Unlocking the Potential of the Creative and Cultural Industries in Africa

The Future of African Fashion, Film, & Music

July 2020

Botho
Emerging Markets Group

Table of Contents

Abbreviations

AfCFTA	African Continental Free Trade Agreement
AGOA	African Growth and Opportunity Act
AU	African Union
CCI	Cultural and creative industries
DSPs	Digital Service Providers
ESO	Entrepreneur Support Organisations
IFPI	International Federation of the Phonographic Industry
SMEs	Small and Medium Enterprises
SVOD	Subscription Video on Demand
T&A	Textiles and Apparel
US	United States
WMG	Warner Music Group

Acknowledgements

We would like to thank the many industry experts for their contribution to our research and their willingness to share their perspectives and insights on the state of the creative and cultural industries in Africa. In particular, we would like to thank: Safietou Seck, Akinyi Odongo, Anna Rykova, George Gachara, Emanuela Gregorio, Mwaniki Mageria, Antoinette Tesha, Thabiso Khati, Tega Oghenejobo, Demilade Olaosun, Olakunle Oladehin, and Brian “Kedi” Kedemi.

Executive Summary

Emerging markets, particularly those in Africa, are home to vibrant creative and cultural industries (CCI) with massive investment potential. From the Yoruba to the Kongo, African civilizations have shaped the aesthetics, music, sculpture, textiles, and architecture of regions from North America to Latin America and Europe for centuries. Despite this outsized impact on major cultural exports from jazz to dance, Africa's creative and cultural industries remain underdeveloped today. However, recent advancements in technology, data, and intellectual property now poise artists across the continent to reap a profit from this economic opportunity and carve out a share of the trillion-dollar global market for music, film, and fashion.

Africa's creative and cultural industries are marked by a constant push and pull between contrasting factors - long-established practices versus disruptions caused by technology, fragmentation versus collaboration, and global access versus local appeal. The growth of technology and access to data across the data presents a unique opportunity to help this burgeoning sector generate jobs and revenue within local markets. It is clear, however, that despite the many available opportunities for creatives to venture out independently, collaboration will be the foundation of future industry growth. While regional and global creative exports from Africa are on the rise, this trajectory is only sustainable if stable, revenue-generating markets develop. (*Cont'd*)

Success Drivers for the CCI in Africa

Urbanization	Young Demographics
Increased Internet & Mobile Penetration	Expanding & Emerging Middle Class

Executive Summary, Cont.

The key findings of this brief are that, to nurture the growth of Africa's creative and cultural industries, creatives and their surrounding support networks must:

1. **Leverage the power of regional agreements:** As the African Continental Free Trade Agreement (AfCFTA) enters into force, promotion of Pan-African creative collaboration may allow individual countries to specialize in unique products.

2. **Build a unified voice:** In order to impact policy, artists within the various creative and cultural industries must come together to establish platforms advocating for policies and practices to support their growth.

3. **Harness technology:** Technology can be used to disseminate creative products as well as to create value through interactive experiences for fans (e.g. live musical performances, fashion shows).

4. **Aggregate data and leverage insights:** There is insufficient data about 1) the viability and impact of an intra-African collaboration across the CCI sectors, 2) the impacts that countries who have developed economic instruments to grow their CCIs have experienced, 3) consumer habits and trends, and 4) the market size and investment opportunities across different countries in Africa. Filling the data gap will require collaboration among key stakeholders across all African countries.

5. **Create systems to drive monetization:** Structures to monetize African creative products are rare. As a result, many creatives across the region earn much less than their global counterparts. In a sector like music, for example, collection houses are just one strategy that can be used to protect and facilitate payments to artists when their music and material are used across various platforms. Meanwhile, in fashion, countries can come together to enact national or regional protections or negotiate favorable trade agreements to support the growth of local textile and apparel industries and reduce the availability of cheap, imported clothes.

6. **Train and upskill artisans:** African creatives need training and support to achieve large-scale profitability, innovation, and efficiency. The support can be delivered through partners such as accelerators, tech hubs, and bootcamps for entrepreneurs.

1

TECHNOLOGY

Technology disrupted traditional models globally, transforming business operations and services across all sectors - from agriculture to financial services. Across the music, film, and fashion industries, technology has created different levels of impact by breaking down barriers to production, spurring dialogue on the need for comprehensive and reliable data, and changing the ways consumers access these industries.

Music

Technology creates an unparalleled opportunity for musicians to expand beyond their geographical locations to reach different audiences across the globe. In doing so, it has revolutionized the music industry where, previously, content was recorded on CDs or distributed through radio channels. Reports now indicate that consumer habits are increasingly shifting to accessing content through digital platforms. According to a 2019 report by the International Federation of the Phonographic Industry (IFPI), people are increasingly shifting to accessing music through digital platforms, resulting in a 21.1% increase in digital revenues, while physical revenues - such as CD sales - dropped by 10.1% in 2018. Due to its young, digitally connected population (the average age on the continent is 19.4 years and 60% of the population is under 25 years, the youngest population of any region globally), Africa presents a massive opportunity for artists seeking to reach wider audiences. A recent report by PriceWaterhouseCoopers indicates that entertainment and media spending in the 10 youngest markets worldwide is growing three times as rapidly as in the 10 oldest markets.

Streaming and the consumption of music through digital platforms grew consistently over the past four years, with a 32.9% rise in paid streaming in 2018. Given the growing preference for digital platforms, African musicians must be strategic about capitalizing on the limitless opportunities presented by the internet and the experiences they can create for their fans. The first step in exploiting this opportunity is obtaining proper licensing followed by the digitization of the songs.

Artists must also be proactive about using multiple platforms to increase the touchpoints between themselves and their fans, as consumer behavior is constantly changing. Closely monitoring and strategizing to accommodate consumer behavior in publishing music is particularly important now given the interruptions COVID-19 has created in the music industry.[1] Tours, festivals, and live shows have been rescheduled or canceled and the pandemic creates a lot of uncertainty and indefinitely closed off some revenue streams for artists.

If certain experiences cannot be replicated, they can be reconfigured. As Thabiso Khati, popularly known as the 'Hip-hop Scholar' due to his significant contributions to the development of South Africa's music industry, explained,

It's about "creating value not just in music, but [also] in interactions." Live shows serve as a point of connection not just for artists and their fans, but they also create a community where fans can connect with each other.

A similar, if not equivalent experience can be created online through streamed concerts and performances, and social media competitions.[2] The music released during the pandemic, if delivered creatively, can still achieve outstanding levels of success. For instance, *Toosie Slide*, a song by Drake that features its own dance: the song hit 1 billion views on TikTok in just two days and (at the time of writing this report) had 70 million views on YouTube, only four weeks after its release.

Film

Similar to the music industry, technology has fundamentally changed both African film production and distribution. Five decades ago, cameras were operated by a full crew to get an aerial shot, which needed an aircraft-mounted camera that was so heavy it most likely weighed more than the plane itself! Once the film was captured, the editing was done by physically cutting and pasting the films together, which would take an average of three and a half months. Today, new, lighter cameras allow for clearer images and shots never thought possible, and with the incorporation of cloud technologies, editing films has never been easier. Teams recording films across the globe can now work on the same film remotely.

Instead of going to the local theatre to catch the nightly showing of a movie, on-demand, streaming services, smartphones, the internet, and TV provide an opportunity to watch films anywhere instantaneously. That said, in-theatre experiences have also not been left behind - enhancements in sounds and visuals such as 3D enhance audience experiences and create more immersive experiences for users.

Video-On-Demand Platforms

How do Subscription Video-on-Demand platforms work?

There are two key ways African content makers distribute their content on video-on-demand platforms: licensing and specialized agreements with production houses. When licensing, video-on-demand platforms obtain permissions (licensing agreements) from the content owners to display their films for a specified amount of time. On the other hand, specialized agreements are used when displaying original content where these platforms form agreements with production houses to transfer full ownership of the films.

Africans have quickly embraced video-on-demand services, and subscriber numbers across 35 Sub-Saharan African countries are forecasted to hit 10 million by 2023. Consumers across the region list flexibility, low cost, and convenience as some of the main reasons they would rather subscribe to a streaming platform as compared to cable TV. Additionally, increased internet and mobile penetration rates in Africa caused a surge in accessing films through the video-on-demand platforms.

Current players:

1. Netflix, the world's largest streaming company, announced its investment in Nigeria's film industry, Nollywood, and its plans to expand across Africa in March 2020. Netflix's expansion plans include commissioning original content by partnering with local creatives, which offers African filmmakers global visibility.

Regionally, there are other video-on-demand platforms that focus on distributing African content, and these include:

2. iROKO, launched in 2011 by Nigerian entrepreneur Jason Njoku, is a multimedia company that licenses, distributes, streams, and produces Nollywood content and offers both subscription video on demand (SVOD) service iROKO.tv and an Android app service.

3. Showmax, an SVOD service offering African and non-African content in 36 African countries as well as in several non-African countries such as Poland and the United Kingdom. Showmax was launched in 2015 from South Africa as a brand of multimedia company Naspers—arguably the largest and wealthiest media corporation based in Africa and the owner of South African pay-TV channel M-Net and digital satellite company DStv.

4. Viusasa, an SVOD owned by Kenya's Royal Media Services that is accessible via web and app. The service offers movies, videos, and live television channels. It has content available in nearly all of Kenya's local languages.

Film

Benefits of technology in the film sector include:

***Cost reduction*:** The high costs associated with recording on film, rather than digitally, hindered the growth of independent filmmakers. In the 1990s, the cost of movie production was at an all-time high due to higher costs for movie stars, agency fees, rising production costs, and advertising campaigns. In recent years, however, independent filmmaking is now on the rise due to falling costs of digital and advanced cameras and a reduction in the number of crew members required for a shoot. Improvements in camera technology have cut down on movie production time and lowered the cost through easier storage, preservation, and distribution.

***Efficient and improved production processes*:** Technology has improved the efficiency of film production and post-production. At the production stage, for example, filmmakers now increasingly use digital cameras that can capture multiple angles of a scene simultaneously and capture visuals in high definition. These advances not only improve the quality of the finished product, but also allow actors to receive real-time feedback on their performances.

Software advances have also lowered the cost and time required to edit. In the past, shooting required large amounts of film, much of which was delicate—even the smallest scratch while reloading the camera could have ruined an entire scene. Now, post-production edits can be made through platforms such as Avid Media Composer and Final Cut Pro where special effects and audiovisual treatments can be added more easily.

***Increased access to finance*:** Growing popularity of crowdfunding—in which small contributions from individuals are gathered—now helps make up the budget shortfall of a growing number of films. The personal stake of these contributors in financing the film can be an asset when it comes to marketing and distribution. Additionally, if a filmmaker can generate sufficient publicity via crowdfunding and receives enough donations to start production, they can leverage this buzz to identify sponsorship opportunities from large organizations. Strong publicity at the production stage of the film demonstrates market demand to investors.

***Improved promotion & distribution*:** Prior to the widespread use of the internet, film studios promoted upcoming films through posters, magazine ads, newspaper articles, billboards, and if the budget allowed, TV interviews. Traditional distribution systems still required significant market research to determine when and where to market films they were producing.

The increased sophistication of social media advertising, coupled with the ability to generate a following through hashtags and influencers, now allows filmmakers to target particular demographics with similar interests across the globe.

***New ways to bring animations to life*:** In traditional animation, hand-drawn figures are digitally inked and colored by computers; however, today, nearly all animations are digital. With the help of computers, digital pens, tablets, and digital sculpting tools, production times and costs have decreased dramatically. Things that were previously only possible for major studios 20 years ago can now be done by one person or a small film crew.

Fashion

Fashion is regulated by rules and standards from both countries of origin and destination; technology alone cannot democratize fashion the same ways it can with African film or music. There is not yet a version of Spotify, Youtube, Apple Music, or even ViuSasa or iRoko for African fashion.

Technology can help break down some of the barriers African fashion faces, but it is not a cure-all.

E-commerce, for example, can move African fashion around Africa and the world, but faces challenges in its uptake on the continent. For example, South African shoppers surveyed in February 2020 spent an average of $109 on online purchases. While this figure is the highest in Africa, it is $400 lower than the global average. In fact, the six African countries featured still ranked in the global bottom 10. However, in a world recovering from COVID-19, restrictions on movement and congregation will combine with changing consumer habits and business operations to create "a new normal" in how people access clothing. In addition, if well-utilized by creatives and business owners, e-commerce can break down barriers to access to African fashion for African diasporas and for the African middle and upper classes. In turn, it can create regional value chains and economies of scale that could ultimately make African fashion globally competitive.

SPOTLIGHT

KISUA

KISUA, a South African fashion company that is unlocking the African design economy, has distribution centers and logistics systems across Africa, the United States, and Europe. The company serves a global customer base via a team of African designers and tailors.

On KISUA's website, a Nigerian living in the United Kingdom can order a dress made in South Africa with Ghanaian cotton with the click of a button, without any headaches about payments that are common among e-commerce sites on the continent. African fashion players can take advantage of these platforms, along with the "Buy" feature on Instagram and Facebook's new Facebook Shops, to adjust to a world where people now look to shop online more than ever before. In this new reality, brands must build trust with their customers by selling high-quality merchandise and running efficient logistics operations that get orders to customers in a timely manner and allow them to return products stress-free.

Technology Disrupts How Consumers Interact with the Fashion Industry Across Emerging Markets

Congolese designer Anifa Mvuemba, the founder of the brand Hanifa, showcased her groundbreaking fashion show in May 2020 on an Instagram Live that featured 3D models in her new Pink Label Congo collection. These new kinds of technology-enhanced experiences are expected to be the next wave in fashion, and emerging markets outside of Africa are already delving into combining art and fashion with other kinds of experiences, including theme parks for art and technologies from the Fourth Industrial Revolution.

In East and Southeast Asia, entrepreneurs have combined fashion with live streaming, virtual reality, and robotics to create new experiences for their customers, which may be especially relevant in a post-COVID-19 world. ShopShops, a Chinese business, took the ethos of QVC (a television network) and transformed it into a platform for Chinese consumers to buy luxury items from the United States (US) without ever leaving their couches.

ShopShops is streamed live in American designer flagship stores and luxury department stores to thousands of Chinese customers on Alibaba's Taobao app, which allows customers to ask questions about and order the products they see in real-time. This product is lucrative given Chinese tourists' interest in visiting the US for shopping - in 2019, 3 million Chinese tourists visited the US and spent an average of $12,150 per person, with 86% of respondents sharing they shopped during their visit (the most common response among all listed activities).

In Singapore, Paragon shopping center uses robotics and virtual reality to create an innovative kind of merchandising and to offer new meaning to the term "window shopping". In 2017, the mall set up projectors streaming runway shows, offering virtual reality goggles showing a fashion show where "mannequins morphed into models" with Paragon as the background. The displays featured a robotic arm at their center that picked up and moved around clear boxes with different luxury items, giving customers a 360-view of potential purchases.

Fashion

E-commerce's benefits may be limited to Africa's diaspora and middle and upper classes due to affordability. Ultimately, most clothing produced, designed, and sold in Africa competes with imported used clothes, which sell at such a cheap cost that it is virtually impossible for locally made clothes to compete. Cheaper imported clothes pose a major barrier to growth that technology cannot fix and will have to be addressed through policy and protections for Africa's domestic fashion industries instead.

Imports of used clothes from the West into Africa began through the International Monetary Fund's structural adjustment programs in the 1980s that forced privatization and substitution with imports from developed countries for textiles and apparel (T&A) and sugar, among other sectors, decimating many of Africa's once-thriving T&A industries.

The East African Community was slated to ban imported used clothes — known locally as *mitumba* — all together by 2019. However, several countries, including regional leader Kenya, backed out after the United States threatened to remove protections under the African Growth and Opportunity Act (AGOA) that offers African countries duty-free access to US markets. Rwanda, whose T&A industry was least dependent on AGOA, was the only country to go through with it and forgo immediate positive economic impact for more robust growth in the long-term. There is evidence that Rwanda's fashion industry has grown despite backing out of AGOA, partially due to government allocation of money and resources towards its development.

Going forward, countries can only ban imports of used clothes altogether if they are prepared to support their domestic fashion sector. If countries are not willing to ban imported clothes altogether, they can leverage their collective bargaining power to create more advantageous trade agreements with the United States and other major markets. Kenya, for example, might adopt this strategy during its undergoing talks for a free trade agreement with the United States.

Film

While advertising "The Greatest Showman", a musical about P.T. Barnum's efforts to build a circus featuring bearded ladies, dwarfs, and the like, *Fox* executives thought it would succeed among the same fan base that flocked to see "La La Land" and "Les Miserables." Viewership numbers however, revealed that 75% of the people who viewed the trailer online bought tickets for "Beauty and the Beast", "Pitch Perfect", and "Cinderella". Upon further analysis, the executives realized that the films featured characters shunned by society. That information led the producers to alter their advertising campaigns and emphasized the message of inclusion. That is the critical role that data plays in the film industry - it helps filmmakers understand and effectively adjust to audience needs ultimately ensuring an increased return on their investment.

In the past, filmmakers often lacked sufficient data on who bought their films — data segmentation was high-level (gender, age, and income) and filmmakers were forced to rely on test audiences or surveys to try and understand viewer preferences.

As more people access films on smartphones, tablets, and computers, technology now offers more opportunities to collect data on viewer habits to shape marketing decisions and projections regarding revenue and viewership.

Netflix, for example, continues to improve upon its best-in-class adaptive streaming algorithms to create personalized user experiences and improve streaming quality.

If a viewer is watching a series, the platform can use predictive caching to partially cache the next episode, which allows the video to play faster and at a higher quality to maintain engagement. These advancements in technology are what have greatly contributed to Netflix's average annual increase of 30% in profits since 2015.

Despite global advances in data collection, the African film industry still lags behind when it comes to aggregating, analyzing, and building upon audience insights. Nairobi Half-Life, for example, of Kenya's most acclaimed films, cost approximately US $500,000 to produce but only generated US $150,000.[3] Bridging the data gaps in Africa's film industry will require collaborative efforts among all the stakeholders in the film production and distribution process as well as the engagement of data experts. Technology can ease this process if streaming platforms build algorithms to track consumer behavior and preferences.

Film

Data is key to the growth of Africa's film industry in more ways than one. It is critical to the development of effective policies, strategies, and regulatory tools for a dynamic film industry. Additionally, data makes the film sector more accessible to investors and enhances recognition of the contribution of film industries to the national economy. Thirdly, performance data of audiovisual works is vital in assessing the value of intellectual property remunerations payable to creators. Lastly, understanding and predicting audience tastes will help African filmmakers refine their products and only produce movies and shows that have a high likelihood of success.

With an endless array of movies and TV shows for users to choose from, retaining viewers is of paramount importance to streaming service providers and filmmakers. To compete at a global scale and retain viewership, African filmmakers need to embrace and invest in the needed technology that will help acquire relevant data.

Acquiring audience data does not always mean filmmakers must invest thousands of dollars in complex technologies. Instead, there are less costly alternatives such as social media that allow for audience research and support building a strong fanbase.

Fashion

There is insufficient data on the African fashion sector, and the systems to fill this data gap are lacking. The lack of data exists at three levels - continental, national, and consumer - and has policy, investment, and business viability implications; it also prevents mass production of clothing by African companies for Africans. However, the lack of data cannot be fixed by technology alone and will require collaboration on regulations and economic policy between the African Union (AU), especially the team behind the African Continental Free Trade Agreement; national governments; statistics and economic bureaus; and the private sector.

At a continental level, there is a dearth of publicly available data about 1) the viability and impact of an intra-African trade of textiles and apparel and 2) the impacts that countries who have developed economic instruments to grow their domestic fashion industries, like Special Economic Zones and industrial parks in Madagascar and Ethiopia, respectively, are already having and can in the future have on the same.

At a national level, data available from national economic bureaus or statistics agencies tend to lump all creative and cultural industries together. When the data are disaggregated, fashion data focuses on textiles and apparel manufacturing.

That information tends to be geared towards export out of Africa and not about other bespoke parts of the fashion industry, including cottage industries like tailoring, luxury consignments, or artisanry and handiwork that is associated with traditional African clothing.

Informality also lends itself to this problem. Many actors in Africa's fashion and T&A industries operate in the informal sector, and thus there are no regular or official channels through which data can be collected on them. At the consumer level, for example, there is no broad quantitative data about people's feelings about buying and wearing *mitumba* and if they would prefer to wear the same items if they were made locally instead.[4]

At the policy level, the lack of or unclear data disaggregation means that practitioners and policymakers cannot properly assess the role or the potential of the fashion industry in different economies. It prevents these same actors from creating smart protections for their respective countries' fashion industries that could allow them to thrive and gain mass popularity regionally and in turn, it inhibits the creation of regional value chains that could drive those conditions.

In the investment realm, despite the potential for the industry to be lucrative, local and foreign parties may find it difficult to identify investment opportunities. At a business level, not having market intelligence that can justify investments and assess potential returns prevents entrepreneurs from accessing finance.

Fashion

Now that data has been identified as a major issue in Africa's fashion industries, what can be done about it? Governments and their national economic statistics agencies can collect and publish data consistently (ideally annually) that properly disaggregates the creative and cultural industries and at least minorly separates some distinct value chains within them, like mass textile and apparel manufacturing from bespoke tailoring work. States that have developed domestic fashion industries like Ethiopia and Madagascar can, together with the African Union, evaluate the impact of their economic tools on their trade with other African countries and continue to evaluate it with the implementation of the AfCFTA.

Businesses, particularly those that sell online via Instagram, Facebook Shops, and other e-commerce platforms, can use websites' analytics and their customer data to generate valuable market intelligence on their own. These actions and underlying association collaboration will significantly contribute to improving the availability of data within the African fashion industry.

Music

Data on the music industry in Africa is also insufficient, making it challenging to estimate the size of the industry, the performance of artists in different countries, and how they rank against other artists globally. The situation is so severe that IFPI previously indicated that they still are unable to clearly determine the actual revenues generated in the music sector in Africa.

Accurate data is critical for the growth and development of the industry, not just for global visibility but also for intra-African collaboration. Stakeholders in the music value chain within different countries in Africa indicated that they lack sufficient information regarding other markets within Africa - apart from the common suspects such as South Africa, Nigeria, Ghana, and Kenya.[5] Data is an important tool in shaping and influencing policy governing the music and creative industry as a whole. Secondly, data on industry performance is a significant contributor to generating investments. Finally, information on consumer habits can enable artists to better understand and connect with their fans, ultimately promoting their ability to grow and scale their brand and increase the reach of their music both locally and internationally.[6]

According to Tega Oghenejobo, the Chief Operations Officer at Mavin Records, a leading African record label founded in Nigeria, Africa needs stronger models to support information sharing across borders on the opportunities that lie in each of the countries and platforms for artists from around the continent to engage with each other.

The industry is fragmented within countries and while most if not all African countries possess great music, accessing that information or content is difficult. Producers in Nigeria looking for unique intra-African collaboration partnerships in another African country incur significant search costs just to identify suitable talent. Therefore, while the continent is rich in terms of talent, platforms for data sharing have to be built for both African and foreign artists to be able to identify and tap into the opportunities in the continent.

Collection societies have the potential to become data hubs and bridge the existing gaps on the performance of the music sector across Africa – information that has been deemed difficult to uncover. An effective approach would require collection societies from each country to adopt a collaborative, standardized approach in fill the data gaps in Africa's music industry.

2

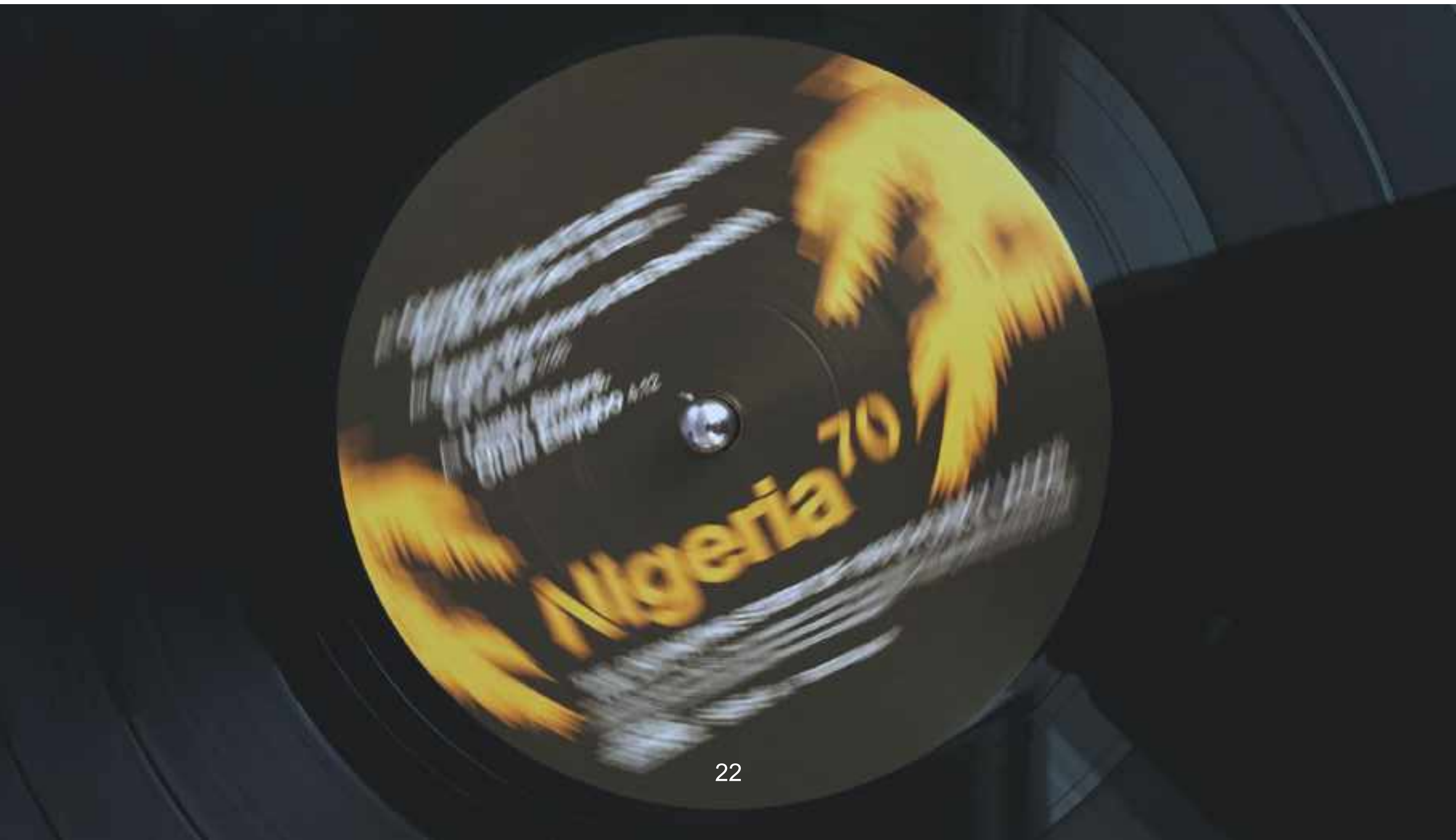
COLLABORATION

With the ratification of the Africa Continental Free Trade Agreement, intra-African collaboration is a priority for many people thinking and writing about Africa's economic future. Intra-African collaboration is relevant in the creative and cultural industries, which require collective action to institute proper systems for revenue collection, enhance production and distribution channels, and lobby for policies that can allow the industries to thrive. As a start, governments should enhance the capacity of their collective societies, which are non-governmental entities that license copyrighted works on behalf of creatives, typically musicians, filmmakers, and authors, and distribute royalties. Collection societies and national and regional councils that focus on music, film, and fashion, along with accelerators that focus on upskilling and utilizing the expertise of experienced creatives, will be crucial in bringing this reality to life.

Music

Collective societies and regional representative bodies could play a key role in the music sector in Africa. Currently, the African market lacks proper systems of revenue collection, with many African artists earning much less than their global counterparts. Africa accounts for just 2% of global music revenues and 1% of royalty collection revenues. Africa has all the fundamentals for a thriving music industry - a diverse talent pool, a young population and increasing internet penetration - but has yet to achieve its full potential. Thabiso Khati highlighted the fact that apart from South Africa, other African markets lack sophisticated industries and ecosystems to monetize their music sector. More specifically, these markets lack collection houses that are necessary to create a system of tracing the revenue that has been collected in these markets. This is a big problem, not just for artists who may make fewer earnings, but also for driving investments into this sector as the actual market size and earning potential would be difficult to estimate.

According to Demilade Olaosun, a media and entertainment lawyer in Nigeria, collection houses are hardly ever able to collaborate or coordinate their efforts, which has made it difficult for them to even work with artists. In Nigeria for instance, there are two collection houses both claiming that they have the right to collect on behalf of artists. Due to the conflicts and disagreements between these collection houses, many artists have resorted to executing publishing deals with international publishing societies. Unfortunately, few artists are able to get the attention of these publishing societies, which means that many are left unable to collect revenues when their music is played across the continent.



Botho

Music

To generate revenues for artists and improve music's contribution to gross domestic product, a predictable royalties collection tracing system for each time music must be established. More importantly, collection houses should be developed to protect and facilitate payments to artists when their music and material are aired.

Unfortunately, the current reporting of publishing rights and royalties collection across the continent is incoherent, which means that even as paid streaming grows, the same may not be reflected in income by artists across the continent. A 2019 report by the International Confederation of Societies of Authors and Composers revealed that Africa collected a total of €78 million (USD 86.54 million) in royalties in 2018, an increase of only 0.7% from 2017. The amount also represents less than 1% of the total contribution globally, compared to Europe's 56.4%.

At a national level, some countries are making strides to facilitate the monetization of music. For example, South African collecting society Capasso launched a licensing hub for Africa, which currently includes 17 collection houses in Algeria, Kenya, Ghana, and others. Global equivalents include hubs such as Ice and Armonia in Europe - by 2019 Ice had passed the €1bn (USD 1.11 billion) mark for digital royalties distributed to its societies on behalf of creators.

The advantage created by regional hubs is that they are able to collect royalties across multiple territories under a single agreement. The Pan African Licensing hub founded by Capasso signed deals with Apple Music, YouTube, Facebook and Spotify, and African streaming services like Boomplay, Udux, MusicTime, and Mdundo.

Governments across different countries in Africa must work closely with representatives from the music industry in establishing collective societies. The Cape Verdean Society of Music, together with the International Council of Music Creators and other stakeholders, worked to implement reforms like increased licensing and training their artists in the industry to enable creators to collect revenue from their music. In April 2018, the society distributed payments to artists for the first time. The reforms were informed with the Integrated Strategic Plan for the Development of the Creative Economy in Cape Verde, created by the Ministry of Culture to consolidate the internal market for cultural and creative products and to increase jobs, incomes and business opportunities, strengthen diversity and cultural identity, and promote the commercialization and marketing of cultural and creative products in national and international markets.

Film

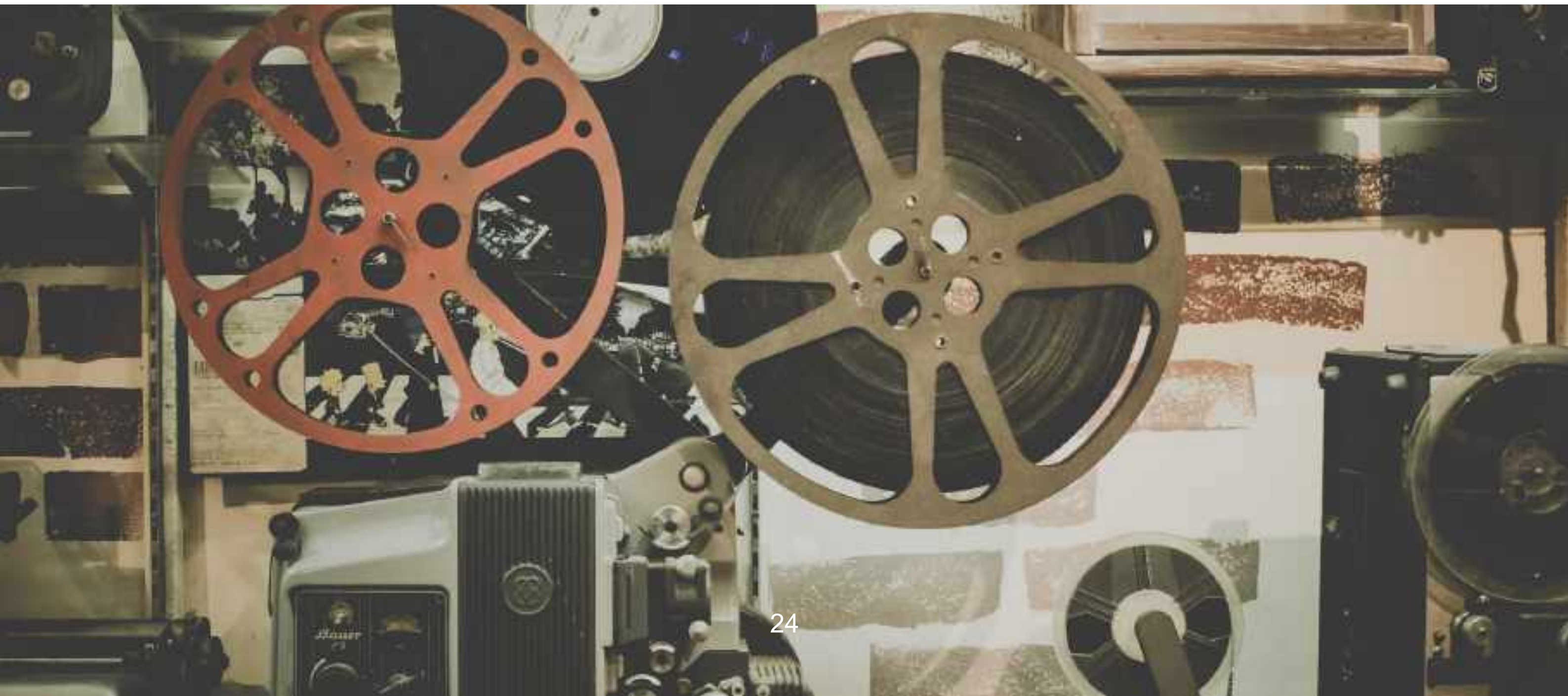
At the national level, many African countries have their own film associations and boards that play a significant role in regulating the sector and spurring its development. However, Africa's film industry is highly fragmented and lacks regional and continent-wide collaborative frameworks that would go a long way in enhancing film production and distribution. The Africa Continental Free Trade Agreement provides a solid starting point to address this challenge. The agreement is expected to include a provision on intellectual property in its second phase, a move that could transform collaborations not only in film but other creative sectors across the continent as well.

Pan-African integration in the film industry has high potential. Limiting the scope of the industry to national territories stunts the growth of Africa's film industries and curtails the possibility of various markets specializing in different types of films.

So far, competitive co-production incentives are available in countries such as South Africa, Kenya, and Senegal. In South Africa, for instance, foreign filmmakers receive various tax reductions if a film is produced (filming and post-production) in South Africa.

The AfCFTA has the ability to create a formalized platform that will encourage co-production not only among African countries but also with other countries globally. Some of the shared solutions needed for intra-African co-production to become effective include efforts such as increasing access to finance for African filmmakers, strengthening business and technical skills, and developing collective go-to-market strategies to attract continental and international audiences.

Despite the many linguistic and cultural differences across the continent, there are also numerous shared experiences and perspectives that create a mutual ground for collaboration across African countries. Lessons can be drawn from the African music industry, which has demonstrated the power of collaboration in creating products that appeal to growing audiences across the continent.



Fashion

The fashion and textile and apparel industries in many African markets share a common denominator: fragmentation that inhibits growth and creates blind spots about potential investment opportunities. Workers in fashion are spread across cottage industries, small and medium enterprises (SMEs), multinational corporations, and even refugee camps. A lack of collective voice and platforms for national coordination means the industry lacks the channels to influence policy and practice that could significantly impact the sectors and its workers.

In one given country, there may be multiple fashion councils all working towards different goals under the same guise of representation of the country's designers. One the other end of the spectrum, there could be an absence of a council altogether, as is the case in Senegal. According to Antoinette Tesha, the Textiles & Apparel Industry Director at Msingi, an organization working to build dynamic and globally competitive industries in East Africa,

"There are instances where associations require further support if they are to become better at drawing in members and evolve to truly represent the voice of the industry at a whole."

In the past, various associations have made efforts to convene industry players. However, without adequate support and resources, many of these end up becoming the burden of a few individuals facing the enormous task of organizing and running the association. More support, either from government (as is the case in India) or development actors, can go far in strengthening associations to fulfill the important role of representing a collective voice.

Fashion and textile and apparel policy issues fall under different departments within governments that do not naturally intersect, which can lead to a lack of coordination and cohesion in national economic policy. Across the eastern coast of the continent, there are examples of conflicting policies as a result of separate ministries having oversight of different parts of the value chain, such as garments falling under manufacturing while training falls under ministries of education.

Similarly, manufacturers' associations crosscut various segments of the industry, but traders and end-market actors often fall within other non-manufacturing associations, making whole-industry coordination challenging. More coordination and inclusion is required for economic, fiscal and legal reforms to be designed in a way that will benefit smaller actors the most.[7]

African-led organizations like Msingi work to bridge the gaps caused by fragmentation. They are supporting the government to create a textiles and apparel-specific platform where they can convene decision-makers, cultivate a space where government and people in the industry can listen to one another, and as such create more cohesive policies. This approach is relevant for policies around intellectual property, which is often considered the creative industries' most valuable asset.

If successful, this collaborative model could be adapted in other countries that have committed to developing their textiles and apparel industry. Akinyi Odongo, Chair of the Kenya Fashion Council, notes that with time, policy and tax dockets eventually will be coordinated in one place, which would be incredibly beneficial for SMEs working in fashion as it would limit the different bureaucracies that businesses have to navigate.[8]

Music

Collaboration, mentorship, and upskilling emerging creatives are critical growth of Africa's music industry. Many artists new to the music scene lack sufficient information on the music industry such as how to monetize their music, protective tools they can put in place to reduce piracy, and how to manage the many middlemen in the industry.

To realize Africa's music industry's massive potential, artists, collection houses, and other stakeholders across the continent must actively work together and become ambassadors of African music. Moreover, national music societies must take action in filling information gaps about the opportunities in their countries and across the region. Facilitating accessible information about Africa's music industry and possible monetization models may incentivize more African artists to collaborate across borders.

According to Thabiso Khati, collaboration should extend beyond simply making music together.

The growth of South Africa's music industry has been driven by people transcending competition in favor of collaborating to build the industry fundamentals necessary for healthy competition. This type of "pre-competitive collaboration" is necessary for the growth of the industry across the continent.

Artists, producers, and managers should leverage their collective skills and support each other in addressing cross-cutting issues, in music production and distribution and well as the business and transactional elements of the music industry.

Additionally, national collective societies should work together to promote intra-African music collaborations, which will drive continent-wide growth. African artists should promote the continent's music to raise awareness and increase its popularity internationally. Actions such as these will likely cause a ripple effect across the continent and will boost the already growing music sector in Africa.

Select Initiatives Supporting African Musicians

Carnival World Music Group

Carnival World Music Group founded by Wyclef Jean raised $25 million to support artists from emerging markets such as Haiti and Africa. The group democratizes the global music marketplace for songwriters and producers in developing regions, whilst contributing to further empower dynamic women-owned businesses in the music industry.

EmPawa Africa

EmPawa is an initiative founded by Mr. Eazi with one simple mission: helping new artists reach their full potential by equipping them with the requisite knowledge and funding. The program selects African artists to receive a non-repayable grant to fund their first professional-quality music videos, marketing services, and support to launch an international recording career. Artists participate in a seven-month mentorship program with mentors such as Ghanaian rapper Sarkodie, Tanzanian music superstar Diamond Platnumz, Afrobeats veteran DJ Neptune, and other artists from the African music industry.

C.R.E.A.M Platform

C.R.E.A.M, a platform created by Dbanj, provides creative minds with the opportunity to upload their ideas, such as recording a song or video, talent branding or marketing, and more by simply dialing a USSD code on a mobile phone. The platform with over 4.6 million subscribers, has led to the discovery of hundreds of talents from the music category alone.

Film

Despite the progress made in Africa's film industry due to the use of digital tools, the output remains weak, which reduces the circulation of these productions outside Africa. Most African producers and filmmakers may have focused their skillset on producing and filmmaking alone, often at the expense of developing business, fundraising, finance, and relationship management skills. Often producers have inadequate specialized skills needed to raise capital from investors and other financiers at the outset of the film development process and skills to negotiate licenses with distributors, sales agents, and broadcasters after completion. This lack of capacity culminates in a negative feedback loop between finance and distribution challenges—the less a filmmaker has of any one factor, the more difficult it becomes to secure any of the others.

Additionally, there are few formal film schools and a lack of training infrastructure on the continent that can continually invest in and develop upcoming talent. This makes mentorship and on-the-job-learning one of the few options through which upcoming talent can acquire skills. According to Brian "Kedi" Kedemi, a Kenyan filmmaker and producer, the few available film schools have outdated equipment that does not equip them with the needed skills to compete on a global level.

It is, therefore, necessary to ensure that not only are film schools available and accessible to upcoming filmmakers, but that they also keep up with continually evolving industry trends.

A survey conducted in 2018 by Goethe Institute and 234 Media, revealed that due to films' long multi-year development cycles, filmmakers often felt that the insights, skills, and relationships built from previous films had often become irrelevant by the time they had a newly completed film to take to the market. The findings have made filmmakers reluctant to develop specialized skills. Filmmakers on the continent need to take skills and capacity development more seriously in order to fully exploit Africa's full film potential.

Fashion

In order for African designers to achieve large-scale profitability, innovation, influence, and efficiency, they need support. There has been growth in accelerators, incubators, co-working spaces, tech hubs, and other types of boot camps for startups and entrepreneurs in Africa that help to build ecosystems around a certain sector. These are referred to as Entrepreneur Support Organizations (ESOs), and on the continent, they are often organized around agri-business, financial technology, e-health, and the like.

While some do exist for the creative sector—notably through AfDB's Fashionomics Africa initiative's masterclasses in Côte d'Ivoire, Ethiopia, Kenya, Nigeria, and South Africa and HEVA Fund in East Africa—they are few and far between. In order to create these at scale, investors, governments (both local and foreign), ESOs, and creatives themselves must collaborate to create and fund these kinds of organizations. The organisations will provide support to entrepreneurs and companies in fashion and other CCIs across a range of business functions - fundraising, operations, talent - and technical skills - size standardization, measurement, and pattern cutting. These organizations can spur the sector's future growth by providing monetary resources and advice to lower barriers and cost to formalization.[9]

Additionally, they might focus on technical collaboration, bringing in experts from houses of brands, textile manufacturers, and fashion houses from other markets, emerging and non-emerging alike. This collaboration could help expose actors in Africa's fashion industries to new opportunities and revenue streams from working as a designer under a major brand to working in industries adjacent to fashion design such as fashion merchandising and buying.

Training designers is especially relevant because beyond design, and production, designers regularly wear many hats in finance and operations, often without an extensive background in these areas.

Further, many creatives in the fashion sector will need support in a post-COVID era as they grapple with income losses due to a shift in spending to necessities like groceries and cooking gas rather than clothing and restrictions on movement that have prohibited business as normal. Creating accelerators and incubators for creative entrepreneurs might provide the time and a "safe-to-fail" space to learn technical and business skills in-depth, while also cultivating a community of like-minded business owners.

3

GLOBAL ACCESS v. LOCAL APPEAL

Africa’s fashion, film, and music industries wrestle with which is more important: generating local appeal for their content or having their products being sold or exported abroad. There is not necessarily a “right” path that all businesses in the creative sector should take. Generating local appeal is relevant for each of these industries, as that is what drives their revenues and generates buzz outside of the country where content comes from alone. For some, global access is far more advanced and brings in important structures around monetization and distribution.

Fashion

The question of global access versus local appeal is a defining question facing African fashion industries today. Globally, many brands achieved domestic popularity before expanding abroad. American brands, for example, flourished after World War II because European brands that American consumers historically preferred were no longer available.[10] American brands developed to cater to different markets and showcase different levels of luxury catering to more than one income group.

The newfound global "sexiness" of Nigerian music serves as a good example of a similar phenomenon currently taking place in Africa in an analogous creative industry. Nigerian music was popular *across* Africa before Western artists started collaborating with Nigerian artists and before most people in other markets started adding it to their Spotify playlists.

Many African fashion brands are luxury, made-to-measure, and geared toward export. While the approach may lead to success for some creatives, their clothing remains inaccessible to many Africans who end up sourcing for clothes from foreign-owned stores to find cheaper alternatives.

Anna Rykova, the former Fashion Director of *Marie Claire Russia* and former Fashion Director of *Cosmopolitan Russia,* shared that in a recent visit to the continent, she asked everyone she encountered if there was an African brand that produced clothes for reasonable prices, would they prefer to buy foreign brands or buy local brands. She noted that everyone said they would buy local and tended to share the same reason: "Because it is ours."

The African fashion sector must chart a path of domestic and regional popularity to pre-empt global access. One potential strategy is for African designers and manufacturers to adopt a "house of brands" approach to create a variety of products under one parent brand that appeal to the mass market.

To harness the "house of brands" opportunity, however, there are several factors that must be resolved: engineering demand, filling unused capacity at factories, creating trust between the brand and consumers, and building out the talent pipeline.

While the politics of *mitumba* complicate most textile and apparel manufacturing in Africa, there is still demand for locally-made, mass-produced articles of clothing, like uniforms for school children, law enforcement, military, and medical professionals. At the same time, African factories are not at 100% utilization.

Fashion

In South Africa, Sub-Saharan Africa's most developed country, average factory utilization was just below 80% at the beginning of 2020; in Kenya, East Africa's leading economy, factories struggle with the same challenge. With so many intersecting issues, a question that arises is: What kind of industrial transformation is needed for the African fashion sector to perform optimally?

Botho's analysis indicates that a number of steps must be taken. First, designers need to be up-skilled and trained on the business elements of the fashion industry. Second, textile and apparel factories need to fill their remaining utilization capacity to produce the needed supply. Lastly, governments must ensure the expansion of access to finance for designers. This kind of industrial transformation cannot happen overnight. Instead, it will require collaborative effort between actors in the fashion sector, from governments to financial institutions.

If the AfCFTA is robustly operationalized at the national and regional level, the agreement can help harmonize rules of origin, standards, tariff and non-tariff barriers and offer continent-wide protections for the fashion and textile and apparel sector to support the growth of homegrown brands and reduce the dependence on imported used clothing.

Intra-African efforts to promote the fashion sector under the AfCFTA could also allow different countries to specialize in different tiers of clothing. Armed with knowledge on African consumer preferences, designers might be better able to target markets for expansion and adapt their product offering based on local style and sizing, for example.

When these brands attract heightened regional or global attention, they will achieve economies of scale attracting a large clientele, thereby facilitating more access to the global market.[11]

Fashion & Design in Senegal

Senegal may not be known as a destination for mass clothing manufacturing, but it is rapidly emerging as one of the design capitals of the world. According to Safietou Seck, a Senegalese designer, mental health advocate, and owner of high-end brand Sarayaa, Senegal already has a reputation as a fashion hub, with a strong culture of handweaving, wide availability of inputs, and tailors at almost every corner. However, the government historically has lacked a strong vision and conviction of what they want the Senegalese fashion industry to become, which has led to poor results for people across the fashion value chain in Senegal.[12]

The good news is Senegalese fashion designers are already pushing the envelope and getting noticed for it. Safietou Seck has created a luxury brand that she credits with giving her a sense of purpose when she was experiencing depression. An economist by training, Safietou had dreams of working in fashion since she was young. After graduating with her MBA, she opened a small boutique in the Georgetown neighborhood of Washington, D.C., where she worked with different designers and received a great response from her customers. A variety of factors led her back home to Senegal, where she had planned to start her own brand and store. However, she decided to start working at the United States Embassy in Dakar after societal pressures that told her fashion was not a “viable career”.

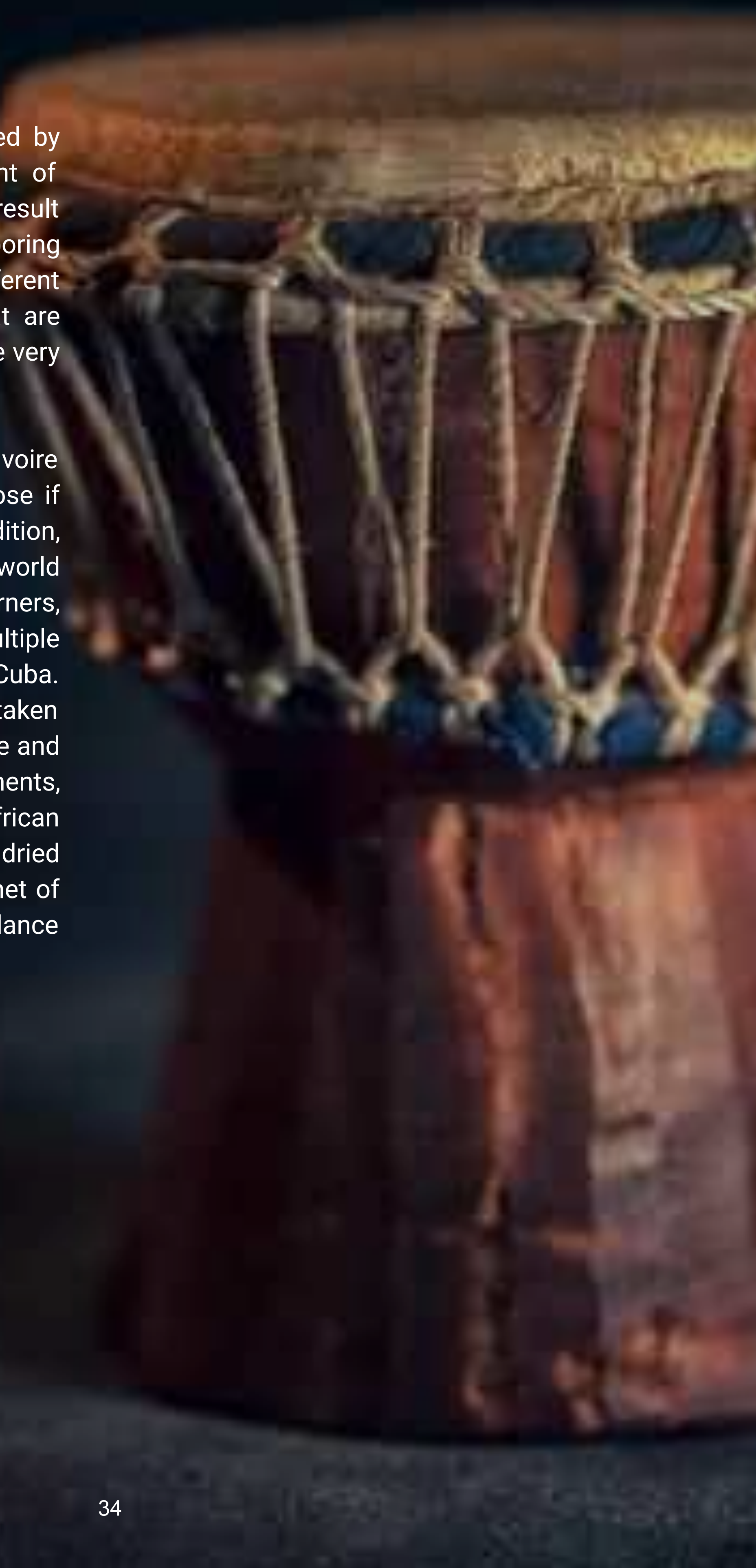
During Seck’s preparations for President Obama and First Lady Michelle Obama’s state visit to Dakar in 2014, a woman from the presidential team, upon learning that she had made her outfit, said that the First Lady would have loved to have her dress. That was the impetus for Safietou to launch her career in fashion, and just 7 months later she opened Sarayaa.

She hosted a show for her brand with over 500 attendees and started to gain recognition on social media for her brand’s representation of women, being high-end, and what Seck calls tradi-modern (a mix of traditional fabrics with modern cuts). After American actress Teyonah Parris, who has starred on Mad Men and Empire, posted on Instagram in designs from Sarayaa, Seck said demand blew up. Seck now sells her designs, which proudly feature Senegalese handweaving, to women around the world from Nairobi to Paris to Atlanta through private sales and shows.

Safietou is joined by the likes of Selly Raby Kane and Adama Ndiaye who have a number of accolades. Kane was featured in TIME’s Next Generational Leaders in 2019 and has dressed celebrities like Beyoncé, Teyana Taylor, and Iman. She was among the first African artists ever to collaborate with IKEA through their limited collection ÖVERALLT, launched in 2019 at Design Indaba. For the collection, which features 10 designers from across the continent, Kane created a basket inspired by African hair braiding rituals.

Adama Ndiaye, the creator of the Adama Paris label, Black Fashion Week, and Dakar Fashion Week, shows similar success. Ndiaye created Black Fashion Week to promote African fashion designers and models and has taken the event to major cities in Europe, Canada, and Asia. In interviews with Deutsche Walle and Vogue, Ndiaye has emphasized the power of events like Dakar Fashion Week in showing the dynamism of the African textile industry and allowing African designers to tell their own stories, rather than trying to replicate other major fashion events around the world.

Traces of African Music Can Be Found Around the World



Music in Africa was heavily influenced by migration patterns and the movement of foreigners across the continent. The result of this was that while neighboring communities may have starkly different music styles, some communities that are located quite far from each other share very similar traits.

For instance, communities in Côte d'Ivoire and those in Eastern Angola have close if not identical singing styles. In addition, Africans moving around the world transported their music to various corners, the traces of which can be found in multiple disparate countries, from Brazil to Cuba. Over 1.3 million African slaves were taken to Cuba carrying with them their culture and music, African rhythms, and instruments, such as the Shekere - a West African handmade rattle which consists of a dried gourd, covered on the outside with a net of shells or seeds - which is played in dance music and Cuban jazz.

Music

Although there are many initiatives by Africans to support the continent's music industry, foreign entities have traditionally dominated Africa's music landscape with companies such as Universal Music Group and SONY Entertainment expanding across the continent.[13] Universal has made strategic moves across the continent since its launch in Johannesburg in 2017.

Universal has a branch in Abidjan to manage the West African region, and in 2018 it bought AI Records, one of East Africa's biggest labels.

In the same year, the group launched the label Universal Music Nigeria, which has recently signed deals with musicians such as Banku singer Mr. Eazi, Tekno, and Vanessa Mdee, Universal Music Nigeria has also indicated that it intends to build its second fully functional studio in Nigeria to support the growth of the music industry in West Africa. Just recently, in January 2020, the group signed a deal with Kenya's largest music band, Sauti Sol, further expanding its footprint on the continent.

SONY is at the forefront of expansion and partnerships in Africa. Adopting a unique approach, the company has capitalized on partnerships with telcos and mobile carriers to appeal to consumers in pre-paid markets with limited disposable income. SONY entered the African market by opening its first offices in South Africa before expanding into Kenya and Nigeria. SONY has also signed Nigerian artists D'banj and Davido and Tanzania's Rose Muhando, among others.

Warner Music Group (WMG), one of the world's top record labels, is also among the players capitalizing on the opportunities in Africa's music industry. In early 2019, Warner closed a deal with Nigeria's music label Chocolate City, which has signed artists such as Femi Kuti, son of Fela Kuti. In April 2020, WMG invested in Africori - a distribution and rights management and artists development firm. The deal gives WMG access to over 6,500 of Africori's artists. As part of the deal between WMG and Africori, WMG will support the distribution of music from African artists such as Master KG, Sho Madjozi, Nyashinski, and more.

Music

Tidal, a music platform owned by JAY-Z, recently formed a partnership with Africa's largest mobile company MTN. The deal formally launched in Uganda in August 2018, sharing ambitions with its fellow labels SONY and WMG to showcase African performers. In future, Tidal plans to expand to Nigeria, chosen due to its sizeable youth population.

The influx of international music organizations on the continent raises the question of whether African artists should prioritize global access or work to appeal to more consumers locally. Botho interviews with experts revealed that many artists prefer working with international organizations because of the labels' robust monetization structures, which allows artists to generate more income from their music.[14]

Reports also show that the foreign Digital Service Providers (DSPs) dominating the African market are skewed in favour of foreign music. These reports also indicate that around only 20% of the content generated is local while 80% is foreign.

One could argue that African artists should work with foreign DSPs due to their global reach, however, local DSPs are equally important due to their understanding of the African market and local repertoire.

African DSPs have more local knowledge of networks and players and can leverage local payment options that foreign DSPs may not be as able to easily integrate into their platforms.

Increased investment in African DSPs will promote the visibility of African music.[15] A balance must, therefore, be achieved between promoting 'African' DSPs and listing African music on platforms that have a greater global reach. Using a balanced approach - artists can leverage the accessibility of local DSPs and the wider reach that many foreign DSPs have.

Film

African filmmakers often find it challenging to effectively reach audiences at scale, yet the region's population is a highly under-tapped market for filmmakers. Africa currently has a population of 1.22 billion people, which is expected to increase to 1.68 billion people by 2030. Successfully developing consumer demand for African-produced film can drive future economic growth and generate jobs while accelerating the visibility of African stories on the global stage.

We can draw lessons from emerging markets such as India, which grew the local market before trying to conquer international markets.

India's film industry, considered one of the most prolific globally, has only 10% of the content being consumed in English or other non-Indian languages. Now, movies from India's Bollywood are consumed globally, with some countries adapting them to their own local languages. African filmmakers and other stakeholders should work together on the quality and scale of distribution and marketing resources to bridge the gap between creatives and their local consumers.

Conclusion

As Senegalese designer Safietou Seck stated, "You cannot develop a country out of copying and pasting whatever is happening outside. We [Africans] have to specialize in what we do best."[16]

Technology to break down barriers to access, collaboration to promote upskilling of current and potential creatives, and striking a balance between global access and local appeal will be the defining factors that empower Africa's music, film, and fashion industries to specialize in what they each do best.

The time is now for governments, investors, non-profits, and creatives alike to co-create and drive forward collective, aspirational visions of what these industries across the continent can become, especially in a post-COVID-19 world: sources of national pride, global hubs for events and tourism, and a driver of Africa's growing global cultural influence.

Endnotes

1. Khati, Thabiso. CEO, The T-Effect, previously Director at Universal Music Group. Personal interview. 14 April 2020.
2. Tega Oghenejobo, COO, Mavin Records, Personal interview. 13 May 2020.
3. Mageria, Mwaniki. CEO, Riverwood. Personal interview. 27 May 2020.
4. Gachara, George. Managing Partner at HEVA Fund, which finances East Africa's creative economy. Personal interview. 14 May 2020.
5. Khati, Thabiso. CEO, The T-Effect, previously Director, Universal Music Group. Personal interview. 14 April 2020.
6. Oladehin, Olakunle. Founder, MePlaylist. Personal interview. 7 May 2020.
7. Gachara, George. Managing Partner, HEVA Fund, which finances East Africa's creative economy. Personal interview. 14 May 2020; Tesha, Antoinette. Industry Director - Textiles & Apparel, Msingi. Personal interview. 2 April 2020.
8. Gachara, George. Managing Partner, HEVA Fund, which finances East Africa's creative economy. Personal interview. 14 May 2020; Odongo, Akinyi, Chair, Kenya Fashion Council. Personal interview. 14 April 2020.
9. Gachara, George. Managing Partner, HEVA Fund, which finances East Africa's creative economy. Personal Interview. 14 May 2020; Gregorio, Emanuela. Africa Coordinator, Fashionomics Africa, African Development Bank. Personal interview. 17 April 2020.
10. Rykova, Anna. International fashion editor, stylist and creative consultant. Former Fashion Director of Marie Claire Russia and Fashion Director of Cosmopolitan Russia. Personal interview. 12 May 2020.
11. Rykova, Anna. International fashion editor, stylist and creative consultant. Former Fashion Director of Marie Claire Russia and Fashion Director of Cosmopolitan Russia. Personal interview. Personal interview. 12 May 2020
12. Seck, Safietou. Owner, Sarayaa, a Senegalese fashion brand. Personal interview. 4 May 2020.
13. Olaosun, Demilade. Lead Solicitor, RBMM Solicitors. Personal Interview. 4 May 2020; Oghenejobo, Tega. Personal interview. 13 May 2020.
14. Olaosun, Demilade. Lead Solicitor, RBMM Solicitors. Personal interview. 4 May 2020
15. Olakunle Oladehin. Founder, MePlaylist. Personal interview. 7 May 2020.
16. Seck, Safietou. Owner, Sarayaa, a Senegalese fashion brand. Personal interview. 4 May 2020.

About Botho Emerging Markets Group

Emerging markets are home to 85% of the world's population — and us.

Botho is a leading investment advisory and strategy consulting firm working on redefining and redirecting Africa's position among emerging markets.

For over a decade, Botho Emerging Markets Group has been a leader in guiding Fortune 500 companies, governments, development institutions, small businesses, and nonprofits in navigating the world's fastest growing markets.

We are entrepreneurs and investors, thought leaders and scholars. Creatives and innovators connecting capital, catalysing conversations, and creating opportunities to implement solutions to complex global problems. We are guided by a common set of values: curiosity, collaboration, and impact.

What we learn from collaborating closely with SMEs and multinational companies as well as government and international organisations, we share to advance a more sustainable, inclusive world.

Botho Advisory Services

Botho offers strategic advice to the public and private sector that build partnerships across the Global South to accelerate private sector development. As Asia, Latin America, the Middle East and Africa increase their share of global growth, we help governments and businesses navigate changing economic, social, and policy environments. Our tailored expert analysis enables our clients to engage more effectively with key stakeholders, and identify international effective tools that support strategic priorities.

Our Offices

KENYA
The Promenade Building, 5th Floor
General Mathenge Drive
P.O.Box 49393-00100,
Nairobi, Kenya
Tel: +254 724 965905
Email: info@botholtd.com

UAE
Jumeirah Business Center 5
Suite 2401
Dubai,
United Arab Emirates
Tel: +97144372499
Email: info@botholtd.com

For enquiries, please email:
info@botholtd.com

Website: www.bothogroup.com