 members. There is still a lot of controversy surrounding the amounts MCSK pays artists. Some argue that the distribution is not always equitable, with certain regions receiving disproportionately higher amounts compared to others. Critics point to a lack of transparency in the royalty calculation process, questioning the fairness in determining the value of each play. Additionally, concerns have been raised about the accuracy of tracking song plays, especially in public spaces, leading to disputes over the actual popularity and reach of certain songs. In response to these controversies, the Music Copyright Society of Kenya has expressed its commitment to addressing the concerns raised by artists. They are working towards enhancing transparency in their royalty distribution methods, investing in better tracking technologies, and improving communication with their members to create a more inclusive and equitable system for compensating artists for their creative contributions. Despite ongoing challenges, the MCSK remains a vital organisation in supporting the livelihoods of musicians and fostering a sustainable music industry in Kenya.

Curriculum and Record Labels

The music education landscape in Kenya is diverse and robust, with numerous higher institutions providing comprehensive training in music and music technology. Kenyatta University in Nairobi, Kabarak University in Nakuru, and Moi University in Eldoret stand as prominent examples, offering a spectrum of academic programs including diplomas, bachelor's, and master's degrees in music. In addition to these established institutions, private schools such as Kamata School of Music and Red Fourth Academy of Music, Dance, and Drama also contribute to the educational ecosystem, providing specialised music education.

Beyond formal education, the Kenyan music scene is further enriched by various initiatives like the emergence of record labels. For example entities like Sol Generation and Kaka Empire, which play a pivotal role in supporting artists throughout the entire music production cycle. These labels not only facilitate the production of music but also actively engage in distribution and marketing efforts, fostering a supportive environment for artists to thrive in the dynamic and evolving music industry landscape.

Additionally, organisations such as Santuri East Africa and Perform Music Incubator have stepped up with innovative learning models for aspiring musicians and DJs in the Country. These programs tend to focus on production, performance, marketing and the legal and business side of the music industry ensuring participants have a wholistic understanding of the music business.

Financing

In the past, many Kenyan artists have faced difficulties securing adequate funding for their projects, including music production, promotion, and distribution. However, recent years have witnessed some commendable initiatives aimed at alleviating these financial constraints and fostering increased opportunities and revenues for musicians. Notably, BoomPlay, Africa's leading music streaming platform, declared its commitment to invest USD1m in supporting the production and distribution of Kenyan music. Stanbic Bank Kenya also announced a partnership with Cellulant to avail loan facilities to music artists secured by their Skiza ringtone royalties.

Although, such collaborations between financial institutions and the music industry contribute to a more sustainable and supportive ecosystem, there is still a long way to go in ensuring widespread financial accessibility and inclusivity. Many emerging and independent artists often face challenges in navigating the financial landscape, and efforts need to be intensified to extend these opportunities beyond established names. Additionally, addressing issues such as transparent revenue-sharing models, reducing bureaucratic hurdles, and expanding financial literacy programs within the music community will be crucial in fostering a more equitable and robust financial infrastructure for all musicians.

Headline Challenges for Kenyan Music

- Digital Piracy - With the rise of the internet, digital piracy has become a pervasive challenge in the music industry. Peer-to-peer sharing, torrenting, and unauthorised streaming platforms make it easy for users to access music without compensating the creators which affects the revenue streams for artists.

- Lack of transparency in the collection and distribution of music royalties.

Headline Opportunities for Kenyan Music

- Brand partnerships particularly with the entry of Spotify in the country. As artists gain visibility and build a strong presence on Spotify, they can become attractive partners for brands seeking to connect with their target audience through music. Such collaborations can involve sponsored more playlists, exclusive re leases, and promotional campaigns that integrate the artist's brand with that of the sponsoring company. The entry of Spotify into the Kenyan market signifies an increased potential for artists to leverage their online presence and engage in mutually beneficial partnerships with brands. This not only supports artists financially but also enhances their visibility and influence within the industry.

In summary, Kenya's music industry stands at the forefront of regional competition, driven by the increasing popularity of streaming platforms and the global exposure they provide. While challenges like IP protection persist, the industry is presented with promising opportunities in digital distribution, creative collaborations, and brand partnerships, suggesting a positive trajectory for the future.

Fashion

Kenya's fashion industry not only consists of the textile sector but also includes the design, production, marketing, and consumption of clothing and accessories. In the 1980s, the textile sector initially thrived but faced a setback with the introduction of second-hand clothing importation, thrift flood-in mostly from the Global North, which sold cheaply, took over. Estimated at a potential worth of KES 35b (in 2021), the Kenyan fashion industry still struggles to grow to its full potential with low consumption of local textile products. Second-hand clothing, locally known as Mitumba, continues to dominate the market, posing a significant challenge to the development and sustainability of the domestic textile and apparel sector. With the rise of digital technology, it has, however, seen a massive growth spurt in the fashion e-commerce segment, which is predicted to reach USD 153.7m by 2024. Digital platforms such as Shop Zetu and Powered by People continue to push the bounds of market access for fashion designers and accessory makers both locally and globally. In some cases, the platforms go the extra mile of supporting the vendors with capacity building learning material, access to working capital and product photography and placement.

Second Hand Clothing 'Mitumba'

The second-hand clothing locally known as 'Mitumba' business has grown to be a multi-billion-shilling enterprise employing an estimated 2 million individuals across the country who operate especially from major markets and shopping hubs such as Gikomba, Eastleigh, Muthurwa, and Toi in Nairobi County, Nasha Market in Nakuru County and Kongowea Market in Mombasa County. Kenya is among the largest importers of second-hand clothes in the Sub-Saharan region due to the high demand for clothes and footwear in the country. According to the latest data by the Kenya National Bureau of Statistics, Kenya imported 53,979 tonnes of second-hand clothing in the second quarter of 2023. This is an increase of 30.6% compared to 41,314 tonnes in a similar quarter in 2022. The consumer demand for second-hand clothes in Kenya arises from its affordability, good quality, and trendy perception as compared to new clothes which are perceived as expensive but not offering equivalent value in terms of quality.

Kenya's Cotton and Textile Industry

After its decline in the 1980s, the textile industry, however, got a reprieve after an international trade agreement; The African Growth Opportunity Act (AGOA) which was introduced in 2000 provided African countries including Kenya with duty-free access to the US market. According to the 2015 report by the Ministry of Industrialisation and Enterprise Development on the country's apparel and t extile industry, Kenya saw a return on investment and growth spurred by assurances of AGOA renewal. According to the Kenya Institute for Public Policy Research and Analysis (Kippra), 70% of Kenyan apparel companies sell about 80% of their products to US markets while Nairobi's export processing zones (EPZs) host about 21 apparel companies that manufacture garments primarily for export under AGOA.

The industry is structured into three categories, comprising 21 significant entities within the Export Processing Zone (EPZ), 170 mid to large-scale companies outside the EPZ, and over 70,000 micro and small businesses, with the majority of practitioners, including young women and men, operating in the micro and small business sector. Data on this sector, often operating semi-formally, is challenging to obtain and is likely influenced by Kenya's industrial apparel production.

Fashion eCommerce

The Kenyan Fashion e-commerce market accounts for 19.2% of the total e-commerce market in Kenya and is expected to increase over the next few years. After the COVID-19 pandemic, the consumer demand for e-commerce increased significantly; the convenience, accessibility, and diverse product offerings in the online fashion sector contribute to its expanding share within the broader e-commerce landscape in Kenya.

The growth of fashion e-commerce is highlighted by the number and size of new players in the market for example Shop Zetu, a multi-brand, multi-vendor online fashion marketplace for affordable fashion, footwear, beauty, and accessory brands that was started in 2020 and now serves over 200 fashion brands and over 30,000 customers.

Financing

Over the past decade, the fashion industry has received new support in the form of financing and funding from venture capitalists and private investors. This influx of capital has significantly reshaped the landscape of the fashion business, fuelling innovation, technological advancements, and market expansions. Shop Zetu for example received KES 140.8m in seed funding from Chui Ventures, Launch Africa, Roselake Ventures, and Logos Ventures to scale customer acquisition, expand the vendor base, and explore partnerships with international fashion brands seeking local distribution.

Certain fashion brands have successfully leveraged the capacity-building aspect of the financing, accessing resources that aid in the development of their organisational structures, rendering them financially prepared. A notable example is Vivo Fashion, which recently participated in the Ibuka programme—an incubation and acceleration initiative by the Nairobi Securities Exchange. This is designed to assist and prepare companies for engaging in equity or debt capital markets transactions in Kenya.

Despite the considerable influx of funding into the fashion industry over the past decade, it is essential to acknowledge that not all players in this dynamic field have enjoyed equal benefits. While established brands like Shop Zetu and Vivo Fashion have made strides through substantial financing, the reality is that numerous small and upcoming fashion brands continue to grapple with significant challenges that limit them to small-scale production given the resources required to purchase fabric in large amounts. Access to adequate capital would allow them to make clothes in bulk and keep local designs afloat.

Curriculum

The fashion sector benefits from capacity-building efforts from various universities around the country. While the majority of these schools are found in Nairobi, fashion programmes are also offered in Mombasa (Kenya Coast National Polytechnic) and Eldoret (Confucius Institute at Moi University). Residents in Nairobi can access fashion and design programmes from University of Nairobi, Msecal School of Fashion Design, and Kenyatta University.

Headline Challenges in the Kenyan Fashion Industry

- Access to sustainable financing: Raising capital emerges as a daunting hurdle for fashion brands and designers. The absence of guaranteed access to sustainable financing compounds the financial strain on businesses. Clothing brands with promise and well-structured plans find themselves constrained to small-scale production due to insufficient funds for bulk fabric purchases.

- Lack of policy coherence and institutional alignment: this challenge encompasses the absence of comprehensive policies, regulations, and guidelines that should ideally govern diverse facets of the fashion sector. Moreover, the industry grapples with the lack of dedicated regulatory bodies capable of establishing frameworks essential for ensuring the sustainable growth of fashion enterprises. The absence of a unified and well-coordinated approach contributes to a regulatory vacuum, hindering the establishment of consistent standards and impeding the industry's progress towards achieving sustainability and responsible growth.

- High Production costs and systemic inefficiencies that do not favour local textile production: Local manufacturers often face difficulties in maintaining cost-effective operations, leading to a reliance on textiles imported from abroad. This heavy dependence on international sources is a direct result of the prohibitive expenses associated with local production, which includes factors like raw materials, labour, and operational processes.

Opportunities

- E-commerce and Technology Integration: The increasing penetration of the internet and mobile technology in Kenya offers opportunities for fashion businesses to expand their reach through e-commerce platforms. Online retail, digital marketing, and virtual fashion events can provide new avenues for growth.

- In the last few years, there has been a notable surge in the promotion and market growth of 'Made in Kenya' products within the fashion industry. This initiative aims to foster the entire lifecycle of fashion products, from production to distribution, marketing, and ultimately consumption, with a primary goal of encouraging the creation and appreciation of fashion items crafted in Kenya. This movement signifies a collective effort to elevate and celebrate the country's local craftsmanship and design, providing both economic opportunities for local businesses and an avenue for consumers to embrace and support Kenyan-made fashion products.

Visual Arts

In Kenya, Visual arts is practised in many different forms such as photography, textile arts, sculpting, ceramics, and contemporary arts. Within this vibrant artistic landscape, numerous globally recognised and critically acclaimed Kenyan artists have made significant contributions. One such luminary is Wangechi Mutu, celebrated for her transformative work that reshapes narratives surrounding womanhood while challenging the racist and misogynistic tenets prevalent in Western culture.

Wangechi Mutu's impact extends far beyond Kenya, reaching global acclaim. Notably, she was a participant in the prestigious 2019 Whitney Biennial, a testament to the international recognition of her artistry. Furthermore, Mutu holds the distinction of creating the inaugural commission for the Metropolitan Museum of Art's iconic Fifth Avenue façade, solidifying her place in the annals of art history.

The influence of Wangechi Mutu's work is evident in its inclusion in the esteemed collections of institutions such as the Metropolitan Museum of Art, the Museum of Modern Art, the Institute of Contemporary Art in Boston, the Museum of Contemporary Art in Los Angeles, the Studio Museum in Harlem, and the renowned Saatchi Gallery. Her art not only transcends geographical boundaries but also challenges and enriches the global conversation on culture and identity. Wangechi Mutu stands as a beacon, exemplifying the power of Kenyan visual arts to provoke thought, inspire change, and contribute to the universal dialogue of artistic expression.

Other artists of note include Michael Soi, whose art offers a satirical look at politics, Sino-Africa relations, health and lifestyle issues, and many other Kenyan topics; Miriam Syowia Kyambi, an interdisciplinary artist and curator who works across photography, video, drawing, sound, sculpture and performance installation and Margaret A.N Odundo, a ceramic artist whose objects are produced through the tradition work of pottery.

Exhibition and Revenues

Kenya has events targeted at offering visual artists and consumers of the medium opportunities to interact with each other. While such events offer opportunities for artists to display their work, it is also an avenue for revenues through sales of artworks. For instance, NAICCON has provided platforms for Kenyan visual artists and illustrators opportunities to showcase their works and interact with audiences since 2014. They organise and host the Nairobi Comic Convention (NCC), Mombasa Comic Convention (MobCon), and Kids Convention (KidsCon). Galleries and art spaces in Kenya also continue to offer showcasing opportunities for artists. Some key players in this regard include Circle Art Gallery (Nairobi), Nairobi Contemporary Art Institute, and The Lamu Factory (Lamu).

There is very little data on the revenues associated with the sector. However, there are sources which highlight the economic potential of the sector to generate substantial revenues for artists and the wider cultural ecosystem. For instance, data from the 10th-anniversary edition of Circle Art's Art Auction East Africa (2022) shows cumulative sales of East African art worth up to KES 30.5m with Kenyan artists such as Beatrice Wanjiku's 'Yellow Memory', and Peterson Kamwathi's 'Kadhi Court' selling for USD 16,198, USD 13,001 respectively. The 2023 Modern and Contemporary Art Auction 2023 by Circle Art saw Kenyan art such as Yony Waite's Migrants End, Ancent Soi's Feeding Flamingo, Rosemary Karuga's Mother and Child selling for USD 10,096, USD 5,518, and USD 9,509 respectively. A look at the artists on sale in both auctions demonstrates regional balance with artists from neighbouring countries such as Tanzania and Uganda featuring prominently in the auction, highlighting Kenya's position in the region as a hub for Visual Arts production and sales. However, these auctions are primarily located in the Country's capital city.

Curriculum and Capacity Building

The visual arts sector in Kenya benefits from capacity-building efforts from the country's leading universities. While the majority of these schools are located in Nairobi, art programmes are also being offered in Nyanza County (BA Fine Arts and BA in Design offered by Maseno University) and the Coastal region of Mombasa and its environs (BA and Diploma in Art and Design offered by Pwani University).

Residents of Nairobi and its surrounding areas can take advantage of programmes being offered by the University of Nairobi, Kenyatta University, and specialised institutions such as the Buru Buru Institute of Fine Arts and ADMI. For more established artists, opportunities exist for residencies for them to improve their craft, some examples include the Untethered Magic, Kamene Residency (Nairobi and its environs) Tilliard Projects, Anidan Residency (Lamu), Tafaria Art Residency Program (Nyandarua County), and The Orkediart residency program (Nanyuki) to name a few. These programs provide space and resources for artists to further deepen and improve their skills.

Grants and Financing for visual arts

The visual arts sector in Kenya benefits from multiple revenue sources depending on the medium at hand. Some of the main revenue streams for practitioners come from areas such as advertising and branding, event and wedding photography, and the sale of original works (comic books, paintings, sculptures, pictures, animation, etc).
Other available avenues for visual artists are grant funding programmes such as The African Arts Trust Fund which has provided resources to allow arts organisations in the country to run residencies and art programs as well as rent office and exhibition space. Similar Funds include the Triangle Network whose funds played a crucial role in inaugurating Nairobi Contemporary Arts Institute (NCAI) in January 2022 and currently contribute to its artistic initiatives, encompassing artists' residencies, exhibitions, and outreach activities. The Braid Fund, which is a collaboration between the Trust for Indigenous Culture and Health (TICAH) and the Cultural Heritage for Inclusive Growth (#CultureGrows) programme by the British Council, extends grants to pioneering practitioners involved in art and culture projects in East Africa. Their s upport so far has been towards the completion of art projects as well as support for collaborative interdisciplinary artistic projects.

Headline Challenges for Visual Arts in Kenya

- Lack of data on the revenues of visual artists. While galleries such as Circle Art often publicise the amounts made from art auctions, this is not a common practise with other galleries in the country. This then makes it difficult to estimate the revenues brought in by the Visual Arts Sector.

- AI and wider digital transformation - While AI can enhance the work of visual artists, it can also lead to a loss of job opportunities for Visual Artists. Corporates in the country have been moving towards a trend of using AI generated images for their marketing campaigns, which means replacing artistic services.

- Concentration of infrastructure and programming for Visual Art, in Nairobi, with a far weaker enabling environment beyond the capital city.

- Limited local funding for the sector – especially outside Nairobi.

Headline Opportunities for Visual Arts in Kenya

- Development of comprehensive databases for the arts sector to allow audiences and potential investors to better understand the landscape, support registration and enable the introduction of measures which protect foster the status of the artist – e.g. for socio-economic sustainability.

- Public sector involvement through availing available infrastructure (e.g. county museums) for exhibition, training, networking and market development.

Creative Tech

Creative Technology is the technology that facilitates the production, consumption, distribution, and production of Creative and Cultural goods and services. The creative tech industry is also closely linked to the Information Technology (IT) and Communications industry due to a reliance on shared infrastructure and in some cases personnel. We can broadly categorise the creative tech sector in Kenya in the following ways:

- Technology that provides market access solutions for creative goods and services. This includes:

Distribution platforms

Kenya has seen a rise in the number of subscriptions to broadcasting services. This is evidenced by data from Communications Authority showing a 0.2% growth to 6.205m users in Q1 of 2023 from 6.191m users reported during the preceding quarter, demonstrating the country's growing appetite for on-demand content. It is however challenging to find data on the total no. of users of Kenyan content on demand platforms such as Viusasa and Mdundo which provide video and music streaming services respectively. This is not always the case for international platforms in the Kenyan market. While there is no available data on the number of subscribers to the music platform Spotify, the data available shows that the top cities where Kenyans streamed from on the app are Nairobi, Mombasa, Nakuru, Eldoret, and Kisumu. In 2021, there were 1.2 million user-generated playlists on the platform further showcasing the country's affinity to music streaming platforms.

E-commerce Platforms

In Kenya, mobile money payment solutions have had a transformational effect on consumption for the CCIs. E-commerce platforms have allowed consumers to easily access creative goods and services. Platforms include Hustlesasa, which provides digital storefront solutions for creative practitioners to allow them to sell directly to consumers. Ticketing platforms such as Mookh, which offers online ticketing solutions for events and shows in Kenya, have become easier to use as a result of mobile money and card payment solutions growing in popularity and ease of use.

- Technology that provides entertainment, edutainment, and storytelling solutions

Extended Reality Solutions

Extended reality (XR) is defined as an umbrella term for any technology that alters reality by adding digital elements to the physical or real-world environment to any extent. Extended reality has a variety of use cases in non-CCI sectors. The medium lends itself to creating immersive experiences and visualisations of products and services, as well as virtual tours of buildings and locations. It offers opportunities to deepen learning for students and marketing solutions for companies looking for more interactive ways of advertising their products and services. Sectors that benefit from this technology include real estate developers and Edutainment where VR and AR are used to create immersive learning experiences. Some major players in the VR and AR space in Kenya include Ukweza VR, a social enterprise based in Kenya that focuses on creating educational Virtual Reality (VR) and 360-degree video content to complement classroom learning and offer additional learning on social and environmental issues e.g. conservation. They work with schools & educators to create and deliver the content to ensure it meets learning standards and serves the community.

Video Game Development

Edutainment has gained popularity in Kenya over the years with companies such as Usiku games providing gaming content with an educational angle to the Kenyan Market. Some areas that have benefitted from gamification of crucial themes in society are education, financial literacy, and civic education. Kenya is now ranked as the ninth most popular gaming hub in Africa. According to The 2022 PWC Africa Media and Entertainment report, the country's video games market generated an estimated Ksh15 billion in revenues and boasts a valuation surpassing KES16.8b (USD137m) with a noteworthy compound annual growth rate of 8.7 percent.

There is limited data on the size and revenues of the creative tech industry as a whole. This subsequently makes it difficult to ascertain the actual size and economic contribution of creative tech industries in Kenya. However, the sector's growth potential is present due to advancements in internet connectivity and digital payment solutions in the Kenyan Market. Over the last decade, there has been a noteworthy surge in the adoption of both fixed and wireless broadband subscriptions, coupled with the extensive expansion of Fibre to the Home (FTTH).

According to the KFC report, the proliferation of FTTH connections has grown from a modest 23 in 2010 to a staggering 566,901 in 2022, which has ushered in an era characterised by increased and reliable data speeds in the country. Additionally, the documented statistics reveal a substantial rise in fixed and wireless broadband subscriptions in Kenya, increasing from 173,354 in 2010 to an impressive 32,918,239 by 2022.

Concerning e-commerce, 2021 data from VISA shows that Kenya was among the top market contributors for e-commerce in Sub-Saharan Africa (SSA) over three years alongside South Africa and Nigeria. The report highlighted the notable key enablers for e-commerce in the country as the ability to access financial services, digital payments, and digital infrastructure.

Other factors that can contribute to the growth of the sector are the penetration of mobile phone devices, mobile internet, and mobile payment services. 2023 data from the Communications Authority of Kenya (CAK) highlights feature phone and smartphone penetration at 66.2% and 58.3% respectively. Mobile money subscriptions stood at 38.4m users while mobile internet subscriptions were at 47.96m, with 67.1% of this being mobile broadband. The same data highlights that subscriptions to broadcasting services grew by 0.2% to 6.205m subscribers from 6.191m reported during the preceding quarter, showing the country's growing appetite for on-demand content.

Role and distribution of tech hubs in Creative Tech

Entrepreneurs in Kenya have access to a number of capacity building and human resource solutions from the various tech hubs that exist in the country. These hubs, mostly located in Nairobi however Kisumu and Mombasa, also provide spaces that entrepreneurs can access. The challenge faced by these spaces is that they often lack a dedicated CCI focus and instead work to provide the tech expertise and business skills training required by tech entrepreneurs in a manner that is often sector agnostic. For instance, in the case of iHub, a well-known techprenuership catalytic space in Kenya, some of the services and programmes provided that can be of benefit to techpreneurs irrespective of the sector of focus include:

- Capacity building programmes to allow entrepreneurs to own and operate sustain-ablebusinesses working in the tech sector.
- Research solutions to facilitate collaboration between different actors in the tech and innovation sector, to provide evidence-based, credible contributions to relevant national and global policy discourses. E.g. Acceleration programmes that bridge the gap between Government and citizens e.g. GovLab
- Special programming for marginalised and/or underrepresented groups in the tech-prenuership space e.g. The Women in Business incubator series.
- Affordable co-working spaces which provide opportunities for networking with like-minded techprenuers and service providers such as designers, developers, and programmers.

Similar spaces exist in different parts of the country such as LakeHub, an innovative non-profit organisation dedicated to bridging the skills gap and creating a brighter future for Africa's youth through innovative learning and development programmes. and Sotehub, a digital hub that trains youth and MSMEs from rural Kenya; the urban poor are often marginalised with fewer opportunities for career progression or business growth and successful launch or scale into markets. Some of the solutions these hubs provide include:

- Digital Marketing: teaching MSMEs how to leverage digital channels to reach a wider audience and grow their customer base. This includes training in social media marketing, search engine optimization, and email marketing.
- Website Fundamentals: teaching MSMEs how to create business websites and mobile apps using the No Code platform
- Customer Relationship Management: We provide training on how to use digital tools to manage customer relationships, including how to track customer interactions, respond to inquiries, and resolve issues.

Curriculum

While the country's major public universities all offer computer science and IT related courses that continue to provide a pipeline for the tech ecosystem, there are institutions that offer specialised sector relevant training as well as others that have more of a CCI focus. Institutions such as ADMI in Nairobi have certificate and diploma courses with a creative tech focus and Moringa School has learning programmes for Software Development, Data Science, Product Design, and Cyber Security and has so far managed to train over 7000 individuals since their inception in 2014.

Financing

The financing Space for creative tech is largely dependent on private investment such as venture capital firms as well as the donor space. While conclusive figures on the amounts raised by creative tech initiatives are not available, there is data that shows a huge investment by VC firms in the e-commerce and retail tech space in the country. According to The African Tech Startups Funding Report 2022 report, E-commerce and retail tech start-ups received US$239,996,000 in funding, which represents 41.8 per cent of Kenya's total received funding for tech start-ups. Projects such as the Ignite Culture Fund, a grants programme Implemented by HEVA in partnership with the British Council Kenya, with the financial contribution of the European Union, and further support from the Organisation of African, Caribbean and Pacific Group of States (OACPS) channelled funding to 6 organisations from East Africa with a creative-tech focus. The grant support went towards research and development, market access strategies, equipment and technology acquisitions. Some of the projects supported included e-commerce ventures, edutainment ventures, extended reality ventures and content distribution ventures such as VOD platforms. Other notable donor interventions in the space include the Kenya Young Game Developers and Animators Incubator Programme. This is a collaborative programme supported by the Creation Africa project, an initiative of the French Government to support the CCIs in Africa. The programme offers capacity building and funding support to game developers in the country and is being implemented locally by The Nairobi Game Development Center (GDC) which is a community co-working space for game developers in Nairobi.

Headline Challenges for Createch development in Kenya

- Limited Research and Development (R&D) Funding: Insufficient investment in research and development is impeding the industry's ability to stay at the forefront of technological advancements and innovation.

- Intellectual Property Concerns: Issues related to intellectual property protection pose challenges. Ensuring that creative tech innovations are adequately safeguarded is crucial for the industry's growth.

- Skills Gap: There is a shortage of skilled professionals with expertise in both technology and creative fields. There is a need to bridge the skills gap.

- Access to Funding: Creative tech projects find it challenging to secure funding for their projects, especially where the technology is not proprietary. There is limited access to venture capital, angel investors, and other funding sources which impedes the development of innovative initiatives.

- Regulatory Environment: There is a lack of regulatory frameworks and policies, specifically tailored to the creative tech industry as technology continues to advance.

Headline Opportunities for Createch development in Kenya

- Cultural Preservation through Technology: Creative tech can play a role in preserving and promoting Kenya's rich cultural heritage through digital initiatives, such as virtual museums, interactive exhibits, and storytelling platforms.

- Virtual and Augmented Reality (VR/AR): Leveraging VR and AR technologies for applications in education, entertainment, advertisement, tourism, and other sectors presents exciting opportunities for creative tech professionals.

- E-Learning and EdTech: The education technology sector presents opportunities for developing innovative solutions to enhance digital learning experiences. This includes educational apps, online courses, and interactive learning platforms.

In conclusion, the landscape of Creative Tech in Kenya is characterised by both promise and challenges. While the sector is still growing, pioneering organisations like Black Rhino VR are leading the way in empowering youth and shaping the future of creative technology. As the Creative Tech sector continues to navigate the evolving landscape, a collaborative approach involving stakeholders, policymakers, and the creative community is essential. By addressing challenges and capitalising on opportunities, Kenya's Creative Tech industry can contribute significantly to the nation's cultural preservation, education, and economic development, ushering in a new era of innovation and creativity.

1.2. Strategic Conext and SWOT for the Kenyan CCIs

According to the Baraza Media Creative Sector Study, although the CCIs face a lot of challenges, there is plenty of room for growth, innovation and progress. The study goes on to mention one of the biggest opportunities that will allow for growth is the rising popularity and impact of digital technology. It highlights that not only can it be an enabler to providing access to markets and opportunities, but it can also enable the creation of self-employment opportunities for creators in the digital space as well as the new distribution and revenue streams. Another finding from the Baraza Media Creative Sector study was that the majority of respondents demonstrate a solid understanding of Intellectual Property (IP) and its operational mechanisms within their respective fields. However, when it comes to gauging the perceived benefits of IP, a notable degree of uncertainty is prevalent among creatives. Consultees to this research advocate for initiatives such as workshops and training sessions to enhance awareness and comprehension of IP-related matters.

According to the Creative Economy Scoping Report | British Council there is a growing CCI market with an increasingly youthful population, an expanding middle class, and a growing hunger for value-adding and personalised goods and services. A culture of innovation and convergence fosters collaboration across disciplines, industries, and technologies. As well as a heritage steeped in cultural richness, marked by a legacy of creativity, invention, and a history of trade in aesthetics.

The Creative Economy Scoping Report | British Council goes on to highlight the weaknesses as creative education and low levels of entrepreneurialism, management, and leadership across the arts and cultural sector; plus low levels of literacy across the wider population weaken the growth of the industry. As well as the three barriers of corruption, bureaucracy, and censorship. Plus huge infrastructural challenges. The report also adds inconsistent approaches to copyright – from weak rights collecting mechanisms to draconian enforcement, with few examples of a mature and coherent approach to rights management.

In 2022, Netflix published their Socio-economic Impact Report, looking into their investments in the film sector on the continent, breaking down the impact of their investments in 3 focus countries, Kenya, Nigeria and South Africa. Netflix have recently entered an MOU with the Kenyan government and were able to highlight their direct investment into one commissioned tv series, a full scholarship grant for 46 students undertaking film-related courses, and capacity building and collaborative initiatives with the local public sector on a policy-level. In the report, Netflix share their commitment to investing in the country's film sector through their work in policy in collaboration with the government, through pipeline development through upskilling programmes, and through direct investments in original productions or licenced film and tv titles. The collaboration with the Kenyan Government shows a willingness by the public sector to collaborate with private investors to develop the local CCIs through direct investments and programming through public-private partnership models. The MOU that exists between Netflix and the Government of Kenya is only made possible through the increasing acknowledgement of the economic and social significance of CCIs. In the report, Netflix demonstrate their efforts to create a pipeline in the industry through higher education equity scholarship funds, on-the-job training experience, and incubators for film-makers such as the African Folktales Reimagined which come with a production grant, continue to highlight the continent and Kenya as a priority investment area for Netflix, due to its young and talented demographic of creative practitioners.

According to PWC's Africa Entertainment & Media (E&M) outlook report, E&M revenue in Kenya grew strongly in 2021 as the market, like the rest of the world, recovered from the effects of the COVID-19 pandemic. From an advertising perspective, the Internet advertising segment is predicted to see the largest gains in revenue terms across a five-year forecast period to 2026. In Kenya, rapid gains in Internet advertising will mean that, by 2026, this segment will be just USD 1.2m behind traditional TV and home video, paving the way for Internet advertising to overtake this segment in later years. This is made possible across all media and creative products consumed via the internet in the country due to the increased internet penetration from the continued development of a digital superhighway, and given Kenya's status as a leader in digital platform adoption. Gaming continues to be an emerging sector with high potential for the continent. 22% of Kenya's young, tech-savvy populations are the driving force behind the video games sector, with gamers across the continent preferring to play via mobile devices, which can be attributed to the increased smartphone penetration in the country.

According to FSD's New Business Models for Financing the Creative Sector Research report, they state that entrepreneurs within the creative sector typically lack business and entrepreneurial skills, which reinforces the tendency towards informality. Their survey results point towards only 12% of the respondents having registered business. A combination of secondary sources estimates that there are 275,375 creative enterprises in Kenya. Of these, 44,614 are registered, translating to a formalisation rate of approximately 16%.

Access to Finance Challenges

The FSD survey results further indicate that a lack of access to finance is the biggest challenge faced by creative enterprises, followed by lack of access to market and low levels of support from the government. Many creative enterprises rely on digital loans from MPESA loan services as well as digital lending applications given the ease of accessing and qualifying for these loans despite their high interest rates. The survey results indicate that 55% of creative enterprises require between KES 100,000 and KES 1m an amount generally exceeding the maximum allowable loan amount by most digital lending services. It is worth noting that none of the survey respondents reported using a credit product, despite 64% of respondents having a personal/ business bank account for their enterprise. Many respondents open bank accounts primarily to secure contracts with corporate clients and not as a means of securing financing from banks.

Many financiers, especially commercial banks, still rely on traditional collateral assets such as land and vehicles to secure commercial financing models, however, these are hard to come by. Creative business and practitioners are willing to use alternative collateral assets such as cameras, laptops and software, though critical to their trade, however, these are not valued or understood by financiers. As a result, financiers have not attempted to tailor asset financing products for these specific assets, or would not accept them as collateral for additional loans.

According to the FSD report, despite the increased recognition of the creative industries by the government, only 3% of respondents within the survey reported benefiting from government initiatives. In addition to financial solutions tailored to their needs, creative practitioners have an even greater need for the government to address the market development and institutional constraints that impede growth of the market. Other interventions required include training and skills development, industry development initiatives and grants, improvement in copyright and royalty management.

2.2. Headline Development Activities and Programmes for CCI investment in Kenya

A. Public funding

Consultees for this report set out the following as activities and programmes which can be built upon and connected to form a more coordinated and comprehensive approach to CCI investment in Kenya:

Public Funding Programmes

At a ministry level, there is a need for the Kenyan Government to increase the budget allocated to the creative and cultural arms of the government such as the Ministry of Sports, Culture and Heritage (MOSCA). Under the current constitution, management of culture has been devolved to counties, with MOSCA having a mandate over national initiatives. As of 2020, the culture department received approximately 5% of the Sports, Art and Social Fund. Currently, the 2020/21 budget provides KES 15b to this fund, translating to approximately KES 750m for the culture department (translating to 0.01% of Kenya's 2019 GDP).

The Kenyan public sector has, however, taken some strides to empower the nation's largest workforce, the youth, to access opportunities in the Creative and Cultural Industries, through capacity building and access to finance initiatives. The Ministry of Youth Affairs, the Arts, and Sports launched the Talanta Hela project, a flagship plan to monetize talents in sports and the CCIs as one of the quick-win sectors for the administration. The project is in line with the Kenyan Government's bottom-up economic transformation agenda and aims to identify, recruit, nurture, market, and monetise talent.

Through the Youth Enterprise Fund, the Talanta Loan is a source of finance made available to youth in the CCIs as a part of the Kenyan government's youth affirmative action. The fund is open to individuals, registered groups, partnerships, or companies owned and run by Kenyan youth.

Applicants may use the Loan of up to KES 2m for working capital or to purchase talent-related equipment without interest; the loan, however, does attract a 5% management fee to be deducted upon disbursement. Loan amounts of up to KES 300,000 are secured using chattels and assets to be purchased. Loans above KES 300,000 are fully secured using conventional securities. Youth must have 2 guarantors, one of whom must be in the industry.

B. National, County and Ward-level Development Funds

Kenya's Trans-Nzoia County is rich in its cultural history, heritage, and creative expression and products, as such, the Trans-Nzoia county government aim to position the county as a cultural tourist destination, building on the successes of cultural events such as the Kitale Film Week that draw in both local and international tourists. To support this initiative, the county government has established a development fund to provide financing to creative practitioners operating in groups, such as those in acting associations, to support local film production projects. The fund, known as the Nawiri Fund, aims to finance 10 groups per ward, with a total of KES 100m to be set aside for the initiative at a 7% interest fee; however, with the annual budget set aside by the county for creative and cultural industries development capped at KES 5m, there is a need to supplement the finances received from the National government through strategic partnerships.

Beyond financial support, the county government of Trans-Nzoia is committed to developing the capacity of creative practitioners with both technical and business skills through partnerships with organisations such as Equity Bank, who will equip creative practitioners with knowledge on financial management, and with the Kenya Film Commission to develop a pipeline for actors to access initiatives and opportunities on a national level.

C. International Cultural Institutes

- The British Council in Kenya offers various grant programmes specifically tailored for the CCIs. The grant programmes are designed to support initiatives that promote cultural exchange, collaboration, innovation, and capacity-building within the arts sector. Examples of the programmes that have been run by the British Council in Kenya within the wider British Council global network include:

- Culture Seeds: This programme supports small-scale creative projects which bring people together and inspire local communities. Projects could range from arts and cultural events to workshops and exhibitions. In recent times, through the Cultural Heritage for Inclusive Growth (CH4IG) programme, the British Council has partnered with HEVA Fund to identify, support, and stimulate culture and heritage startups through seed grant-loan hybrid investments. The fund was structured to give out seed investments of between KES 500,000 to KES 3m, repayable within 24 months.

- Art Connects Us: This programme supports collaborative projects between artists and arts organisations in sub-Saharan Africa and the UK. It provides grants to support projects that promote artistic exchange, collaboration, and innovation.

- Grants for Research Collaborations: The British Council offers grants to support collaborative research projects between researchers, artists, and cultural organisations in Kenya and the UK. These grants aim to foster knowledge exchange and innovation in the CCIs. An example of such collaborations is the research project by UK AID, the British Council and HEVA on the Creative Industries Ease of Doing Business reports on Music, Film, Fashion and Gaming published in 2018.

- UK-Kenya Season 2025 Scoping Grant: Looking forward, the British Council in Kenya has open applications for scoping grants as part of the 2025 UK/Kenya season of culture. The grant scheme aims to support new connections, exchanges, and future collaborations between the UK and Kenya that lay the foundation for long-term relationships among artists, creative practitioners, art and cultural organisations, hubs, networks, and collectives digitally and/or face-to-face. The projects are required to be delivered by at least one UK-based organisation/ individual and at least one organisation/ individual based in Kenya with a maximum available grant of GBP 5,000 per applicant, and with travel opportunities scheduled to take place between late April and October 2024.

- The Goethe Institut has been a key player in the development of skills and capacities of business in the Kenyan CCIs. In collaboration with their JENGA CCI project, HEVA Fund designed a facility focused on young women in creative enterprises named Young Women in Creative Industries Fund, which looked to increase their production capacities, launch new product lines, invest in new technology and expand distribution networks in the East African market.

With investment ticket sizes of up to KES 1m in loans and technical assistance, and a repayment period of 15 to 18 months, the fund successfully invested in 5 early-stage businesses. Whereas, Goethe Institut may not often give direct financing opportunities to creative enterprises, they have indirectly invested in creative intermediary businesses by empowering them to design and implement technical and business programs for creative practitioners. This includes showcasing opportunities, paths to market opportunities as well as providing stipends to support capacity building programmes. Through these efforts, Goethe Institut has greatly contributed to the cultivation of a creative and cultural space at the basement of The Mall, located in Westlands, in the heart of the Nairobi. Examples of such partnerships include:

- FemBase - Designed to increase income opportunities for female creatives.
- State of the Arts (SOTA) in collaboration with BlackRhino VR - Uses immersive tech to upskill creative artists.
- perFORM Music Incubator lab - Is a 12-week live performance and music business incubation programme
- VR/360° Filmmaking for Women in collaboration with DADA Trust and BlackRhinoVR
- Santuri Electronic Music Academy - Supported to develop curricula on different electronic music artforms.
- ADMI Digital Media Incubator - Goethe Institut supported this GIZ-funded project by providing stipends to the participants
- DigiIntermediaries Bootcamp in partnership with Fak'ugesi African Digital Innovation Festival - Goethe Institut supported this GIZ-funded project in South Africa by providing stipends to the participants
- Creative Industries Business Skills Training in partnership with GIZ and HEVA Fund - Goethe Institut supported this GIZ-funded project by providing stipends to the participants

• Alliance Francaise Kenya and the Nairobi Game Development Centre have teamed up to launch the Kenya Young Game Development & Animation Incubator Programme for 2024. This is a transformative initiative supported by the Creation Africa project, an initiative of the French Government to support the CCIs in Africa. There is KES 1m (USD 6500) in funding for each project, over six months. Projects will also receive free workspace at the Nairobi Game Development Center as well as mentorship sessions, new hardware and a showcase event where participants will be able to pitch their projects to investors in the industry in July 2024.

HEVA Fund has partnered with the Alliance Française Nairobi to develop the "Hii Stage" program for 2024 that supports Kenyan artists with quality original projects in the areas of music, performing arts, and cinema to take their productions on tour across the network of Creative Arts Spaces in Kenya (CASiK) comprising performing arts spaces in 5 Kenyan counties; Kisumu, Nakuru, Nairobi, Mombasa, and Lamu. The project is supported by the French Embassy in Kenya through the French Government's Creation Africa programme. Through grants of up to EUR 15,000, the fund will enable creative individuals, collectives and organisations to refine their original productions for showcasing in at least 3 fully equipped cultural venues from the CASIK network.

In addition, the French Embassy in Kenya has committed to strengthen the collaboration between Kenya and France through the CCIs. The Embassy launched Creation Africa Kenya, a project worth EUR 1.2m, further validating the importance of enhancing Kenya's CCIs as a part of France's Foreign Policy. The funds will contribute towards digital content production, digitisation of cultural heritage sites, immersive installations, audiovisual training, and community screenings. The initiative will also empower cultural entrepreneurs with grants for music, performing arts tours, and digital content creation.

D. Development Finance Institutions

• In 2019, the French development agency, AFD, supported HEVA fund in launching the East Africa Creative Business Fund, a loan facility under the Innovative Financing Initiative for Culture (IFIC) project, to invest in creative businesses in five East African countries: Kenya, Uganda, Rwanda, Tanzania, and Ethiopia. The investment facility, of between USD 20,000-USD 50,000, was designed to provide financing for businesses to: restructure interrupted supply chains, increase production capacity, diversify offerings, increase market share, increase integration in local and regional value-chains, support the transition to low-touch and digital capabilities, and take advantage of new opportunities. 7 successful businesses were selected as beneficiaries of the fund.

According to AFD, the partnership, initiated between the European Union, France and HEVA Fund was an excellent example of international collaboration to promote the creative and cultural industries in Eastern Africa and to have transformational impact, by contributing to the rapid evolution of the creative and cultural industries in the East Africa region. Through this fund, HEVA fund strengthened its activities in Kenya and also expanded further into the East African region: specifically Uganda, and Rwanda.

- The African Development Bank has created financing instruments for the CCIs on the continent and in the country through the Fashionomics Africa Programme which builds the capacities of entrepreneurs operating in the Textile, Apparel and Accessories (TA&A) industry, incubating promising entrepreneurs through their accelerator programme, and offering them the opportunity to win grants of up to USD 20,000 through a competitive process.

In 2022 AFDB Fashionomics Africa's second online competition offered USD 6,000 total in cash prizes, mentoring, new branding packages and other support to the winning African designers of sustainable and circular fashion. In 2023, AFDB designed the Fashionomics Africa Online Incubator and Accelerator for African Fashion, Textile, Apparel and Accessories entrepreneurs and businesses who would benefit from the capacity building programme which also offered the potential for a USD 20,000 grant. Through a competitive process, the most promising fashion entrepreneurs will pitch their business ideas at the online Fashionomics Africa Pitching Days Competitions, resulting in 12 finalists who will further compete for the top 2 prizes of USD 20,000 each to scale up their operations.

- The Government of Kenya recently received a USD 390m grant from the World Bank to support the development of the digital economy, a key pillar in Kenya's economic growth. The grant will cover the following 3 components:

1. Digital Infrastructure and Services
2. Digital Government and Services
3. Digital Skills and Markets

The goal of the 3rd component on digital skills and markets is set to equip young Kenyans with digital skills and strengthen their abilities to access and compete in domestic and regional markets through skills development. It will provide mechanisms to improve access to affordable devices and by enhancing the enabling environment for e-commerce to support Kenya's role as a regional digital hub. With the increasingly larger role of digital platforms and skills in the creation and export of creative products and services, the programme continues to seek opportunities to integrate the creative economy into their programming.

- The ACP-EU Ignite Culture programme promotes the CCIs in Africa, the Caribbean, and the Pacific (ACP) regions by providing financial and technical support. In Eastern Africa, it is implemented by the British Council and HEVA Fund with technical support from the Secretariat of the ACP Group of States and funded by the European Union. The programme has committed EUR 4.5m to 37 grantees in 10 countries: Burundi, Ethiopia, Kenya, Madagascar, Mauritius, Rwanda, Somalia, Sudan, Tanzania, and Uganda, who are implementing amazing projects across different value chains for their target communities and demographics.

E. Private funding

- HEVA is the Eastern Africa region's first dedicated investment advisory and knowledge solutions group for the creative economy. They are registered in Kenya, working with CCI practitioners and business owners across 14 countries in the Eastern Africa region, and in partnership with investors and benefactors from around the world. Since 2013, HEVA has been leading a synergistic investment, strategy, policy and economics intervention with a focus on film, music, fashion, gaming and e-sport, digital media and cultural heritage in Kenya and East Africa. For the last ten years, HEVA has developed multidisciplinary experience and expertise in the research and analysis of the creative industries, and is a leader in impact assessment for the CCIs.

HEVA works extensively in both the public and private sectors. For public sector clients, HEVA combines experience in drawing out extensive financial metrics from its applicants and beneficiaries, with subsequent economic and policy analysis. HEVA helps evaluate policies, commercial investment initiatives, regulations and industry support programmes, often taking lead in their design and/or implementation.

Private sector clients engage HEVA to assist with business planning and strategy development, as well as economic analysis to support regulatory positions. Across both sectors, HEVA offers integrated knowledge of market and consumer trends, emerging technologies, regulatory and policy support structures, and competitive conditions to help develop evidence-based policies and strategies for its clients.

In investments, HEVA has innovated and rolled out new financial models tailored for uptake by the creative and cultural industry, directly supported 14000 creative entrepreneurs across the continent in business development, directly invested in 100 creative businesses in multiple value-chains, and supported the development of a favourable and enabling business environment.

- Baraza Media Lab: In response to the COVID-19 pandemic, a number of institutions put together a resilience fund for creative practitioners who were heavily impacted by the economic effects of the pandemic. Similarly, Baraza Media Lab put together the Micro-Okoa Grant. This drew resources from the funds set aside by Baraza for physical events and repurposed them into micro-grants provided to local media practitioners while ensuring diversity in the recipients of the funds.

- Powered by People ("PBP"), the digital wholesale platform, secured USD 8m in series A equity funding. In addition, PBP has received an incremental USD 5.6m in grants from various philanthropic organisations, including TRANSFORM. PBP provides small-batch, independent maker brands from over 70 countries with technology solutions that enable them to sell their sustainably made goods at scale to retail and trade buyers. The company will use the funds to continue scaling its global operations and technology and utilise the new grants to support traditionally underserved makers in Africa and beyond by providing them access to PBP's digital marketplace and expanded financing options. Powered by People has earmarked these grants to provide working capital to its network of creative "makers" through financial instruments such as LPOs.

F. Banking Institutions

- The Equity Bank of Kenya is offering financial training to 40 promising designers, who upon graduating, have the chance to access a USD 1m fund established to strengthen the country's fashion chain-from agriculture to spinners and fabric traders. The bank launched the Design your Destiny project under the bank's Vijana na Equity campaign in 2014 that was aimed at supporting fashion designers in commercialising their ventures.

- In 2013, I&M Bank committed to investing in the CCIs with a dedicated art fund. The lender has invested over KES 120m in a collection of art pieces and partnered with artisan groups across the country, hereby recognising the economic role of art in supporting incomes for Kenyan artists as well as those from the East African region. The bank will further consolidate its efforts by providing financial advisory support.

- In 2018, Stanbic Bank announced a partnership with Cellulant to avail loan facilities to music artists secured by their Skiza ringtone royalties. After the musician has received a loan under this arrangement, Cellulant deducts repayments for the loan from royalties received from Safaricom on behalf of the artists and pays this amount to Stanbic Bank. The requirements for the Skiza product include:

1. Must be registered as a Cellulant Skiza artist
2. Earn more than KES 25,000 per month in royalties
3. Have a clean Credit Reference Bureau record
4. Six months record of Skiza payments

2.3 Headline SWOT of the Kenyan CCIs – with a focus on investment and investor readiness.

STRENGTHS	WEAKNESSESS
- A growing recognition and acknowledgment by Government and society of the economic and social significance of CCIs, fostering supportive policies and initiatives. - Presence of a public sector that is willing to partner with local and global private organisations to design interventions for the CCIs through public-private partnership models. - Kenya has a growing ecosystem of creative individuals in different fields fostering innovation and competitiveness. This rich talent pool possesses the capacity to generate new ideas, products, and services, driving innovation within the country. - A growing market of consumers with increasing purchasing power and appreciation for unique, locally produced artistic creations.	- Inadequate infrastructure, particularly in remote areas, hampers the distribution and access to finance. - Lack of a proper understanding of the market as well as poor understanding of the CCIs by policy makers. - Lack of Infrastructure: Insufficient facilities, studios, and exhibition spaces hinder growth. - Corruption, bureaucracy, and censorship continue to stifle the growth of the CCIs. - Piracy and Copyright Issues: Intellectual property protection remains a challenge. Rights collecting mechanisms are either weak or draconian in their enforcement.

OPPORTUNITIES	THREATS
- Presence of a young population and talented creative workforce. - Presence of a growing market with an increasingly youthful population overall, an expanding middle class, and a growing hunger for value-adding and personalised goods and services. - Presence of local heritage steeped in cultural richness, marked by a legacy of creativity, invention, and a history of trade in aesthetic goods. - Increasing digital penetration through digital roadmap networks across the country. - Technological Advancements: Rapid technological advancements present opportunities for CCIs to leverage digital platforms for content creation, distribution, and monetisation. - Increased access to financial literacy capacity-building resources such as Kenya's Equity Bank's financial training for designers. - Access to digital lending platforms for quick working capital for example, Hustler fund. - Collaborative partnerships with international investors, and institutions that facilitate knowledge exchange, funding, and market access.	- Changes in the administrative regime may indirectly affect public sector programming for the CCIs. - Lack of data on the investment viability and job creation potential of the sector. - Low recognition of creative products and creative assets as collateral that hinders commercial banks from tailoring financing products for the CCIs. - Regulatory constraints such as licensing procedures, censorship policies. - High expenses associated with procuring up-to-date equipment and maintaining access to essential licensed services. - High interest rates from easy-to-access digital mobile lending solutions for small ticket sizes that are not sufficient to support long-term enterprise growth. - Market development and institutional constraints that impede growth of the market and require intervention from the public sector.

Case Study: Inclusive Funding Case Study: Empowering Marginalised Creative Businesses

OTA, founded in 2019 in Nairobi, Kenya, originally with a specific focus on supporting women-owned and women-led businesses, has since evolved into a more inclusive industry-agnostic investment platform.

Recognising the importance of supporting marginalised groups, OTA now extends its assistance to a broader spectrum, prioritising women and cultural minorities, and offering comprehensive business support and financial aid. Among OTA's main priorities are knowledge enhancement, market development, and fostering financial sustainability.

A recent initiative by OTA, the Thrive Fund, exemplifies OTA's commitment to inclusivity, specifically catering to the LGBTQIA+ community. This initiative was crafted through extensive consultations with 12 stakeholders to ensure it meets the unique needs of these businesses. To respect the preferences of businesses not wanting to be publicly associated, closed-call approaches were adopted, sidestepping public announcements. Moreover, identification barriers, particularly affecting trans people and refugees, prompted OTA to exercise leniency in formalisation requirements, instead emphasising milestone achievements.

In response to the needs of the supported ventures, OTA initiated investor readiness programmes. These programmes offer coaching, mentoring, and training in financial literacy and best business practices, ensuring that the businesses are well-equipped for success.

For Thrive's inaugural cohort, the total loan amount allocated stands at $101,670, facilitating the creation of 15 jobs across diverse sectors including fashion, photography, film, and food and hospitality.

Several achievements mark OTA's journey in supporting marginalised creative businesses. Expert support services provided to entrepreneurs have been instrumental in their growth. Additionally, platforms allowing minority-owned businesses to share experiences have fostered a sense of community and collaboration. The adherence to safeguarding principles has ensured trust in the process, while formalisation milestones have enhanced accountability.

Despite these accomplishments, OTA recognises the need for further support to facilitate growth. Additional funding is crucial for scaling up business support services, compensating staff adequately, and investing in research and development efforts. Challenges persist, including the initial scarcity of resources necessitating a proof of concept and the ongoing need for additional resources to support informal businesses adequately. Moreover, addressing mental health challenges faced by minority-owned businesses remains a priority, with innovative solutions such as wellness check-ins and payment moratoriums being explored.

In terms of opportunities for investment and funding, investors and funders are encouraged to consider avenues such as business support services, staff compensation, research and development, and grant funding for the formalisation of informal minority-led businesses.

To enhance the role of Government, donors, and investors in the CCIs, OTA suggests the development of minority-specific funding opportunities and efforts to mitigate the perception of formalisation as expensive and hindering. Through continued collaboration and innovation, OTA aims to further empower marginalised creative businesses and foster a more inclusive entrepreneurial ecosystem.

2.4 Headline barriers and solutions to CCI Investment in Kenya

Based on the interviews and focus groups: the following provide headline analysis from the perspectives of different stakeholders.

2.4.1 Perspectives of creative SMEs

The landscape of creative entrepreneurship is rich with innovation and cultural diversity, yet it is not without its formidable challenges, particularly in the realm of securing investment. Understanding these barriers is essential for crafting strategies that foster a more inclusive and supportive environment, ensuring that the vibrant spectrum of creative businesses can thrive and contribute to the cultural and economic tapestry of Kenya.

Creative entrepreneurs in the Film, Visual Arts, Music, and Creative Tech sectors across the three major cities; Nairobi, Mombasa, and Nakuru shared their experiences with funding/financing/investing and the barriers that are slowing down financing, funding and investments of CCIs business in the country.

Barriers to Investment in the Creative and Cultural Sector

- Financial institutions, including banks and funding organisations, impose stringent portfolio requirements that accentuate the significance of a robust track record. Informal SMEs (Small and Medium Enterprises) encounter difficulties in meeting these criteria, primarily due to the absence of established structures. Maintaining a consistent track record becomes challenging, hampering their eligibility for financial support.

- Certain spaces of the creative community, notably LGBTQIA+ spaces, encounter unique challenges in obtaining funding. The limited funding available for these spaces is often a result of political sensitivity, creating an environment where support is constrained for specific creative endeavours. This underscores the need for a more inclusive approach to funding within the creative sector.

- Geographic Disparities in the distribution of available resources contribute to a lack of visibility and connectivity within the larger creative investment landscape. Creative businesses in Mombasa and Nakuru recognise a need for an enabling ecosystem that promotes their access to the financing/funding/investment opportunities available to them.

- The majority of grant opportunities are tailored to cater to larger Non-Governmental organisations (NGOs) and Community-Based organisations (CBOs). This inadvertently excludes businesses registered as sole proprietors from accessing these funding avenues. The eligibility criteria and application requirements of many grants often favour the organisational structure and scale of NGOs and CBOs, making it challenging for smaller entities, particularly sole proprietorships, to compete for and secure these financial resources.

- For Government funding programmes, there is a disconnect between creatives and government officials which often leads to the formulation of programmes that inadequately address the unique and varied needs of specific CCI sub-sectors. This means interventions generated by government funding programmes become generic and fail to offer tailored support for the different segments within the CCIs. Each creative group, be it visual artists, musicians, or performers, has its own set of challenges, aspirations, and requirements. The one-size-fits-all approach not only neglects these nuances but also limits the effectiveness of the interventions and locks out creatives practising the “less conventional” arts.

- There is a limited understanding of impact where investors and financiers struggle to understand the artistic vision, creative input, and social impact of CCI investments, only focusing on the financial output, limiting the potential for expressive creative outputs.

2.4.2 Perspectives of Investors and Funders

Investors evaluating opportunities in Kenya’s CCIs are confronted with a complex policy and partnership landscape. The institutionalisation of the informal sector is viewed as a positive milestone, providing a more conducive environment for investment. There is growing awareness of the opportunity to invest in the CCIs – driven by a growing domestic and international market for Kenyan creative goods and services and increased professionalisation of CCI firms.

There is also an increasing awareness of the opportunity for impact investment in the Kenyan CCIs – where social outcomes such as a more inclusive and sustainable economy are factors for supporting the CCIs.

However, investors and funders do call for a clearer and more inclusive policy environment. Current challenges include the lack of enforcement when IP laws are compromised; perceived skills gaps in CCI enterprises (e.g. commercial market development skills); and a still emergent recognition of the likely return on investment for the CCIs, with many investors still uncertain they will get their money back.

Marketing challenges, including the prevalence of middlemen and inadequate packaging, can affect the visibility and market penetration of creative products. The absence of supportive tax policies, such as tax holidays for start-ups, and the lack of proper structures around the organisation's structure and operations have been a hindrance for investors looking to penetrate the sector.

Additionally, the lack of research and development capital and knowledge on how to track impact has reduced the ability of funders to come up with sound interventions for the enterprises in the sector.

From an investor perspective, strategies to resolve challenges in Kenya's CCIs involve a multi-faceted approach:

- Working with local fund managers and firms to understand the local CCI landscape and build tailored knowledge of the CCI investment opportunity.
- Investing in initiatives that enhance the commercial knowledge of creative
- entrepreneurs, fostering partnerships with informed and business-savvy ventures.
- Supporting educational programmes to increase awareness of Intellectual
- Property Law, reducing the risk of infringement.
- Engaging with Government to influence tax policies that support the growth of creative enterprises, including tax incentives for start-ups.
- Investing in technology adoption in the CCIs, leveraging digital platforms, AI and advanced tools to enhance the capacity for innovation and market
- competitiveness.
- Explore opportunities for international collaborations to bring in global expertise and foster technological advancements.
- Developing risk mitigation strategies, such as thorough due diligence processes, to protect investments in CCI ventures.

All these are essential steps to creating an environment conducive to sustaining investments in the dynamic and diverse CCIs of Kenya.

2.4.3 Perspectives of Public Sector

The Government's engagement with CCIs is evident through diverse and often quite tailored initiatives like the Ushanga Kenya Initiative and the Talanta Hela programme, focusing on empowering women in beadwork production and supporting youth in the CCIs respectively. Key policies, such as the Culture and Heritage Policy 2023 and the Copyright Act 2001, underscore the Government's commitment to fostering the growth of CCIs.

The Government is increasingly aware of the specific challenges facing the CCIs – which, for example, drive the need for improved business models, more transparent and accessible approaches to business registration, and increased understanding of tax obligations among CCIs. Policy changes and shifts, including the pending Creative Economies Bill, Culture Bill, and Protection of Traditional Knowledge, demonstrate a forward-looking approach.

The Government has recognised the positive impact of mobile loans, like the Hustler Fund, and emphasised the importance of organised groups and public participation in policymaking. Various State Departments have made efforts to overcome barriers, such as engaging the National Assembly, and highlighting the commitment to supporting CCIs despite budget constraints.

Initiatives promoting equality and diversity, such as the Ushanga Initiative and the planned Sanaa App, indicated a conscious effort to address inclusivity within the sector. Various entities consulted for this research have underscored the need for capacity building, grants for emerging CCIs, and tailored financial models for established ones. Additionally, the CCI landscape has evolved with the Government's focus on digital hubs and free Wi-Fi to enable CCIs to leverage technology for growth. While international collaborations are currently limited, there are potential future opportunities for partnerships.

2.4.4 Perspectives of the Private Sector

In Kenya, the CCIs are governed by several policies aimed at institutionalising the informal sector and fostering its growth. One notable milestone has been the institutionalisation of the informal sector, reflecting the Government's commitment to recognising and supporting the diverse contributions of the CCIs.
However, a noteworthy challenge arises from the lack of substantial public participation in the formulation of the Creative Sector Bill and policy. This gap in public engagement poses a hurdle in achieving a comprehensive and widely accepted regulatory framework for the industry and private sector players.

The business environment challenges faced by CCIs in Kenya are multifaceted and impact various facets of the industry. Harassment of artists is identified as a prominent issue, raising concerns about the protection of creative expression. Limited understanding of Intellectual Property Law compounds this challenge, emphasising the need for increased awareness and education within the sector. Commercial knowledge gaps further hinder the growth of creative enterprises, as does the lack of recognition of the sector as a significant source of employment and revenue. Marketing challenges emerge from a high prevalence of middlemen and a lack of innovative packaging for creative products.

Access to credit poses a significant hurdle for the CCIs, as traditional financial institutions exhibit high-risk aversion and classify creative enterprises as high-risk ventures. Additionally, the absence of supportive tax policies, such as tax holidays for start-ups, exacerbates the financial constraints faced by emerging businesses. Difficulty in obtaining licences further impedes the smooth operation of creative enterprises. Addressing these challenges requires a multifaceted approach, involving increased public participation, targeted education, and strategic collaborations to fully unlock the potential of the creative sector in the country.

To counter these challenges and attract support, various strategies and initiatives are being implemented. Large private sector contributions, including the refurbishment of creative spaces and sponsorship of events, contribute to fostering a conducive environment for creative expression. The adoption of technology, including the use of AI and advanced tools, enhances the capacity of human creativity, fostering innovation within the sector. Furthermore, international collaborations provide opportunities for knowledge exchange, resource-sharing, and exposure, contributing to the growth and globalisation of Kenya's CCIs.

Appendix

CCI and partnership context in Kenya - Roles, Responsibilities and Key Programmes

Sector	Relevant Government Authorities	Relevant Sector Bodies	Policy Framework(s)
Film	• KFC • KFCB	• Actors guild, • Producers guild • Kenyan Film and Television Professional Association	2021 Copyright Amendment Act 2020 Kenya Film Bill The Film and Plays Act, Play 222 Incentives & Exemptions - KRA
Music	• MCSK • PRISK • PPMC • Bomas of Kenya • KECOBO	• Events Managers Association of Kenya (EMAK) • Kenya Association of Music Producers (KAMP) • Recording Industry of Kenya (RIKE)	2021 Copyright Amendment Act Passed and signed into a law 2015 National Music Policy Draft Bill
Fashion	• KECOBO	• Kenya Fashion Council	2021 Copyright Amendment Act
Visual Arts	• KECOBO	• Association of Visual Artists and Collectives	2021 Copyright Amendment Act
Creative Tech	• KECOBO		2021 Copyright Amendment Act

• Description of key investment and investment readiness projects, programmes, and interventions over the last 5 years (talanta hela, ignite culture, ch4ig)
Key Investment = USD 100,000

Source of Funds	Implementing Institution(s)	Interven-tion(s)	Size of Fund	Recipients	Financial support offered
Government	Ministry of youth	Talanta Hela	USD 6.4b	Youth in the arts, culture and sports disciplines	Loan of up to KES 2m for working capital or to purchase talent-related equipment
Banking Sector	Equity Bank invested over	N/A	USD 1m	40 promising fashion designers	N/A
	Stanbic Bank in partnership with Cellulant	N/A		Loan facilities for music artists	N/A
	I&M	N/A	KES 120m	Artisan groups	Invested on a collection of art pieces and partnered with artisan groups across the country
Development Funders	AFDB	N/A	N/A	Textile, apparel and accessories creative entrepreneurs	Grants of up to USD
	AFD - Innovative Financing Initiative for Culture (IFIC)	East Africa Creative Business Fund	KES 90m (EUR 800k)	Creative businesses	Creative business loans of up to USD 20k to USD 50k
		HEVA Growth Fund			KES 5m to KES 10m ticket sizes
	Alliance Francaise Creation Africa project	N/A	N/A	Game developers	KES 1m (USD 6500) to each successful project

Investors and Venture Capitalists	Powered by People	N/A	USD 8m in equity funding, USD 5.6m in grants	Makers in the design subsector	N/A
	HEVA Fund	• Ignite Culture Fund • Thrive • Hii Stage • East Africa Creative Business Fund • HEVA Growth Fund • Young Women in Creative Industry Fund • Cultural Heritage for Inclusive Growth Fund	Cumulative investment of USD 10m in grants, loans, ecosystem building work	• Creative practitioners in East Africa and Indian Oceanic countries. • Vulnerable/ marginalised practitioners • Young women-led businesses	Grants and loans with ticket sizes between USD 5k to USD 180k

Donors	ACP-EU (Implemented by BC and HEVA)	Ignite Culture (2020-2023)	EUR 4.6m	MSMEs, SMEs, NGOs, CBOs, Government Institutions	Grants ranging from EUR 30k-180k
	Forum Civ	Wajibu Wetu	USD 6b	Media, Arts, Cultural and Gender-focused civil society organisations	
	French Embassy	Hii Stage		Creatives Practitioners in Theatre, Film, Live Music, Spoken word, Poetry, Storytelling, Dialogue, Dance, Comedy, Magic, Puppetry/ Pantomime and Multimedia and Transdisciplinary arts	Grants up to EUR 15k
		Creation Africa	EUR 1.2m	Cultural entrepreneurs with grants for music, performing arts tours, and digital content creation	Grants
	Goethe Institut	Jenga CCI	N/A	Young women in Creative Industries	KES 1m in Loans
	British Council	Creative DNA	N/A	Fashion Entrepreneurs	KES 655k
		Cultural Protection Fund+ Cultural Heritage For Inclusive Growth	Grants up to GBP 100k	N/A	KES 500,000 to KES 3m, repayable within 24 months.

	Africa No Filter	Last Mile Film Fund	N/A	African FilmMakers	Grants of up to USD 10k for feature-length films and up to USD 5k for short films

Workshop Participants

Stephanie Gogo
•Hustle Sasa

Rachel Wamoto
•Monateng

Carol Ngorobi
•Jukwaa Arts Productions

Michael Kamunya
•Playmakers

Yonah Mudibo
•Nzuri Sanaa

Robert Mrima
•Roka Bags Africa

Duncan Thungu
•Galacha Creatives

Joseph Maina
•Arts Ablaze

Rahab Nderu
•Lotus Hotel

Michael Musyoka
•Brush Tu

List of interviewees

NAME	ORGANISATION
Ezekiel Onyango	Kenya Film and Television Professional Association
Carol Warui	Kenya Private Sector Alliance (KEPSA)
Selina Onyando	Africa Practice
Sheila Akwanny	Goethe Institut
George Ondeng	State Department for Culture Ministry of Gender, Culture, the Arts and Heritage
Catherine Kerubo	Transzoia County