

Train for Trade II

EU-UNCTAD joint Programme for Angola



Creative
Industries



Mapping the cultural and creative industries in Angola

National workshop on Angola's cultural and creative industries mapping and strategy
30 January – 2 February 2023, Luanda, Angola

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Background





Creative economy component

Objective: to increase the economic potential of cultural and creative industries in Angola for employment, trade and development gains

The component directly contributed to the implementation of Program 1.7.2: “Promotion of Cultural and Creative Arts and Industries” of the National Development Plan of Angola 2018-2022.

It also contributes to the United Nations Sustainable Development Goals:

- Goal 8 - Decent work and economic growth
- Goal 9 - Industry, innovation, and infrastructure
- Goal 11 - sustainable cities and communities



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Creative economy component

Four documents produced

- Mapping the cultural and creative industries in Angola (report)
- Action plan
- Cultural and creative tourism (technical note)
- The international dimension of the CCIs in Angola: image, export, and investment (technical note)

Six online trainings and one face-to-face workshop

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Creative economy component

National conversation on Angola's creative economy with government authorities

October 2020

Online course on governance of the cultural and creative industries

July-August 2021

Online course on international dimensions of the cultural and creative sectors: Culture, diplomacy, and branding

October-November 2021

National workshop on cultural and creative industries mapping and strategy

January 2023



October 2020

National conversation on Angola's creative economy with private sector

September 2021

Online course on cultural and creative entrepreneurship and exports

November 2021 – January 2022

Online course on cultural and creative tourism



Workshop planning

	Day 1 Monday Public sector	Day 2 Tuesday Private sector	Day 3 Wednesday Public and private sector
9:00-13:00	Presentation of the report on report on “Mapping the cultural and creative industries in Angola” followed by Q&A	Presentation of the report on report on “Mapping the cultural and creative industries in Angola” followed by Q&A	<p>Summary of Day 1 and Day 2 activities</p> <p>Validation of findings and recommendations of the mapping report followed by interactive activities</p>
13:00-14:00	Lunch break	Lunch break	Lunch break
14:00-18:00	Introduction to formulating Angola’s Cultural and Creative Industries Strategy followed by Q&A and interactive activities	Introduction to formulating Angola’s Cultural and Creative Industries Strategy followed by Q&A and interactive activities	<p>Interactive activities</p> <p>Wrap up</p>

Methodology



Methodology of the mapping report

Desktop research

- Review of official documents, strategic plans, statistical maps, and government reports
- Data collection from National Institute of Statistics and international databases

Online surveys

Interviews

- Government: 20 interviewees
- International institutions: 3 interviewees
- Private sector and civil society: 37 interviewees

Cultural and creative industries (CCIs)



Definition of cultural and creative industries

Evolving concept, no single definition

UNCTAD defines creative industries as

cycles of creating, producing, and distributing goods and services that use creativity and intellectual capital as primary inputs. They comprise a set of knowledge-based activities that produce tangible goods and intangible intellectual or artistic services with creative content, economic value, and market objectives.

Heritage	Arts	Media	Functional creations
<ul style="list-style-type: none">• Traditional cultural expressions: arts and crafts, festivals and celebrations• Cultural sites: archaeological sites, museums, libraries, exhibitions, etc.	<ul style="list-style-type: none">• Visual arts: painting, sculpture, photography and antiques• Performing arts: live music, theatre, dance, opera, circus, puppetry, etc.	<ul style="list-style-type: none">• Publishing and printed media: books, press and other publications• Audiovisuals: film, television, radio and other broadcasting	<ul style="list-style-type: none">• Design: interior, graphic, fashion, jewellery, toys• New media: software, video games, and digitalized creative content• Creative services: architectural, advertising, cultural and recreational, creative research and development (R&D), digital and other related creative services

Measuring cultural and creative industries

Measuring CCIs can help governments and policymakers for planning and implementing policies targeting CCIs

Several measurement options exist and most often they look at

- Productive activities (contribution to gross domestic product (GDP) or value added)
- Characteristics of cultural and creative enterprises (i.e., revenues or market size)
- Employment in cultural and creative industries
- International trade in cultural and creative goods and services

Global indicators

- CCIs generate around 3.1% of global GDP
- CCIs provide nearly 50 million jobs worldwide
- Creative goods represent 3% of global merchandise trade (US\$ 524 billion in 2020)
- Creative services represent 21.4% of global services trade (US\$ 1.1 trillion in 2020)

Cultural and creative industries in Angola



Cultural and creative industries in Angola

Angola has **no official definition, taxonomy or classifications** that could reflect the Angolan reality and a national vision for Angola's CCI

Surveys and interviews show:

- Developing sense of **interconnection between culture and creative industries** as an economic sector
- “Culture” / “cultural industries” / “creative economy” are often used interchangeably
- **Main constraints** in the sector:
 - Lack of public recognition of CCIs
 - Lack of access to credit
 - Informality
 - Lack of sufficient government support

Result of survey question: Which sectors can be considered as part of cultural and creative industries?

Sector	Yes	No	Doesn't know
Heritage and traditional popular culture	19	0	0
Performing arts, music, and celebration	19	0	0
Audio-visuals and digital creative content	19	0	0
Visual arts and crafts	18	1	0
Design, fashion, and creative services	17	1	1
Book, literature, and press	17	1	1
Information and communication technologies and R&D	15	1	3
Trade	14	2	3
Health and education	10	6	3
Construction	9	5	5
Public institutions	9	2	8
Agriculture and fishery	8	7	4
Mining	7	9	3

Source: UNCTAD survey among Angolan CCI stakeholders

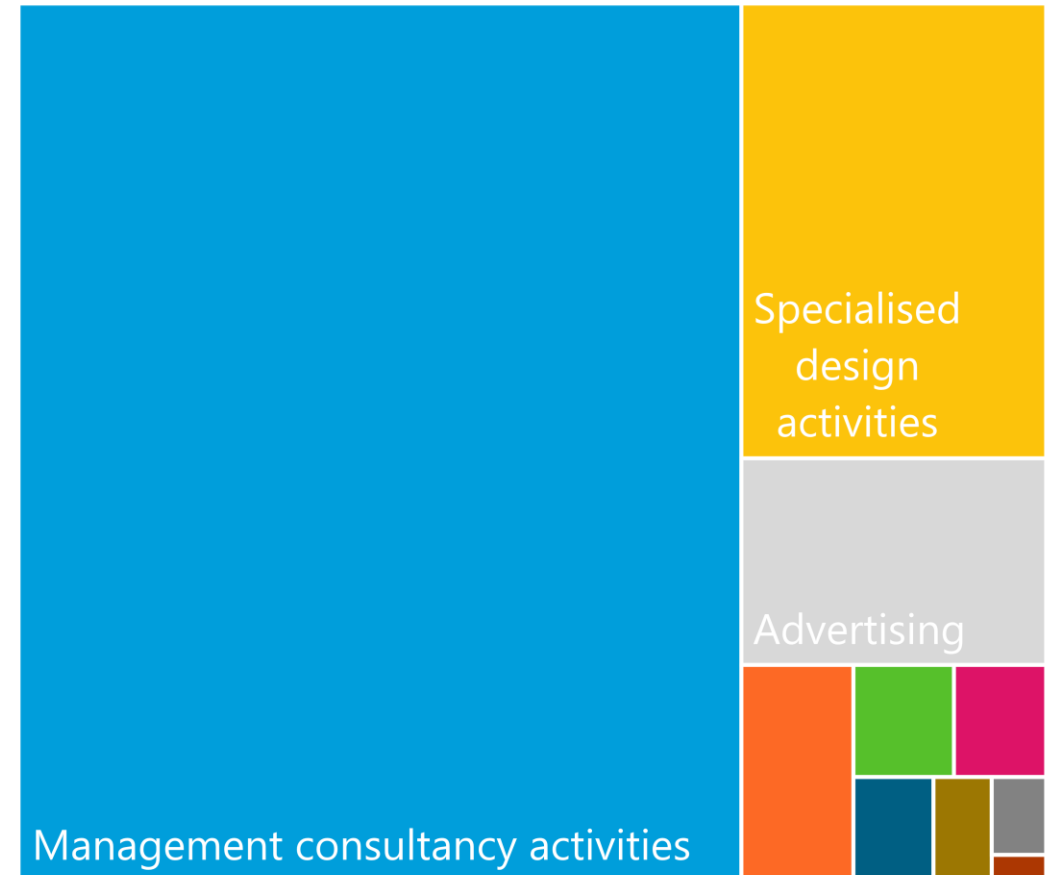
Socio-economic contribution of CCIs

Available quantitative and qualitative information

- Contribution to GDP or GVA: not available
- Contribution to employment: not available
- Turnover of enterprises by industry: available
- Total number of firms by industry: available
- Exports and imports of creative goods: available
- Exports and imports of creative services: aggregate data
- Public budget and spending: available
- Access to electricity and the Internet: available
- Students involved in CCIs-related tertiary education: available
- Innovation indicators: available
- UNCTAD CCI stakeholder survey

Turnover of firms in cultural and creative industries

Subsectors (CCI)	Values in Kz	Values in US\$
Management consultancy activities	234,858,126,408	466,275,142
Specialised design activities	51,372,282,161	101,991,864
Advertising	23,340,644,056	46,339,304
Architectural and engineering activities	8,951,584,425	17,772,011
Computer programming	4,177,402,015	8,293,597
Other activities related with information technologies	3,834,810,322	7,613,434
Computer consultancy activities	3,073,987,825	6,102,936
Other consulting activities	2,224,914,733	4,417,230
Software publishing	1,575,486,930	3,127,890
Publishing of newspapers, journals and periodicals	154,349,188	306,437
Photographic activities	141,620,048	281,165
Creative arts and entertainment activities	120,333,651	238,904
Cultural education	54,130,690	107,468
Sound recording and music publishing activities	35,297,486	70,078
Other publishing activities	5,494,941	10,909
Retail sale of music and video recordings in specialised stores	4,421,050	8,777
Motion picture, video and television programme production activities	3,810,302	7,565



Source: based on data from the National Institute of Statistics

Number of firms in cultural and creative industries

Subsectors (CCI)	Number of firms
Specialised design activities	153
Management consultancy activities	97
Other consulting activities	86
Other activities related with information technologies	33
Computer consultancy activities	24
Architectural and engineering activities and related technical consulting	13
Advertising	12
Computer programming activities	7
Photographic activities	7
Creative arts and entertainment activities	7
Sound recording and music publishing activities	6
Publishing of newspapers, journals and periodicals	4
Retail sale of music and video recordings in specialised stores	1
Other publishing activities	1
Software publishing	1
Motion picture, video and television programme production activities	1
Motion picture, video and television programme post-production	1
Research and development in human and social science	1
Cultural education	1

Source: based on data from the National Institute of Statistics

Exports and imports of creative goods and services

Angola is a commodity-dependent country

- 94% of exports are oil-related

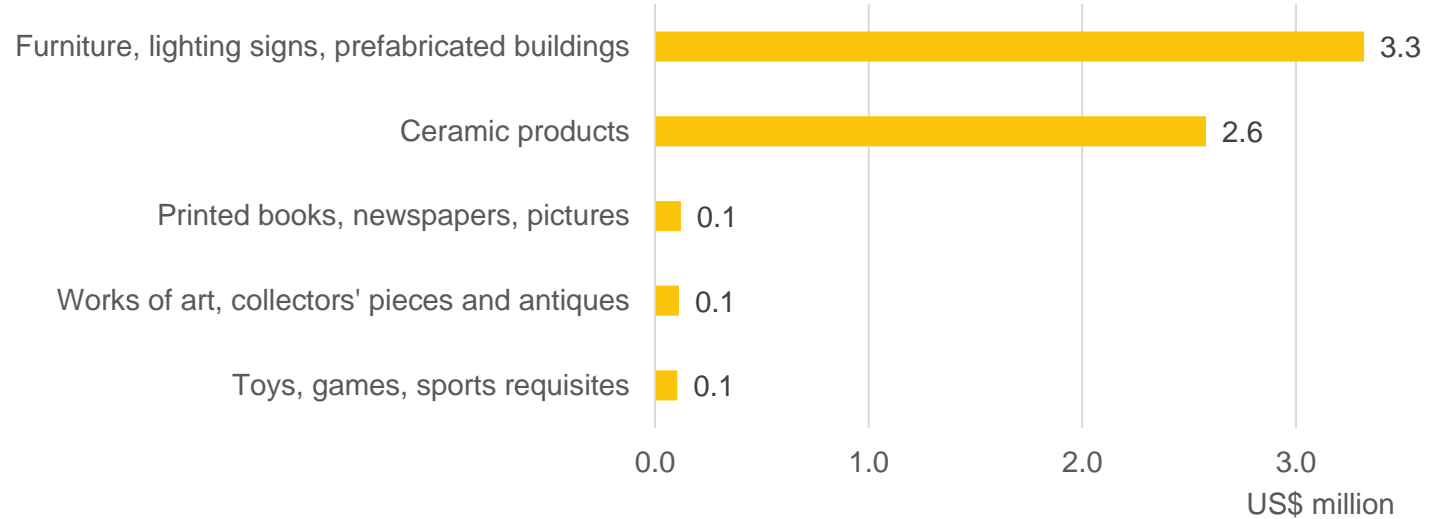
Angola is a net importer of creative goods

- Creative goods exports
 - US\$ 6.3 million / 0.02% of total exports
- Creative goods imports
 - US\$ 326.1 million / 2.84% of total imports

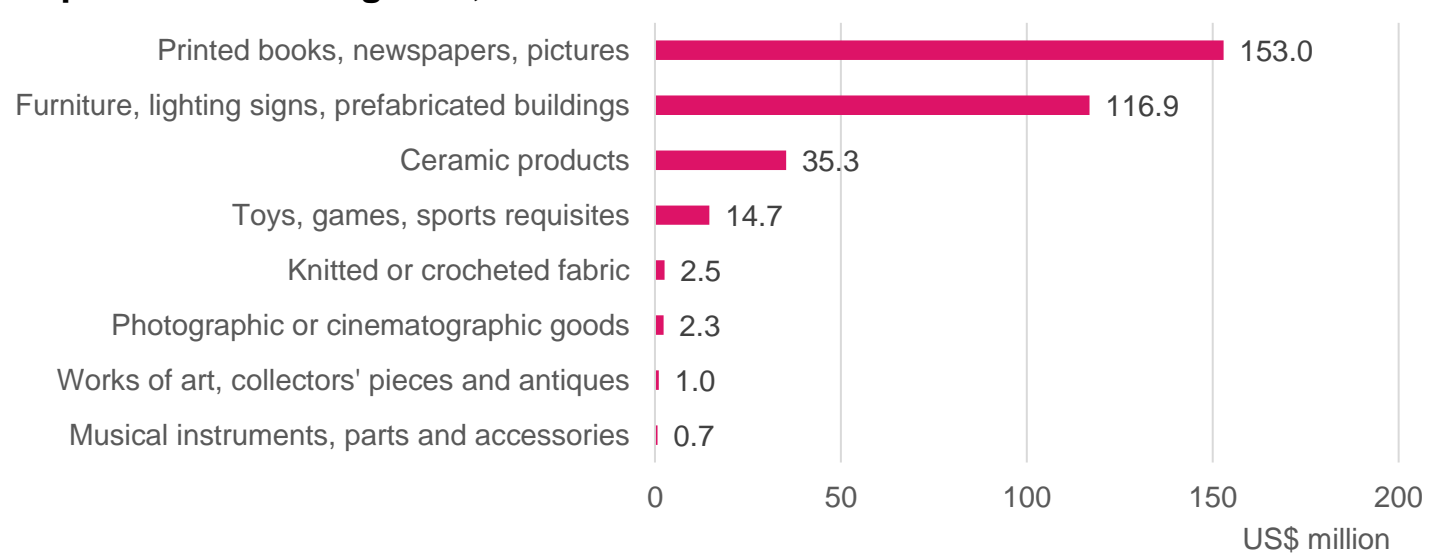
Angola is also a net importer of creative services

- Creative services exports: US\$ 0.2 million
- Creative services imports: US\$ 48 million

Exports of creative goods, 2021



Imports of creative goods, 2021



Source: based on data from the Trading Economics

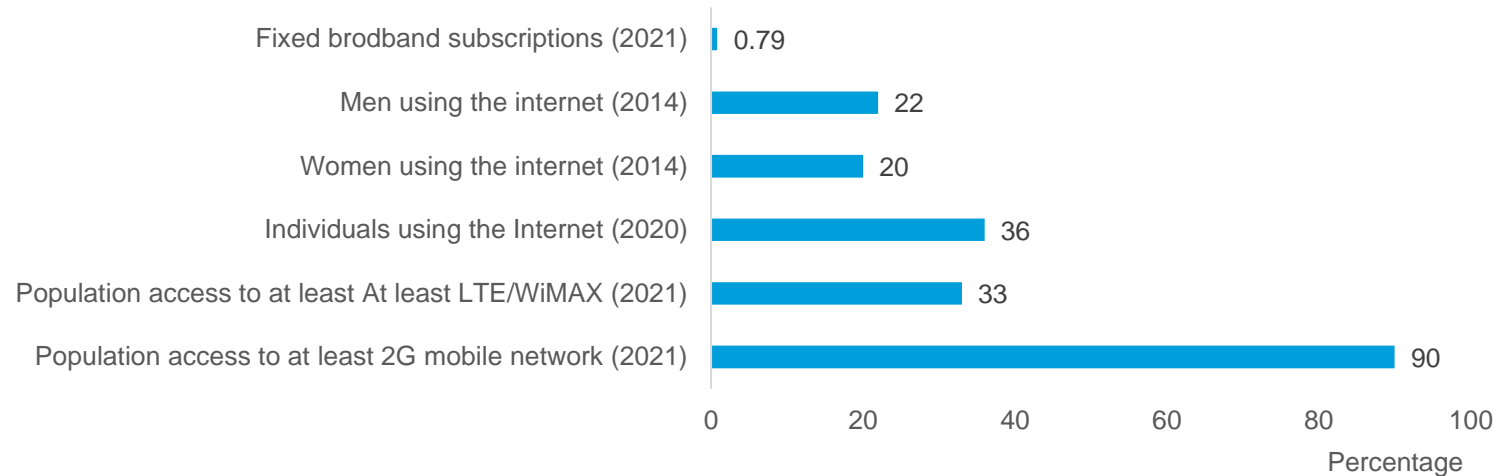
Public spending on culture

Expenditure by Function	Value in kwanza	Value in US\$	Percentage share
General Public Services	1 769 262 339 657	3 187 974 953	12.0%
Defense	627 168 085 825	1 130 073 310	4.2%
Security and Public Order	708 963 283 397	1 277 457 356	4.8%
Education	1 023 078 253 870	1 843 450 672	6.9%
Health	851 110 353 685	1 533 587 433	5.8%
Social Protection	561 052 124 429	1 010 941 159	3.8%
Housing and Community Services	314 340 085 240	566 398 943	2.1%
Recreation, Culture and Religion, out of which:	45 456 965 989	81 907 395	0.3%
Cultural Services	8 820 641 414	15 893 620	
Recreational and Sports Services	10 315 407 092	18 586 989	
Religious and Other Community Services	77 080 000	138 888	
Broadcast and Publishing Services	26 208 958 184	47 225 050	
Research and Development in Recreation, Culture and Religion	34 879 299	62 848	
Economic Affairs	1 078 620 334 788	1 943 530 100	7.3%
Environmental Protection	10 485 821 383	18 894 053	0.1%
Public Debt Operations	7 795 663 317 562	14 046 746 401	52.7%
GSB General Total	14 785 200 965 825	26 640 961 775	100%

Source: Ministry of Finance of Angola

Access to electricity and the Internet

Province	Access to electricity (%)
Bengo	50
Benguela	37
Bié	22
Cabinda	53
Kuando Kubango	32
Cunene	20
Huambo	33
Huíla	29
Kwanza Norte	57
Kwanza Sul	24
Luanda (Capital)	100
Lunda Norte	64
Lunda Sul	28
Malange	25
Moxico	23
Namibe	60
Uíge	23
Záire	28

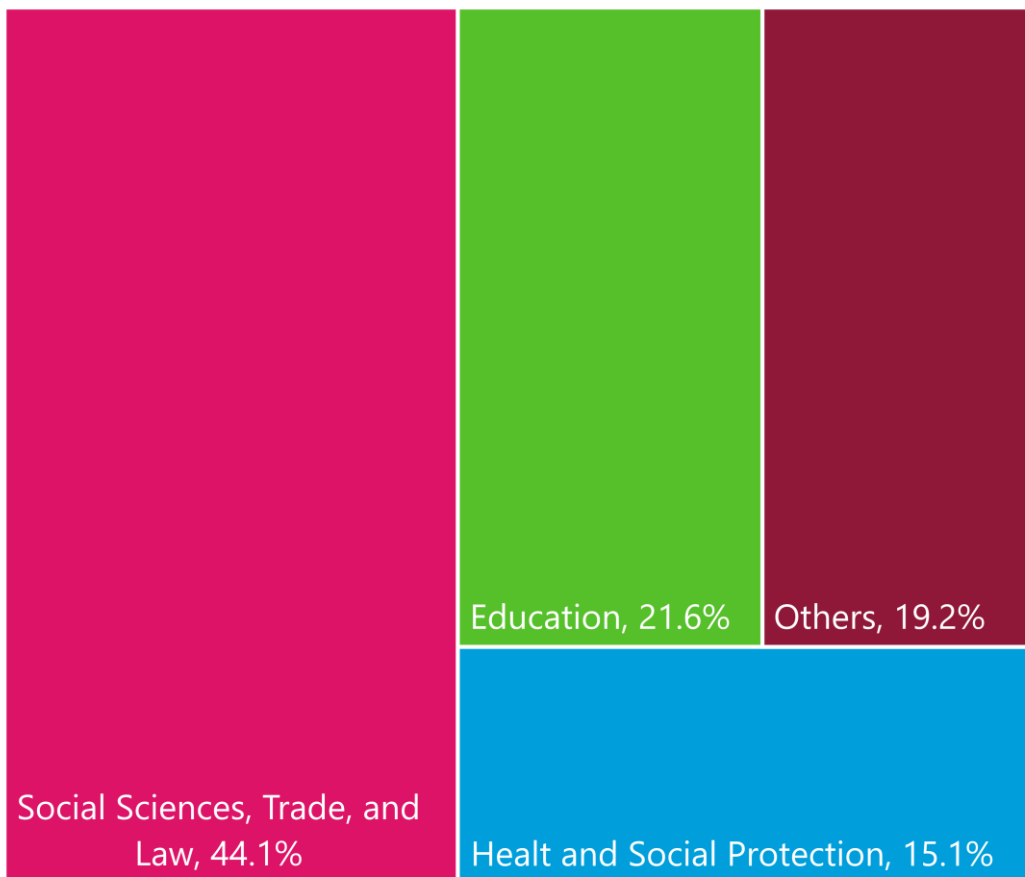


Source: International Telecommunication Union

Source: based on the National Plan for Energy and Water Action Plan: 2018-2022

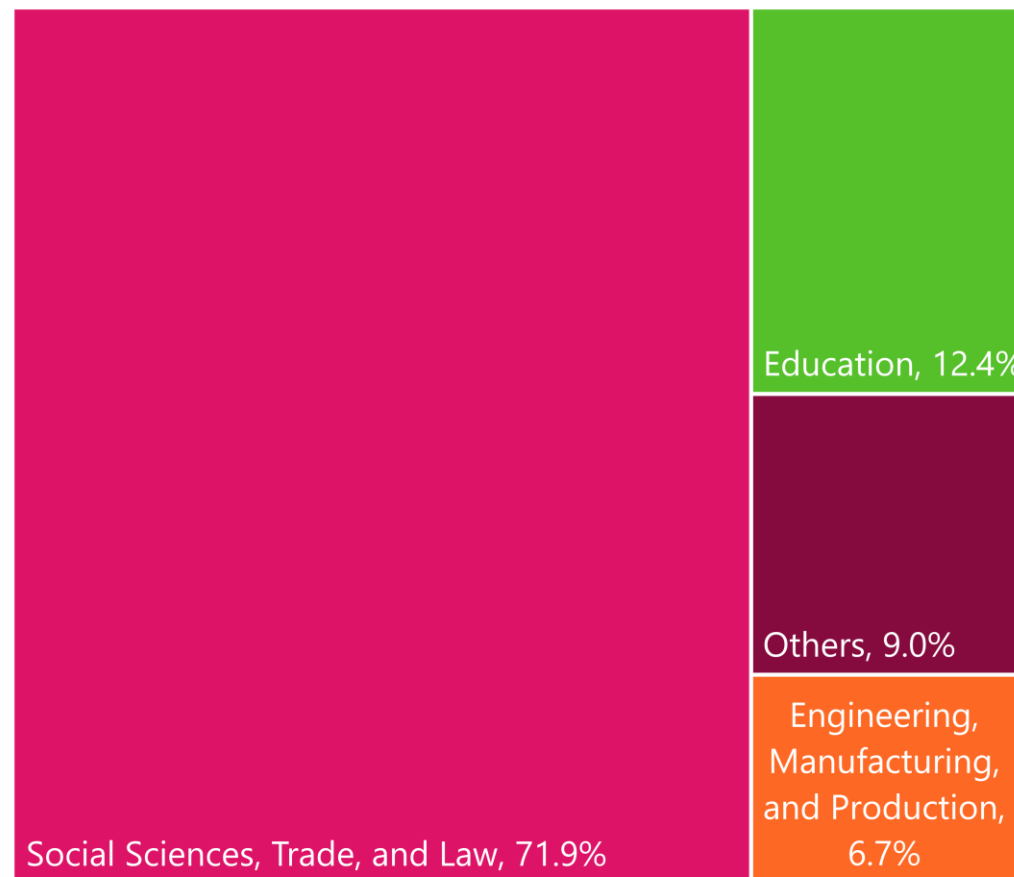
Enrolment in CCI-related tertiary education

Students enrolled in undergrad studies



Source: based on data from Ministry of Higher Education and Innovation

Students enrolled in post-grad studies



Source: based on data from Ministry of Higher Education and Innovation

Innovation indicators

Indicators	Rank (out of 132 countries)
Knowledge creation	132
Patents by origin/bn PPP\$ GDP	129
PCT patents by origin/bn PPP\$ GDP	97
Utility models by origin/bn PPP\$ GDP	67
Scientific and technical articles/bn PPP\$ GDP	131
Citable documents H-index	130
Knowledge impact	127
Labor productivity growth, %	117
ISO 9001 quality certificates/bn PPP\$ GDP	120
High-tech manufacturing, %	107
Knowledge diffusion	125
Intellectual property receipts, % total trade	95
Production and export complexity	117
High-tech exports, % total trade	100
ICT services exports, % total trade	131
Creative outputs	92
Creative goods exports, % total trade	127

Source: based on data from WIPO's Global Innovation Index 2022

Cultural and creative industries in Angola's public policies

Ministerial structure

Policies



Ministerial structure for CCIs

Cultural and creative activities are markedly dependent on the State

Policies targeting CCIs are centralized at ministerial level

Frequent institutional changes impacting the portfolio

- Until April 2020: Ministry of Culture
- 2020-2022: Ministry of Culture, Tourism and Environment
- Since September 2022: Ministry of Culture and Tourism

Policies relating to CCI sector are coordinated by the National Institute of Cultural and Creative Industries



Institutions under the Ministry of Culture and Tourism

National Historical Archive

Professional Training Center Library

National Library of Angola

Óscar Ribas Museum House

National Institute for Religious Affairs (INAR)

National Institute of Cultural Heritage (INPC)

Institute of National Languages

National Book and Disk Institute

National Institute of Cultural and Creative Industries (INICC)

Angolan Institute of Film, Audiovisual and Multimedia

Art School Complex (CEARTE)

National Museum of Slavery

National Museum of Anthropology

National Museum of Archaeology

National Museum of Natural History

Huíla Regional Museum

Cabinda Regional Museum

Dundo Regional Museum

Policies analysed

Cultural Policy

- Presidential Decree No. 15/11, expired in 2021
- Gives the general framework for measures focusing on CCIs
- Need for a reformulated cross-cutting policy, which mobilizes ministries transversally
- Need to make Cultural Policy a living tool

Industrial Property Law

- Presidential Decree No. 3/92
- Protects brands, establishment names, logos, patents, industrial models and designs
- Implemented by the Angolan Institute of Industrial Property

General context
Content

Main constraints
Recommendations

Patronage Law

- Presidential Decree No. 8/12
- Presidential Decree No. 195/15 regulates the law
- Presidential Decree No. 53/19 amends it
- Establishes the legal regime of tax incentives and donations
- Lack of transparency and clarity on procedures
- High level of bureaucracy

Copyright and Related Rights Law

- Presidential Decree No. 15/14
- Presidential Decree No. 184/2019 established the National Service for Copyright and Related Rights
- Establishes legal regime for copyright and related rights
- Regulates the rights and mechanisms of protection, providing a set of prohibitions or restrictions
- Awareness, knowledge and application of intellectual property rights remains scarce

Industry analysis



CCIs analysed

Context

Education, training, research

Recommendations:
Transversal
Public sector
Private sector

1. Music
2. Cinema, audiovisual and digital media
3. Video games, startups, technology, and innovation
4. Performing arts (theater and dance)
5. Architecture, design, crafts, and fashion
6. Visual arts (photography, painting and installation, sculpture)
7. literature and publishing
8. Museums
9. Celebrations (including carnivals), gastronomy, and cultural and creative tourism (technical notes)

Creation and
production

Distribution, display, consumption

STRENGTHS

1. Angola has a rich portfolio of cultural and creative expressions, especially intangible ones
2. Dynamic cultural and creative industries
3. Diaspora as ambassador of the country and contributing to country branding
4. Angola has a young population
5. New generation of creative entrepreneurs
6. Language connections
7. Consumer markets of Portuguese-speaking African countries
8. Angolans have a good reputation for being cheerful, creative, and inventive people
9. Festivals and popular festivals
10. Political transition and favorable constitutional context since the Luena Treaty in 2002

OPPORTUNITIES

1. Culture Policy Review in 2021
2. Participation in international programs: such as UNCTAD Train for Trade II
3. Train for Trade II is an opportunity to understand CCIs more transversally
4. Events like the International Year of Creative Economy for Sustainable Development in 2021 as a bridge to raise awareness and legitimize the sector before Angolan society
5. Train for Trade II as an opportunity for Angola to make its CCI more visible
6. Willingness of CCIs to collaborate
7. Political will to collaborate with the sector
8. Proximity of State Secretariats that make up the Ministry of Culture and Tourism
9. Coordination, encouragement, and channeling of investment
10. Linking cultural and creative talent to the educational system

WEAKNESSES

1. Angola has a reduced list of world cultural heritage
2. Underestimation of the sector
3. Non-existence of an official taxonomy and classification
4. Lack of a cross-cutting vision to promote CCIs
5. Some CCIs have an incipient potential but do not have the proper support
6. Angola's young population has inadequate access to the Internet
7. Absence of an efficient tax system and incentive policies
8. Lack of copyright enforcement and a culture of piracy
9. Infrastructure degradation
10. Complex and inert governance structure

THREATS

1. Main import and export trading partners
2. Legislation framework, funding regulations and incentives
3. Low efficiency of public institutions in charge of CCI makes it difficult to strengthen CCIs
4. Insufficient connection between the public institutions in charge of CCI and the private sector
5. Low level of formality and no government effort to formalize CCI professionals
6. Lack of attractiveness and structure for cultural tourism drives away tourists and the public
7. Brain drain and lack of intellectual property registrations
8. Low level of interest from private investors
9. Lack of mature enterprises to receive investments
10. Low investment in digital infrastructure

Way forward



Major areas where intervention is needed

1. Coordination and management
2. Taxonomy
3. Statistics
4. Legislation
5. Intellectual property
6. Physical infrastructure
7. Digital infrastructure
8. Training
9. Financing
10. Brand and image



Recommendations

Support

- Reach common understanding about the relevance of CCIs by also involving private sector and civil society
- Develop a policy and regulation framework covering aspects related to CCI, such as their classification, monitoring, evaluation, copyright and patronage incentives

Measure

- Improve data about CCIs to present their socio-economic contribution and as a tool to increase public awareness

Empower

- Promote education and training in CCI-related fields, including in complementary areas like entrepreneurship, management, marketing, promotion
- Improve physical and digital infrastructure, especially access to quality and affordable Internet

Innovate

- Improve digital infrastructure access for CCI practitioners
- Link traditional culture sectors with new creative arts
- Address issues related to international online payments

Promote and export

- Enhance the “Creative Angola” brand to promote exports and increase attractiveness in cultural and tourism circles
- Encourage private and public funding

Thank you!

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