

Unlocking Sierra Leone's Creative Future

Creative Economy Diagnostic and Road Map for Growth





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and Road Map for Growth

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Table of contents

Executive Summary	1
1. Introduction	4
1.1. Objectives of this report	4
1.2. Methodology and approach	4
1.3. Scope and limitations	6
1.4. Defining Sierra Leone's creative industries	7
2. Contextualizing Sierra Leone's Creative Economy	10
2.1. Economic significance of the creative economy globally	10
2.2. Global forces influencing Sierra Leone's creative economy	10
3. Overview of Creative Industries in Sierra Leone	14
3.1. Economic contribution	14
3.2. Employment contribution of the creative economy	16
3.3. Creative job intensity	17
3.4. Strategic creative industries	19
4. Opportunities and Barriers in the Creative Economy	20
4.1. Opportunities for market-level growth	20
4.2. Barriers affecting the Creative Economy	22
5. Value Chain Analysis of the Music Industry	32
5.1. Industry selection rationale	32
5.2. Value chain mapping	34
5.3. Skills and training	39
5.4. Cross-sectoral linkages	39
6. Strategic Directions and Transformation Pathways	42
6.1. Strategic vision for the creative economy in Sierra Leone	42
6.2. Short, medium and long-term actions	45
6.3. Conclusions	52
Annex I: Framework for Defining Creative Economies	54
Annex II: Case Studies	57
Annex III: Methodologies to Assess Priority Creative Industries	71
Annex IV: Analysis of IP Regulatory Environment	87
Annex V: Analysis of Gender Inclusion in Creative Economy	91
Annex VI: References	98



Executive Summary

Sierra Leone's creative economy represents a significant and underleveraged opportunity for inclusive economic diversification, cultural expression, and youth employment. According to high-level estimations—developed by combining GDP and employment data from the 2022 Census of Establishments with international benchmarking methodologies, sector mapping, and proxy measures detailed in Section 3—the sector accounts for an estimated 4.5 percent of gross domestic product, over 10 percent of formal employment, and 7.6 percent of all registered (non-micro) firms, making the broader creative economy categorization the country's second-largest formal employment generator after wholesale and retail. Despite this scale, the creative economy remains underdeveloped, and under-recognized in national development frameworks and economic policy. The sector is largely informal, fragmented, and dominated by micro-enterprises and individual entrepreneurs operating without access to finance, formal protections, or growth pathways.

Creative strongholds are already emerging across several key industries, offering a foundation for targeted expansion. Four industries (audiovisual & media, music, performing arts, and crafts) stand out as creative strongholds, combining high concentrations of creative jobs with strong overall employment. These industries employ film directors, musicians, artisans, and other specialists whose creative output is actively driving economic activity. Other sectors, including advertising, publishing, cultural heritage, and visual arts, demonstrate strong creative intensity but remain small in total employment. With targeted support, they hold substantial growth potential. Meanwhile, data limitations likely understate the creative value of the fashion & textiles industries, however it is anticipated that this industry also acts as a central creative stronghold, taking into account the need for design, styling and pattern-making. This aligns with regional dynamics: across Sub-Saharan Africa, the fashion and textiles industry is the second-largest employer after agriculture, with an estimated market value of USD 31 billion in 2020.

Five creative industries drive the majority of the country's creative economy's growth and job creation. Based on employment contribution, creative job intensity, and economic contribution, the following creative industries have been identified

as key strategic drivers: fashion and textiles (with an estimated 11,000 people formally employed), crafts (approximately 10,700 employed), as well as critical industries such as music, audiovisual & media, and publishing. Together, these five industries are estimated to account for approximately 84 percent of the country's creative economy.

The music industry was selected for in-depth value chain analysis due to its creative intensity, economic relevance, and regional visibility. Music is among the most creative job-intensive sectors in Sierra Leone, identified as a creative stronghold alongside audiovisual, performing arts, and crafts. It supports a high proportion of core creative occupations such as performance, songwriting, and production. Despite this, the

value chain remains fragmented and under-formalized, with missing intermediaries such as booking agencies, publishers, and collective rights organizations. The sector also shows strong collaboration patterns, highlighting its ecosystem potential: according to the creative economy survey carried out by the World Bank in 2025, 33 percent of Sierra Leonean musicians collaborate with other creatives more than twice per month, and an additional 56 percent report occasional collaboration. These collaborations span across creative disciplines—such as partnerships between musicians and audiovisual producers for music videos, or with fashion designers for stage costumes and branding. This high level of cross-sector engagement

reflects a dynamic and networked community, and suggests a foundation for building more integrated value chains and innovation hubs.

Despite this potential, the creative economy is limited by binding constraints that suppress job creation, growth and investment. These include: (1) lack of policy structure and coordination, (2) gaps in intellectual property protection and enforcement, (3) inadequate creative infrastructure, (4) lack of access to monetization platforms, and (5) restricted access to finance. Two additional, non-binding constraints—skills gaps and gender inequality—also limit sector inclusivity and resilience. While creative and technical talent is abundant, many artists lack business and digital competencies. Women face added structural barriers such as safety concerns, underrepresentation in leadership, and gender-based segmentation into lower-income industries.



Sierra Leone's youth represent a strategic demographic advantage for the creative economy. With 39.4 percent of the population aged 18 to 34, the country has a large, creative, and culturally engaged youth population. Many of the creative industries profiled—especially music, crafts, and fashion—attract young creators and entrepreneurs. However, this group remains underserved in terms of training, market access, and financial support. While creative and technical talent is abundant, many young people lack business and digital competencies required to monetize their work and scale their ventures. Formal pathways—such as skills certification, business incubation, and access to public support schemes—remain limited or inaccessible to most. Addressing these challenges could significantly improve the inclusiveness and long-term sustainability of the creative economy.

Sierra Leone's creative economy demonstrates areas of emerging potential that, if addressed strategically, could catalyze market-driven growth and employment contribution. Seven key policy opportunities have been identified: (1) Establishing a coordinated national policy framework to unify fragmented efforts and provide long-term strategic direction; (2) Unlocking digital monetization—by enabling access to platforms like YouTube, TikTok and Spotify—offering creatives new income streams with relatively low investment; (3) Strengthening intellectual property systems through effective regulation and the establishment of the Collective Management Organization to facilitate licensing and royalty collection, and monetization of their work; (4) Infrastructure development, particularly the creation of inclusive, accessible spaces and digital facilities, to support production, collaboration, and sharing of creative outputs; (5) Promoting business formalization to enable access to finance, public support schemes, and market participation; (6) Improving access to finance by piloting project-based financing instruments, expanding regulatory sandboxes, and establishing a Creative Economy Fund and sector-specific incubation programs; and (7) Encouraging cross-sector collaboration—such as linking music, fashion, film, crafts, and tourism—to enhance value chains and support innovation. Together, these opportunities lay the groundwork for a more resilient, dynamic, and inclusive creative economy.

A phased reform strategy is essential to unlocking the full potential of Sierra Leone's creative economy:

- **In the short term (1-2 years)**, priority actions should focus on foundational enablers: establishing a National Creative Economy Policy and cross-ministry Creative Economy Council to anchor strategic coordination; finalizing copyright regulations to provide legal clarity; and engaging monetization platforms like YouTube and TikTok to define eligibility criteria for Sierra Leonean creators. Short-term reforms

should also include piloting project-based financial tools through sandbox testing, promoting business formalization, and launching a “Status of the Artist” legal framework. On infrastructure, immediate efforts should map creative infrastructure gaps—including educational and digital needs—and align them with private sector investment potential.

- **In the medium term (3-5 years)**, reforms should focus on deepening institutional support and expanding delivery capacity. This includes allocating public budgets for priority creative industries, strengthening the Collective Management Organization to manage intellectual property registration and enforcement, and establishing public-private partnerships to develop creative infrastructure. Financial access should be expanded through the launch of a dedicated Creative Economy Fund and a tailored incubator-accelerator program for creative micro, small & medium enterprises. Regulatory streamlining should continue through a simplified licensing scheme, while cross-sector synergies—such as tourism, fashion, and audiovisual industries—can be encouraged through creative-tourism branding and bundled offerings.
- **In the long term (5+ years)**, reforms should be institutionalized across national planning and budget cycles. This includes the integration of the creative economy into broader development strategies, and the launch of sector-specific



growth schemes such as for film and animation. On monetization, a fully developed creator verification and rights management system should be operational. A digitized and accessible national intellectual property registry should be established, alongside public education campaigns on rights and obligations. Creative infrastructure investments should be accompanied by technical equipment support and capacity-building. Financial programs should evolve into export-oriented incubation platforms—for example, linking fashion designers to diaspora markets—and national certification frameworks should be introduced to enhance credibility and competitiveness.



Figure 1. Strategic actions to strengthen the creative economy

	Policy Structure	Digital Monetization	IP Infrastructure	Infrastructure Development	Access to Finance	Business Formalization	Cross-Sector Collaboration
SHORT TERM (1-2 YEARS)	- Establish National Creative Economy Policy - Establish cross-ministry Creative Economy Council	- Engage monetization platforms to define eligibility criteria - Conduct readiness gap analysis	Finalize Copyright Regulations	- Map infrastructure needs, inc. digital and educational - Assess private investor needs	Co-develop short-term, project-based financial tools via sandbox testing	- Promote business formalization - Pilot a "Status of the Artist" legal framework	Pilot bundled offerings linking music to fashion, tourism and hotel sourcing
MEDIUM TERM (3-5 YEARS)	Allocate public budget for priority creative industries	Facilitate partnerships with telecoms / fintech to improve mobile payments	Strengthen capacities of the CMO to manage IP registration	Establish public private partnership to develop priority creative infrastructure	- Establish CE Fund - Pilot incubator-accelerator program tailored to CE MSMEs	Launch simplified licensing scheme	- Develop creative-tourism partnerships - Integrate music and film into destination branding
LONG TERM (5+ YEARS)	- Review policy to further integrate CE into national development planning - Film & Animation Growth Scheme	Develop full monetization and rights mgmt ecosystems (e.g., verified creators)	- Establish digitized and accessible national IP registry - Run public education campaigns on IP rights	- Support technical equipment and use (capacity building) - Set up programming budget	Scale export-oriented incubation platforms (e.g. fashion-to-diaspora)	Introduce national certification frameworks to build market credibility	

Unlocking Sierra Leone's creative future requires bold action, long-term vision, and strategic investment. With the right policy framework, institutional support, and financing mechanisms, Sierra Leone's creative economy can move from fragmented potential to a dynamic engine of innovation, job creation, and cultural export. The country already possesses the raw ingredients: a young and entrepreneurial population, rich cultural assets, and creative industries with proven economic relevance. What is

now needed is the political will and coordinated action to nurture this ecosystem—strengthening institutions, connecting creatives to markets, and amplifying Sierra Leone's creative voice on regional and global stages. A commitment to the roadmap outlined in this report will enable Sierra Leone to take a bold leap forward and establish itself as both a vibrant center of cultural expression and a regional leader in Africa's creative transformation.

1. Introduction

1.1 Objectives of this report

Sierra Leone's creative economy holds untapped potential to contribute meaningfully to economic diversification, job creation, and cultural expression, particularly for youth. While creative activities are vibrant across music, fashion, crafts, performance, and design, their economic potential remains under-leveraged. Persistent barriers, including limited access to finance, weak infrastructure, data gaps, and fragmented governance, have prevented the sector from evolving into a driver of economic transformation. At the same time, the demographic dividend, with 39.4 percent of the population aged 18 to 34¹, presents a unique opportunity for youth-led innovation and entrepreneurship in the creative space.

This diagnostic assesses the structure, performance, and enabling environment of Sierra Leone's creative

economy to guide policy reforms and investment strategies. The World Bank Group, through its support for economic diversification and inclusive growth, has conducted a Creative Economy Diagnostic for Sierra Leone. This study assesses the creative economy's current landscape, identifies challenges and opportunities, and provides actionable recommendations to support its development. The findings aim to guide policy reforms, investment strategies, and capacity-building efforts, contributing to a more dynamic and resilient creative economy. The findings are complemented by a replicable Guidance Note, allowing the methodologies and insights developed in Sierra Leone to inform similar efforts in other countries with emerging creative economies.

1.2 Methodology and approach

This diagnostic aims to assess the current state of Sierra Leone's creative economy, with a focus on identifying constraints, opportunities, and priority areas for intervention. It encompasses both core creative industries (those that are involved intrinsically in cultural or creative arts, with potential for intellectual property management and digitalization) and broader industries (which relate partially or indirectly to creative and cultural areas), following an adapted classification system aligned with the World Bank's creative economy typology.

To guide this analysis, the diagnostic distinguishes clearly between the creative economy and creative industries:

- **Creative Economy (CE):** An overarching concept that encompasses all economic activities resulting from the knowledge, imagination, and creativity of individuals. It includes not only creative industries, but also cross-cutting services, enabling infrastructure, and broader cultural and economic spillovers. The CE reflects the full ecosystem supporting the production, distribution, and consumption of creative goods and services.

- **Creative Industries (CIs):** A subset of the creative economy, referring specifically to industries whose primary output is cultural, artistic, or entertainment-related. These typically include music, film, fashion, publishing, visual arts, crafts, and performing arts. CIs are typically defined by three shared characteristics: (i) the creation, protection, and monetization of IP; (ii) the leveraging of intangible assets and cultural heritage; and (iii) the use of digital technologies to enable content creation, distribution, and commercialization.

A key aim of this diagnostic is to assess and determine the priority industries for growth based on their potential to generate employment, income, and cultural value. The creative economy's growth potential varies significantly across industries, making prioritization essential. To enable decision-making, the creative economy landscape for Sierra Leone was first defined (see Annex I), as well as an assessment of the priority industries based on the assessment of three key criteria: employment creation, creative intensity, and economic contribution. Details of this methodology for prioritization can be found in Annex III.

¹ Census Survey, 2015

Prioritization methodology for creative industries

To identify priority industries within Sierra Leone's creative economy, a structured assessment was conducted using three key criteria:

- 1. Economic contribution** – To assess value added, the methodology matched ISIC-coded CIs to GDP data published in the 2024 Rebased GDP Report by Statistics Sierra Leone. Proportional contributions were estimated by:
 - Mapping creative industries to ISIC divisions
 - Estimating proportion of ISIC divisions associated with CIs
 - Adjusting for overlap or partial relevance where applicable
- 2. Employment contribution** – Using the 2022 Census of Establishments, the total number of jobs and firms in CIs was estimated. This allowed for identification of industries employing large numbers of workers, which signals both current relevance and scaling potential. Both core and broad creative industries were included to reflect the wider economic footprint.
- 3. Creative job intensity** – Creative job intensity was measured as the share of creative occupations within each industry. This approach assesses how fundamentally creative an industry is by analyzing the proportion of roles requiring creative skills. Calculations were based on national labor datasets—the 2014 Labor Force Survey (4-digit ISIC) and the 2018 Integrated Household Survey (2-digit ISIC). Industries were grouped into:
 - Creative Strongholds: High intensity and high employment
 - High-intensity, low-employment
 - High-employment, partially creative

See Annex III for further details.

The methodology for this diagnostic combines international best practices with context-specific tools to assess Sierra Leone's creative economy comprehensively. It is structured around three main elements: (i) desk-based research, (ii) fieldwork and stakeholder engagement, and (iii) analysis of primary and secondary data. This approach ensures that both macroeconomic and grassroots perspectives are captured, and that findings are grounded in data and validated through local engagement.

The desk review phase involved mapping global trends in the creative economy, analyzing local supply and demand conditions, reviewing existing policies, and identifying potential priority industries. This phase relied on a combination of public data, previous World Bank reports, and academic and policy literature. A multi-criteria analysis was employed to identify five high-potential industries based on criteria such as employment potential and economic contribution:

- Employment calculations drew on data from the 2022 Census of Establishments and sectoral disaggregation using ISIC codes, analyzing both total formal employment and the share of creative workers per industry. See Annex III for more details.
- GDP estimations were based on a proportional allocation methodology, applying sectoral creative shares to national GDP data, adjusted by creative intensity and occupational mapping. See Annex III for more details.

Music was selected for detailed value chain analysis due to its combination of creative intensity, economic footprint, and ecosystem development potential.

The music industry is one of the most creative job-intensive industries in Sierra Leone, contributing significantly to employment and value creation within the creative economy. It was classified as a creative stronghold using the World Bank's creative intensity methodology, reflecting the high share of core creative occupations such as songwriting, performance, and production. These characteristics, alongside music's strong cultural relevance and evidence of cross-industry collaboration, make it a strategic case to explore systemic enablers and constraints affecting sector growth. Further details on the music value chain analysis are provided in Section 5.

Fieldwork was conducted in March 2025 and involved direct engagement with a broad array of stakeholders in Freetown across the public sector, creative enterprises, financial institutions, academia, and civil society. The team held workshops, conducted in-depth interviews, and visited creative hubs in Freetown. An online survey was also distributed to Sierra Leonean

creative professionals, receiving 55 responses, representing approximately 6.5 percent of core creative firms in Sierra Leone². The survey provided valuable insights into income patterns, market access, skills, and technology adoption.

1.3 Scope and limitations

This diagnostic offers a foundational national assessment of Sierra Leone's creative economy, but is subject to geographic and data-related limitations that should inform interpretation of the findings. While the diagnostic offers a national-level perspective, the fieldwork and stakeholder engagement were geographically focused on Freetown, where a majority of organized creative activity, institutions, and markets are concentrated. As a result, the findings may underrepresent informal and community-based creative expressions—such as traditional dances and cultural heritage practices—that are more prevalent in the provinces.

The primary methodological constraint relates to the availability and classification of sectoral data.

Sierra Leone currently lacks formal, disaggregated national data on the creative economy. As in most countries, standardized creative industry codes are not embedded in national accounts or labor force surveys. To estimate the sector's size and contribution, the study relied on creative intensity analysis, mapping activities against International Standard Industrial Classification of All Economic Activities (ISIC) codes, and triangulating findings with data



² This percentage has been calculated based on data from the World Bank Assessment of Sierra Leone's Creative Economy (2025) and the 2022 Census of Establishments.

from the Labor Force Survey (2014), the Sierra Leone Integrated Household Survey (2018), and national GDP statistics.

Despite these challenges, the diagnostic has identified outcomes that are grounded in strong stakeholder engagement, case study evidence, and international good practice. The insights generated are sufficiently robust to inform policy design, investment targeting, and institutional support strategies. Recommendations have been framed to be adaptive and forward-looking, allowing for recalibration as improved data and sectoral governance systems become available over time.

1.4 Defining Sierra Leone's creative industries

The UNESCO Framework for Cultural Statistics was selected as a preliminary framework from which to categorize creative industries based on their cultural and economic roles. This framework was used as the primary basis for defining and categorizing creative industries in Sierra Leone based on key economic activities producing and distributing goods or services embodying cultural expressions. While it provides a structured approach, it may underestimate certain industries classified as creative under other definitions. The framework has therefore been adapted to cover broader activities which align with the situation on-the-ground in Sierra Leone.

Understanding creative industries – Key definitional elements

Despite broad agreement on the economic and cultural relevance of the creative economy, there is no universally accepted definition. Institutions such as UNESCO, UNCTAD, WIPO, and others have developed diverse yet complementary frameworks to analyze and support creative industries (see Annex I). This diagnostic draws from these international methodologies and tailors them to the Sierra Leonean context.

However, three core elements consistently emerge across global frameworks in defining creative industries:

1. First, these industries are closely linked to **intellectual property (IP) protection and monetization**, where creativity is not only expressed but also commercialized.
2. Second, they rely heavily on **intangible assets and the valorization of cultural heritage**, whether through traditional crafts, music, or artistic expression.
3. Third, they are increasingly shaped by **digitalization**, using technology to create, distribute, and market creative content across broader audiences.



The defining characteristics above help distinguish between core and broad creative industries within Sierra Leone's economy. Core creative industries (e.g., music, fashion design, film, publishing, and performing arts) inherently integrate all three elements—Intellectual property monetization, cultural value, and digitalization. Broad creative industries (e.g., architecture, software development, and information services.), by contrast, incorporate at least one of these elements to enhance their value, although their outputs may not be traditionally classified as creative.

For developing economies like Sierra Leone, both core and broad creative industries play important but distinct roles in advancing economic growth. Core creative industries can drive cultural expression, identity building, IP-based income generation, and export diversification, particularly through digital platforms. In contrast, broad creative industries hold potential to integrate creative skills into larger value chains, boost productivity, and support cross-sector

innovation. Given these differences, tailored policy measures are required: core industries may need support around IP enforcement, content creation, and artist formalization, while broad industries benefit more from skills development, digital access, and industry integration.

Local consultations further enriched the classification approach, ensuring it reflects Sierra Leone's cultural realities. Field engagement identified important industries, such as pageantry and culinary arts, that have not yet been adopted by the UNESCO framework but hold cultural and economic significance. Local insights have also led to the classification of Sierra Leone's creative economy clusters into four main domains — visual arts, performing arts, digital arts, and cultural heritage. These industries, whether core or broad, leverage cultural assets, creativity, and digital tools, offering pathways for formalization, growth, and global positioning.

Figure 2. Sierra Leone's creative economy



Source: Consultants' Analysis; World Bank Assessment of Sierra Leone's Creative Economy (2025)



2. Contextualizing Sierra Leone's Creative Economy

2.1 Economic significance of the creative economy globally

Creative industries are an increasingly important contributor to global trade, GDP, and employment.

The global market for cultural goods and services expanded significantly between 2002 and 2015, doubling from USD 208 billion to USD 509 billion³. By 2022, creative services exports reached a record USD 1.4 trillion in 2022, while creative goods exports totaled USD 713 billion. According to the United Nations Conference on Trade and Development (UNCTAD)⁴, creative industries now contribute between 0.5 percent and 7.3 percent of GDP, and between 0.5 percent and 12.5 percent of employment, based on data reported by 36 countries across Africa, Asia, Latin America, the Caribbean, and Europe⁵.

Africa's creative economy is emerging as a vibrant and fast-growing sector, contributing to economic diversification, youth employment, and cultural expression across the continent. The creative economy is currently estimated to generate approximately USD 4.2 billion annually, with a growth rate that surpasses that of several other economies⁶. In recorded music, Sub-Saharan Africa's (SSA) revenues grew by 22.6 percent in 2023, surpassing USD 100 million for the first time. South Africa remained the region's largest market, accounting for 74.6 percent of total revenues, following growth of 14.4 percent that year⁷. The textile and fashion industry is the second-largest employer after agriculture in SSA, with an estimated market value of USD 31 billion as of 2020, a projected Compound Annual Growth Rate (CAGR) of 5 percent and the capacity to generate up to 1.5 million new jobs annually⁸. In film, Nollywood is Africa's largest film industry, producing over 2,500 movies annual and generating approximately USD 6.4 billion in revenue⁹.

2.2 Global forces influencing Sierra Leone's creative economy

Sierra Leone's creative economy operates in a global environment shaped by dynamic external trends and internal structural factors. Understanding these forces is crucial for identifying opportunities to catalyze sector growth, as well as risks that could constrain development if left unaddressed. Several global trends are impacting Sierra Leone's creative industries, considering both opportunities and threats. The main factors influencing the sector are:

| Digitalization of the sector

Globally, the creative economy is undergoing a transformation driven by rapid technological change, evolving consumer preferences, and shifting trade patterns. Emerging technologies such as Artificial Intelligence (AI), blockchain, and new digital distribution models are opening unprecedented opportunities for content creation, dissemination, and monetization. These developments lower barriers to market entry, enabling creatives—particularly in developing economies—to access international audiences with fewer intermediaries and at lower cost. In Africa, increased internet penetration, mobile technology adoption, and the youthful demographic profile are fueling a vibrant creative ecosystem with global appeal.

In Sierra Leone, digital platforms are expanding monetization opportunities for creatives, but gaps in access and infrastructure persist. Internet penetration grew by 2.1 percent between 2023 and 2024, reaching 20.1 percent of the population¹⁰. The rise of digital platforms like YouTube and Spotify, combined with increasing access to mobile money, offers a foundation for creatives to monetize their content and reach new markets. Subscription and membership-based models provide emerging income streams that were previously inaccessible. However, alongside these opportunities, significant risks persist¹¹. Rapid digitalization has led to market saturation, intensifying competition for visibility on global platforms. More specifically to Sierra Leone, creatives in emerging markets often face a disadvantage in digital monetization, due to exclusion from global payment systems, limited access to copyright protections, and weak digital infrastructure. These challenges are explored further in the following sections.

³ Culture and Creativity for the Future of Cities: Theory, Practices, and Methodologies from African, Asian, and Latin American Countries.

⁴ Creative Economy Outlook 2024.

⁵ UNCTAD's estimates focus specifically on core CIs only. As such, these figures are not directly comparable with this diagnostic's broader definition of the CE, which encompasses cross-cutting services, digital infrastructure, and cultural spillovers.

⁶ Semafor. (2025). Africa's creative economy seeks more investors.

⁷ IPFI Global Music Report 2025.

⁸ African Development Bank. (2025). Fashionomics Africa Investment Readiness (FAIR) Program.

⁹ Tech Culture Africa. (2025). Nigeria's Nollywood is Africa's Largest Cine Hub; Here's Why.

¹⁰ DataReportal Digital 2024: Sierra Leone—Global Digital Insights

¹¹ Humanities Blog | What are the biggest challenges facing the creative industries – and how can we address them?

| Diaspora engagement

The Sierra Leonean diaspora is a powerful, underleveraged force shaping the country's creative economy. Comprising over 52.5 percent of tertiary-educated Sierra Leoneans, many of whom live in the United Kingdom, United States, and Canada, this community possesses high levels of education, middle-class incomes, and diverse professional expertise¹². In 2023, remittances accounted for 6.8 percent of Sierra Leone's GDP, underscoring their economic impact¹³.

Beyond financial contributions, the diaspora serves as cultural ambassadors, fostering global interest in Sierra Leonean arts, music, and heritage. Digital platforms have facilitated easier sharing and commercialization of cultural content, enabling diaspora communities to access and promote Sierra Leonean creative works. Events like the Sierra Leone Diaspora Investment Conference¹⁴ highlight the diaspora's commitment to cultural and economic development, providing avenues for collaboration and investment in creative industries.

| Tourism growth

Tourism is a key driver of Sierra Leone's creative economy, offering robust market linkages for cultural goods, services, and experiences. In 2019, tourism contributed 5 percent of GDP, generated USD 39 million in exports, and supported over 56,000 jobs¹⁵. International arrivals more than doubled in recent years, reaching 114,533 in 2022¹⁶, and are expected to continue growing following investments such as the new air terminal (2023) and expanded direct flight access to Europe. More recently, tourism and related services have become the largest source of formal private sector jobs, accounting for 24 percent of formal employment and experiencing a 65 percent increase in employment over the past three years, much of it outside urban areas¹⁷. This growth enhances demand not only for accommodation and hospitality services but also for authentic local experiences—including crafts, fashion, music, live performances, and cultural storytelling, particularly among diaspora and eco-cultural tourists.

¹² World Bank (2015). Sierra Leone Diaspora Investment & Trade Study.

¹³ Sierraloded (2025). From Aid Dependence to Diaspora Power: Sierra Leone's Path Forward.

¹⁴ Swit Salone News (2024). What Really Happened at the Sierra Leone Diaspora Investment Conference.

¹⁵ Invest in Tourism in Sierra Leone - Sierra Leone's Investment and Export Promotion Agency

¹⁶ Ministry of Tourism & Cultural Affairs. (2023). Sierra Leone Tourism. A portfolio of investment opportunities

¹⁷ World Bank Enterprise Surveys, 2023.

Heritage tourism initiatives are expanding commercial pathways for creatives and attracting diaspora engagement. A recent example is the Freetown City Council's partnership with AfricaOracle, supported by the EU's EUDiF Capacity Development Lab, which enhanced customer experiences at heritage sites under the Transform Freetown agenda¹⁸. This initiative strengthened the link between cultural expression and tourism by positioning local history and artistic assets as commercially viable attractions.

Origin-based branding is elevating Sierra Leonean creative products in both domestic and export markets. The "Made in Sierra Leone" campaign, spearheaded by Invest Salone, responds to global trends favoring authenticity and ethical production. As explained by campaign lead Chukwu-Emeka Chikezie, it aims to raise awareness of the economic impact of locally produced goods and help Sierra Leonean products compete with imports while seizing niche export opportunities¹⁹. This type of branding reinforces the tourism sector's demand for quality fashion, textiles, home décor, and curated experiences rooted in national identity and culture.

| Regional competition

Sierra Leone's creative industries face competitive pressure from better-established regional hubs such as Nigeria, Kenya, and South Africa. These countries have cultivated robust creative ecosystems with larger talent pools, more developed financial systems, supportive infrastructure, and strong digital connectivity. Their global visibility is further reinforced by significant international investment and consistent government support—enabling them to build influential brands in industries like film, music, and digital content.

Sierra Leone's creative economy remains largely informal and under-resourced, limiting its ability to compete and scale. Most creative businesses operate outside formal structures, lacking access to finance, legal protections, and production infrastructure. This makes it difficult to attract investment or professionalize operations—key ingredients for growth observed in neighboring markets.

Limited access to market intelligence and weak regional networks further constrain competitiveness. Creative entrepreneurs often lack information about market demand, pricing standards, and industry contacts. As a result, they struggle to position their products competitively or connect with buyers and curators beyond national borders. Only 34 percent of survey respondents reported targeting international markets, underscoring missed opportunities for regional and global exposure.

¹⁸ EUDiF. (n.d.). Local heritage tourism as a connection to diaspora in Sierra Leone.
¹⁹ Thomas, A. R. (2023). Sierra Leonean made goods and services competing with imports. The Sierra Leone Telegraph.



| Innovation in CE financing

Local stakeholders support piloting financial products tailored to creative economy realities through regulatory innovation. During consultations with Sierra Leone's financial institutions, banks and fintech firms acknowledged the challenges in evaluating creative enterprises through traditional risk metrics. As a response, stakeholders proposed expanding the regulatory sandbox operated by the Bank of Sierra Leone to include creative industries

pilots. These could test short-term project loans, micro-leases for tools and equipment, and portfolio-based creditworthiness models that use alternative data sources—such as proof of past performance, digital sales history, and client endorsements. These approaches would allow institutions to serve underserved creative entrepreneurs while mitigating risk through data-driven design.

The Bank of Sierra Leone's regulatory sandbox

Established in 2018, the Bank of Sierra Leone (BSL) launched its Regulatory Sandbox Pilot Program to foster innovation in the financial sector while ensuring consumer protection and financial stability. The inaugural cohort included four fintech companies (InvestED, iCommit, MyPay, and Noory) which were granted a 12-month period to test and evaluate their technologies and business models under the supervision of a dedicated, cross-functional team within BSL. The sandbox is designed to provide a controlled environment for fintech firms to experiment with innovative financial products and services that have the potential to enhance financial inclusion in Sierra Leone. The success of the initial cohorts has led to the licensing of several fintech solutions, such as MiKashBoks and Klasha, which have contributed to the diversification and modernization of Sierra Leone's financial landscape²⁰.

Blended finance models—combining public and private capital—are proving effective in regional comparators and offer a pathway for Sierra Leone.

Nigeria's Creative Economy Development Fund (CEDF) provides a strong example of an institutional financing structure that can be adapted to Sierra Leone. Launched in 2025, the CEDF is structured with multiple financing windows tailored to different needs in the creative economy, including debt, equity/quasi-equity, and grant funding. The Ministry of Finance Incorporated (MOFI) acts as the fund's anchor shareholder and sponsor, while day-to-day management is handled by an independent investment team with creative economy expertise and an oversight committee of public and private sector stakeholders²¹. The model is designed to de-risk private capital by strategically using public investment to attract co-financing. Though specific figures on the share of public capital are not disclosed, early demand for the fund has been strong—with 1,230 applications totaling USD 326 million in requests within its first 30 days²². It offers a suite of instruments and applies a merit-based selection process to support investment-ready creative businesses. This kind of model enables public funding to catalyze growth and accountability through private sector participation, and provides a useful precedent for Sierra Leone.

Sierra Leone's National Payment Switch provides the digital infrastructure to support inclusive, cash-flow based financing models²³. Initially launched in 2023 with card and point-of-sale interoperability, the platform entered a new phase with the rollout of its Instant Payment Service, as announced by the Governor of the Bank of Sierra Leone in February 2025. The system enables real-time, direct transfers between banks and between banks and mobile money operators, eliminating the need for cheques and traditional delays. This infrastructure significantly improves interoperability and supports the creation of digital transaction histories for creatives, especially those previously excluded from formal financial systems²⁴. Over time, it can underpin tailored credit scoring models and enable larger-scale innovations such as crowdfunding, royalties-based lending, and community savings schemes, providing critical financial pathways for Sierra Leone's creative economy.

²⁰ Africa Young Voices. (2023). MiKashBoks, group-savings tech firm, obtains financial services licence from Bank of Sierra Leone.

²¹ Ministry of Art, Culture and the Creative Economy, Nigeria. (2025). CEDF Roll-Out Strategy Communication.

²² Sunday, P. (2025). CEDF gets over 1,230 applications seeking \$ 326 M funding in 30 days. Nigeria Startup Act.

²³ World Bank Group. (2023). Sierra Leone Taps Fast Payment Systems to Promote Fast Progress with Financial Inclusion.

²⁴ Adama Vandy, J. (2025). Sierra Leone launches Instant Payment Service. Ministry of Information and Civic Education.

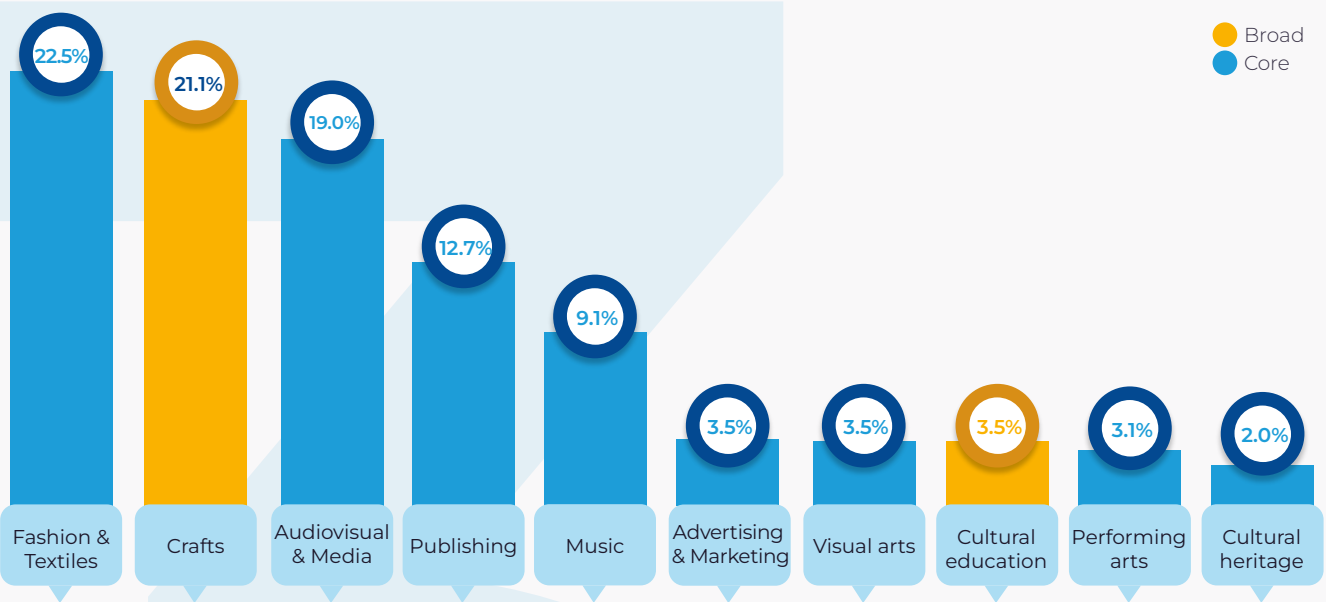
3. Overview of Creative Industries in Sierra Leone

3.1 Economic contribution

Creative industries could account for approximately 4.5 percent of Sierra Leone's GDP in 2023. To support the assessment of employment and creative job intensity, high-level estimations were developed by combining national GDP data with ISIC code mapping and proxy indicators (see Annex III for further details). Although comprehensive sector-specific data remains limited, an indicative mapping of the economic contribution of creative industries to the national economy suggests that Sierra Leone's

creative economy plays a measurable role in national economic output. Due to the reliance on aggregated sector-level GDP data and international benchmarking—rather than direct firm-level or survey-based measurements—these calculations follow a top-down approach and should be interpreted as indicative estimates. They provide an approximate picture of the sector's scale and are intended to offer directional insights into the relative size of different industries within the creative economy²⁵.

Figure 3. Estimated contribution of CIs to the creative economy's GDP



Source: Estimates based on Sierra Leone GDP Data 2023 using the applied methodology; ISIC (Revision 4)

The preliminary estimations show that the creative economy in Sierra Leone is led by five primary creative industries: fashion & textiles, crafts, audiovisual & media, publishing, and music—all of them core industries except for crafts. Together, these five CIs are estimated to account for approximately 84 percent of the creative economy. Fashion and textiles emerge as the largest contributor²⁶, followed by crafts and audiovisual activities, reflecting growing demand for locally produced content and cultural products. Publishing continues to represent important traditional creative industries, while music remains a vibrant cultural and economic force.

Sierra Leone's creative economy is smaller than regional peers but follows a similar structural pattern.

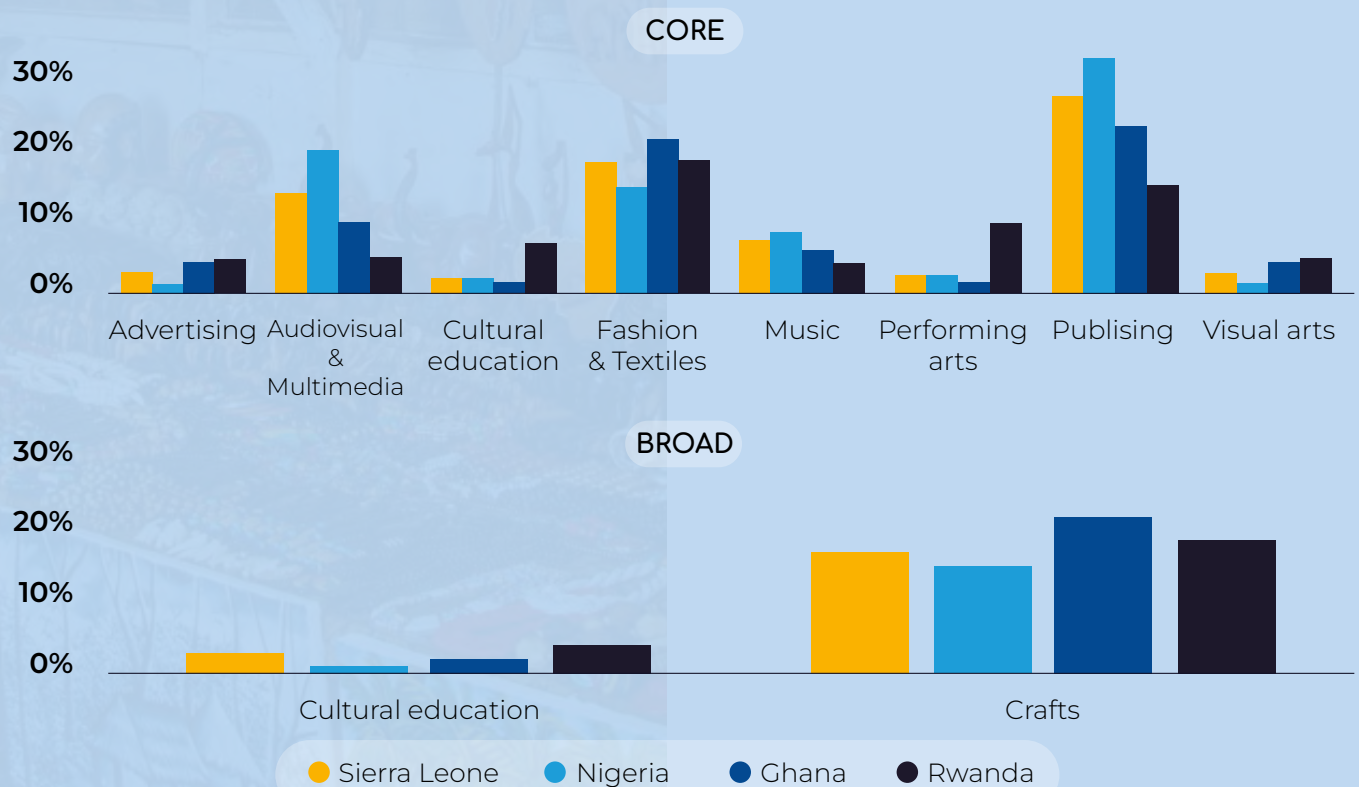
Applying the same GDP-based estimation method to three benchmark countries—Nigeria, Ghana, and Rwanda—confirms this. While Sierra Leone's creative economy contributes an estimated 4.5 percent of GDP, the share is significantly higher in Nigeria (12.5 percent), and moderately higher in Ghana (6.5 percent) and Rwanda (6.1 percent)²⁷.

²⁵ Due to availability of GDP data, the GDP estimations do not include the three following creative industries: culinary arts, pageantry and beauty & cosmetics.
²⁶ The fashion & textiles category includes both creative and non-creative activities, such as the manufacturing of textiles (ISIC division 13), wearing apparel (division 14), leather and related products (division 15), and furniture (division 31). As a result, the contribution of this industry to the creative economy may be somewhat overestimated. In any case, the estimates derived from these sources are indicative and intended to support prioritization decisions, rather than serve as definitive measures of the creative economy.
²⁷ Estimates based on Nigeria GDP Data 2023, Ghana GDP Data 2023, and Rwanda GDP Data 2023, using the applied methodology; ISIC (Rev. 4).



- Nigeria's creative economy benefits from a well-established audiovisual & media sector. The country's dominant contribution comes from industries like film and television (e.g. Nollywood) and music, which are both export-oriented and commercially mature. This explains its comparatively high creative sector share of GDP.
- Ghana and Rwanda show similar creative economy sizes, with differing sector strengths. Ghana's framework is supported by the Ministry of Tourism, Culture and Creative Arts and the Creative Arts Agency, while Rwanda has taken more recent, proactive steps to grow its creative industries, despite a smaller economy overall.
- Crafts and fashion consistently appear as the largest creative industries across all countries. This is due to the methodology's inclusion of manufacturing-based activities (e.g. textiles, footwear, handcrafts), which may overstate their size if broader non-creative manufacturing is captured under ISIC codes.

Figure 4. Economic Contribution Benchmarking - Breakdown of CIs by broad and core creatives



Source: Estimates based on Sierra Leone GDP Data 2023, Nigeria GDP Data 2023, Ghana GDP Data 2023, and Rwanda GDP Data 2023, using the applied methodology; ISIC (Rev. 4)

3.2 Employment contribution of the creative economy

Creative industries (core and broad combined) are the second-largest formal employment generator in Sierra Leone, accounting for approximately 10 percent of total employment. According to data from the 2022 Census of Establishments, creative industries represent 10 percent of formal employment, 7.6 percent of regular firms, and 8 percent of total formal sector sales—placing them just behind wholesale and retail trade in terms of labor absorption. This contribution challenges the perception of the creative economy as marginal and highlights its centrality in Sierra Leone's formal sector job landscape.

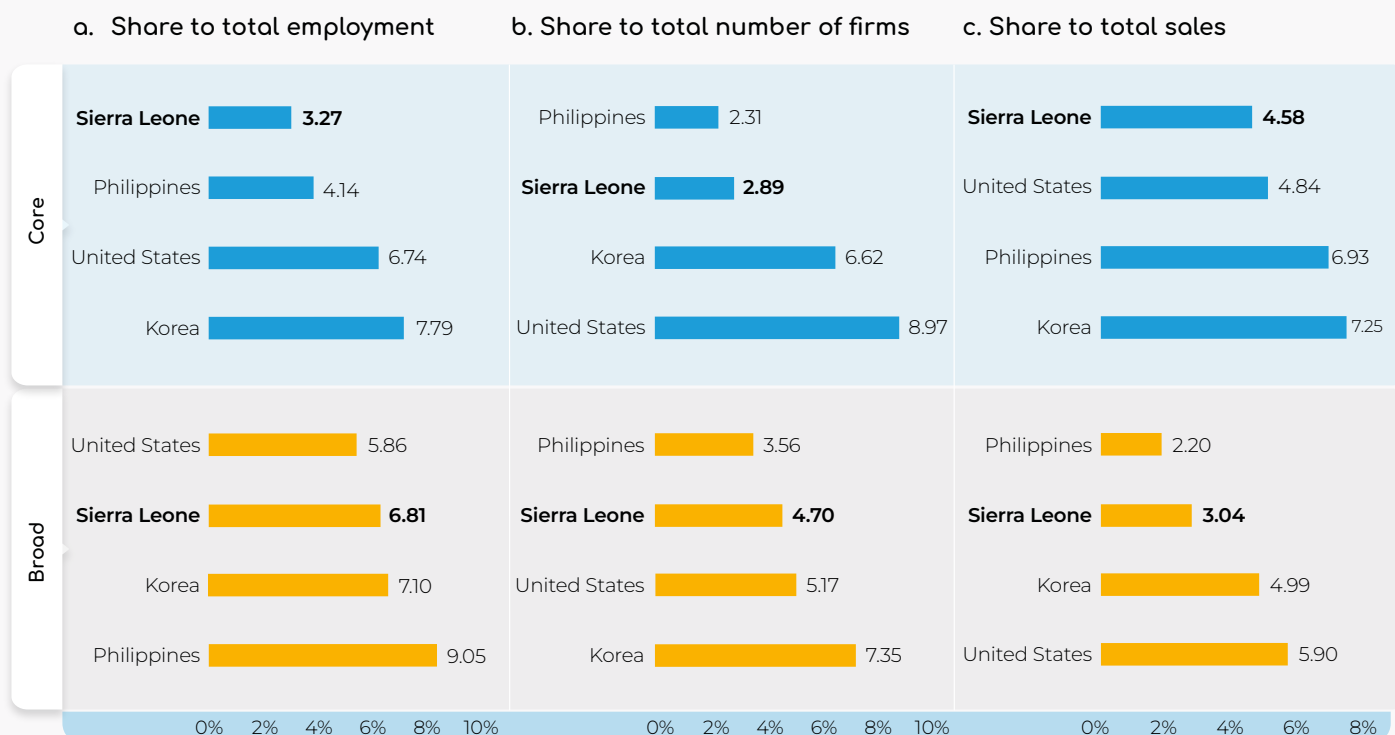
Core creative industries alone account for 3.3 percent of employment, 3 percent of registered firms, and 3 percent of formal sales, while broader creative industries raise the total contribution to 10 percent. The figures were estimated by applying a “creative intensity” methodology to national establishment data (2022 Census), supported by occupational data from the 2014 Labor Force Survey and 2018 Sierra Leone Integrated Household Survey. This methodology (see Annex III) estimates the share of creative occupations in each industry (based on ISIC codes) and calculates the sectoral footprint of creative work across both core and broad domains.

Disaggregated analysis reveals that Sierra Leone's core creative industries currently have a smaller

employment footprint than broad creative industries, but both require tailored policy responses. The apparent dominance of broad creative employment is partly due to its inclusion of larger, more diverse sectors—such as information & technology, engineering, and manufacturing—where creative roles are present but not dominant. This emphasizes the need to distinguish between policy tools: core creatives often require IP protection, grants, and infrastructure, while broad creatives may benefit more from skills upgrading, innovation financing, and market access.

Benchmarking reveals that Sierra Leone's creative employment shares are broadly consistent with global peers at similar levels of development. Core creative industries in Sierra Leone contribute a similar share of employment and firms as the Philippines, a lower-middle-income comparator with comparable digital infrastructure and creative sector maturity. Both countries exhibit relatively stronger performance in broad creative industries. In contrast, aspirational peers like South Korea and the United States show higher contributions from knowledge- and IP-intensive creative industries. This suggests that, while structural limitations exist in core subindustries, Sierra Leone has an opportunity to pursue dual-track growth—strengthening broad creative industries in the near term while building capabilities in core industries over time.

Figure 5. Size of the creative economy



Sources: Sierra Leone: 2022 Census; Philippines: Annual Survey of Philippine Business and Industry (ASPBI) 2018 (with survey weights); South Korea: 2020 Economic Census; United States: 2017 Economic Census.

3.3 Creative job intensity

Targeting creative industries with both high job intensity and strong employment potential is critical for maximizing impact in a resource-constrained environment. To support sector prioritization, the World Bank applied a creative job intensity methodology (see Annex III for further details), analyzing the share of creative occupations relative to total employment across industries. This approach draws from international best practices and uses industry-level employment data from the 2014 Labor Force Survey (LFS) and the 2018 Sierra Leone Integrated Household Survey (SLIHS), to classify creative industries based on both employment scale and creative worker concentration.

Measuring creative intensity using creative workers

This methodology estimates the share of creative occupations across industries, classified at the 4-digit ISIC level. This methodology defines the Creative Intensity ($CI_{i,k}$) of industry i in country k as the proportion of creative occupations relative to total occupations in that industry. For each category, we calculate creative intensity using the following equation:

$$CI_{i,k} = \frac{\sum_{o \in O} E_{o,i,k}}{E_{i,k}}$$

where:

- $CI_{i,k}$ represents the creative intensity for industry i in country k
- O is the set of occupations
- $E_{o,i,k}$ is the employment in occupation o within industry i in country k
- $E_{i,k}$ is the total employment in industry i in country k



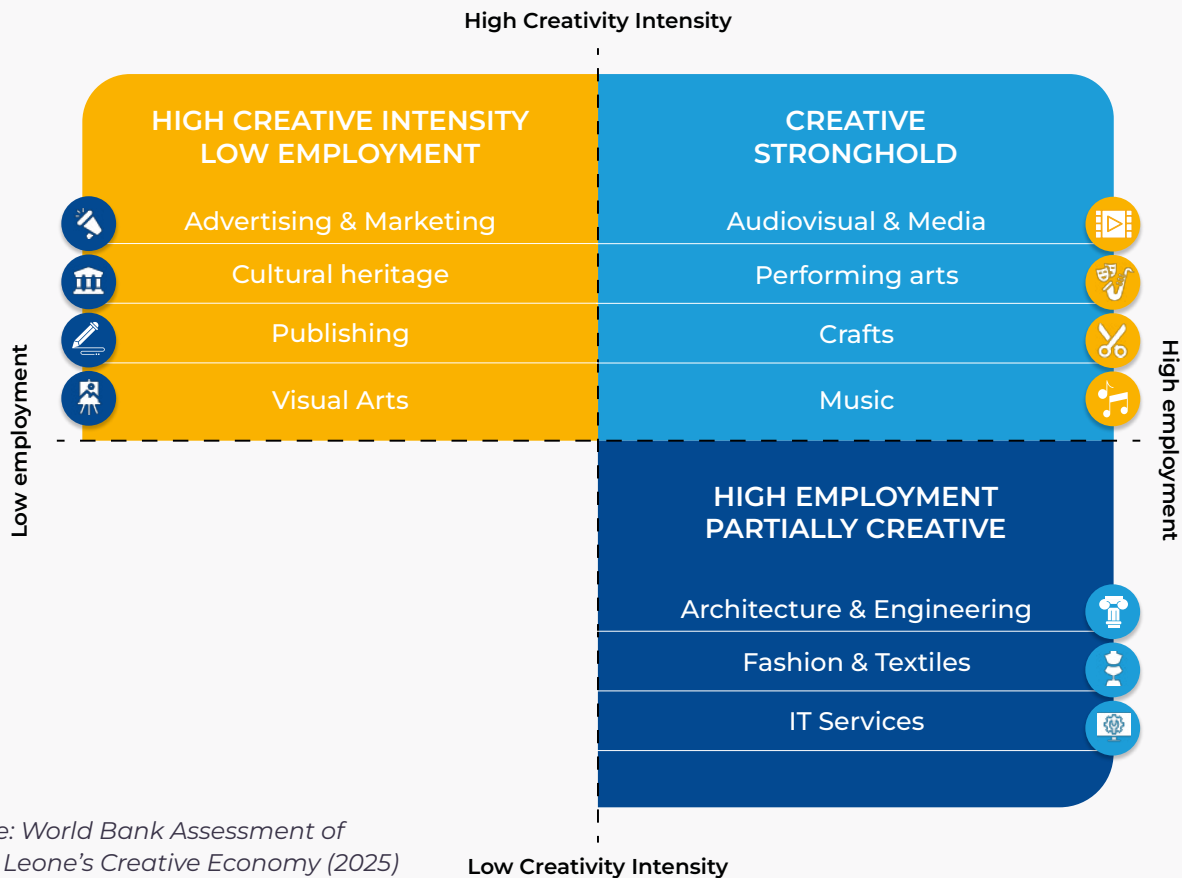
Industries were categorized into three groups²⁸ based on their creative job intensity and employment footprint. These groupings help identify where creativity is already embedded at scale, and where greater creative integration could unlock new economic value:

- **Creative Strongholds** are industries that demonstrate both high creative job intensity and substantial employment numbers. These industries already have extensive creative activities and significant workforce presence, making them natural priorities for continued development and support.
- **High creative intensity-low employment sectors** include high creative job intensity but low employment. Industries in this group have significant creative assets embedded in their activities due to the high presence of creative workers.
- **High employment in low creative job intensity sectors**, suggesting untapped opportunities with targeted support to increase creative elements in their operations in order to generate significant creative output and economic value.

²⁸ It is important to note that the World Bank analysis has been completed at the 4-digit ISIC activity, whereby several activities can be grouped into one creative industry. The groupings shown here highlight the outputs at the industry level, rather than at the activity level. In instances where an industry's activities could be classified into multiple groups (i.e. comprising of a mix of activities which are both high and low in employment), the highest creative intensity rating was selected for that industry.



Figure 6. Creative Intensity Analysis of Sierra Leone Creative Industries



Source: World Bank Assessment of Sierra Leone's Creative Economy (2025)

Four industries emerge as creative strongholds: Audiovisual & Media, Music, Performing Arts and Crafts. These industries distinguish themselves by combining high concentrations of creative jobs with significant overall employment figures. They engage a wide range of creative professionals, including film directors and producers, performing artists, cultural specialists, handicraft artisans, and broadcasting technicians. The integration of these specialized creative roles within strong employment industries suggests that creative assets are already being generated and utilized, presenting opportunities for further development to fuel economic growth.

Four industries were identified as having creative intensity but overall low employment numbers: Advertising & Marketing, Cultural Heritage, Publishing & Visual Arts. Although these industries exhibit strong creative talent, as reflected in their high creative job intensity, their overall employment levels remain relatively low compared to other industries. The presence of creative assets — such as skilled journalists — indicates that creativity plays a key role in their production processes. With targeted investment and support, these sectors have the potential to build on their existing creative strengths and drive substantial growth.

Fashion & Textiles is currently classified as a high-employment, partially creative industry, though this

underrepresents its true creative value. This is due to the focus on manufacturing activities as part of the methodology and data available, which focuses on the technical specialist capacities which can be defined using ISIC categorizations, as opposed to creative skills. It should however be noted that a broader definition of the Fashion & Textiles industry includes highly creative activities such as designing (patterns, weaves, costumes, etc.) and styles, among others. It is noted that, should data be available on these activities, the sector would likely be grouped as a Creative Stronghold.

Two additional industries—Architecture & Engineering, and IT Services—have broad employment and some creative functions, even if their overall creative intensity is low. Although these industries may not have a high concentration of creative workers, they employ large numbers of people throughout Sierra Leone. The creative professionals they do engage, including engineering experts, architects, planners, software developers, IT support technicians, and printing trades workers, highlight the presence of valuable creative skills within their workforce. This broad employment base offers a unique opportunity: even with lower creative job intensity, these sectors have the potential to drive growth through their size. By integrating more creative inputs into these already strong industries, Sierra Leone could significantly expand its creative economy.

3.4 Strategic creative industries

Strategic creative industries have been identified based on their potential to generate employment, drive economic growth, and build on Sierra Leone's existing comparative advantages. The aim of this report is to support the development of a creative economy that contributes meaningfully to job creation, revenue generation, and inclusive development. Therefore, prioritization of creative industries is grounded in a hybrid methodology that draws on the analysis presented in earlier sections and balances both quantitative and qualitative criteria. Key factors in the defining of priority industries have included:

- Contribution to employment – Industries demonstrating significant current or potential capacity to absorb labor, particularly youth and women.
- Creative job intensity – Sectors where creative functions are concentrated within a job role and central to value creation.
- Economic footprint – Industries contributing meaningfully to economic growth, firm formation, and formal sector sales.
- Comparative advantage – Areas where Sierra Leone shows cultural depth, emerging talent, or existing market positioning that can be scaled competitively.
- Stakeholder validation – Alignment with national context and insights from stakeholder interviews, including identification of sector functioning and dynamism.

The five industries selected reflect a strategic combination of economic scale, employment potential, and alignment with Sierra Leone's cultural assets and market strengths. High-level estimations suggest that creative industries could have accounted for approximately 4.5 percent of national GDP in 2023. This prioritization reflects a combined approach grounded in employment figures, creative job intensity, GDP contribution, and alignment with stakeholder insights. The selected industries offer a strategic mix of scale, inclusion potential, and comparative cultural advantage. Together, they represent approximately 84 percent of Sierra Leone's creative economy.

Fashion and textiles is the largest contributor to Sierra Leone's creative economy, accounting for 22.5 percent. With approximately 11,134 formal jobs, the industry blends traditional craft (such as Gara and Tie-Dye) with modern fashion design. It is a major source of employment and cultural expression, offering strong opportunities for youth entrepreneurship, local manufacturing, and export growth—particularly through diaspora and tourism markets.

Crafts contribute 21.1 percent of the country's CE and are integral to rural economies, women's livelihoods, and cultural preservation. Employing around 10,700 workers, the industry spans artisanal products such as basketry, pottery, and wood carving. It is deeply rooted in traditional knowledge systems and contributes to tourism and heritage value chains.

Audiovisual & media contributes 19 percent of Sierra Leone's creative economy, with high youth engagement and digital growth potential. The industry, which includes film and television, it is among the most creative job-intensive industries, reflecting rising demand for local storytelling and increasing access to digital platforms. Strengthening monetization systems and infrastructure could unlock significant growth.

Publishing accounts for 12.7 percent of the country's creative economy and plays a critical role in knowledge dissemination, civic engagement, and literacy. This industry includes journalists, authors, and content creators, offering a high concentration of creative roles. Opportunities exist to modernize the industry through digital platforms and content diversification.

Music contributes 9.1 percent of Sierra Leone's CE and remains one of the most dynamic cultural industries in Sierra Leone. The industry encompasses traditional genres, contemporary Afrobeats, and gospel, with strong youth involvement and diaspora appeal. Despite challenges in IP protection and monetization, the industry offers significant potential for regional and international expansion.



4. Opportunities and Barriers in the Creative Economy

4.1 Opportunities for market-level growth

Sierra Leone's creative economy is uniquely positioned to contribute to inclusive economic transformation through domestic and international demand, and diaspora markets. Despite persistent barriers (e.g., limited infrastructure, access to finance, skills gaps), multiple opportunities exist to drive innovation, foster youth employment, and boost cultural exports. Realizing this potential requires not only addressing supply-side gaps, but also activating demand and identifying the specific market niches in which Sierra Leone can compete.

| Domestic market

The country's youthful demographic, and evolving consumer preferences create a vibrant domestic market for creative goods and services. In 2025, Sierra Leone's apparel market alone has an estimated value of over USD 206 million²⁹, with traditional clothing and women's apparel accounting for the largest share. Similarly, the home décor market—anchored in locally made furniture and textiles—is estimated to reach USD 5.81 million³⁰. These figures reflect a broader cultural revival driven by national pride, increased access to digital content, and a growing appetite for heritage-based products.

The revitalization of Sierra Leone's fashion and textiles sector underscores the domestic market's potential. The launch of the Fashion, Design and Textiles Association in June 2024 marked a significant step towards organizing and promoting the industry. This initiative aims to enhance the competitiveness of local brands, improve skills, and strengthen supply chains, thereby positioning Sierra Leonean fashion as

a creative force both domestically and internationally³¹. The association's efforts are complemented by partnerships with international entities, such as the fashion collaboration between Freetown and Milan, which focuses on skills exchange and sustainable practices³².

| Diaspora market

Diaspora markets are a growing and underleveraged source of demand for Sierra Leone's creative products. An estimated 187,000 Sierra Leoneans live abroad—primarily in the United States, United Kingdom, and West African countries such as Liberia and Senegal³³. Remittances from the diaspora reached USD 230 million in 2023³⁴—close to the country's annual foreign direct investment—and diaspora investment interest is rising, as seen in initiatives like the annual Sierra Leone Diaspora Investment Conference³⁵ and the EUDiF-supported heritage tourism strategy in Freetown³⁶. These dynamics highlight the diaspora's potential not just as a funding source, but as a key consumer base and cultural distribution channel.

Diaspora engagement is also fostering innovation and entrepreneurship within Sierra Leone's creative industries. Diaspora-led brands such as Gitas Portal, Ibrahim Kamara, or Labrum London, are gaining international recognition by blending West African aesthetics with contemporary fashion³⁷. These ventures not only showcase Sierra Leonean culture on global platforms but also create opportunities for local artisans and producers through cross-border collaborations.

²⁹ Statista. Apparel Sierra Leone.

³⁰ Statista. Home décor Sierra Leone.

³¹ Invest Salone. (2024). Sierra Leone's fashion and textiles industry launches new national association.

³² Chikezie and Kumar (2022). Sierra Leone Fabrics and Fashion: Prospects and Challenges for the sector.

³³ EUDiF (2023). Diaspora engagement mapping. Sierra Leone.

³⁴ Reed, K. (2025). Catalysing diaspora investment in Sierra Leone. Invest Salone.

³⁵ Sierra Leone Diaspora Investment Conference 2025

³⁶ EUDiF. (n.d.). Local heritage tourism as a connection to diaspora in Sierra Leone

³⁷ Benissan, E. (2023). How Labrum London is weaving West Africa's new fashion story. Vogue Business.

| International market

International demand for African cultural content is growing rapidly, and Sierra Leone is well-positioned to enter these markets if strategic investments are made. Global consumer preferences are shifting toward ethically sourced, culturally authentic, and origin-branded products. Sierra Leonean creatives—particularly in fashion, crafts, music, and design—are well-positioned to capitalize on this trend³⁸. The “Made in Sierra Leone” campaign reflects this trend and can help differentiate Sierra Leonean fashion, crafts, and digital content in export markets. Under the African Continental Free Trade Area (AfCFTA), Sierra Leone now has access to a continental market of 1.3 billion people³⁹.

Other African countries are successfully tapping into this growing international demand, offering models that Sierra Leone can adapt. Nigeria's creative industry, for instance, has evolved into a global powerhouse, especially in music and film. Afrobeats artists like Burna Boy and Wizkid have achieved international acclaim, while Nollywood films are widely distributed on global streaming platforms⁴⁰. This success is attributed to deliberate, structured approaches to building a creative economy, including strategic investments in infrastructure and policy support. Similarly, South African fashion, film, and video games are increasingly recognized abroad, while local artists and designers sell their work internationally through digital platforms and global exhibitions⁴¹.

While this regional success increases competition, it also opens avenues for collaboration and investment.

As more African countries build globally recognized creative brands, opportunities emerge for cross-border partnerships, joint ventures, and shared platforms that can amplify the reach of Sierra Leonean creatives. Participation in regional festivals, trade shows, and digital marketplaces allows Sierra Leone to tap into established networks, learn from best practices, and attract investment from both within Africa and abroad.

Case Study: Exporting Sierra Leonean Crafts – Aurora Foundation

Aurora Foundation links rural artisans to global buyers through its “Sweet Salone” brand. The Icelandic non-profit works with over 50 artisans to co-create and export textiles, pottery, and accessories — paying upfront and offering design support. While their model boosts livelihoods, export logistics remain a key barrier. Their experience shows how artisan supply chains can be scaled with tailored training and simplified trade facilitation.

See Annex II for full case study.

³⁸ Thomas, A. R. (2023). Sierra Leonean made goods and services competing with imports. The Sierra Leone Telegraph.

³⁹ United Nations. Policy Brief: The African Continental Free Trade Area (AfCFTA)

⁴⁰ Adunyame, F. (2025). Growing Ghana's Creative Industry: Learning from the Nigerian Playbook. Citinewsroom.

⁴¹ South African Cultural Observatory. (2024). Snapshot of the cultural and creative industries in South Africa.

4.2 Barriers affecting the Creative Economy

The development of Sierra Leone's creative economy is shaped by a range of structural and institutional constraints—some of which directly inhibit growth, while others limit the sector's ability to evolve and scale over time. Based on diagnostic findings, these have been categorized as binding constraints—those that immediately inhibit industry development—and non-binding constraints that pose medium- to long-term risks to sectoral sustainability and competitiveness.

Binding constraints

| Policy and regulatory gaps

Policy and regulatory fragmentation remain one of the most critical binding constraints to the growth of Sierra Leone's creative economy. The government of Sierra Leone has made some efforts to strengthen the policy and legal framework to regulate and promote the creative economy as a meaningful contributor to national development, however there remain some significant challenges, most notably a lack of cohesion and coordination, and vision to spark and guide the growth of creative industries.

As noted above, the creative industries fall largely under the remit of the Ministry of Tourism and Cultural Affairs (MoTCA), which is undergoing a strategic restructuring process. The Ministry has commissioned a comprehensive management and functional review, incorporating creative economy considerations into its core structure. As a result, MoTCA is transitioning from two to four directorates, now including a newly established Directorates of Creativity & Innovation, Community Relations, Private Sector, and Monitoring. The restructured model also introduces enhanced functions for monitoring and evaluation, communications, private sector engagement, and community relations. This reform is designed to align with the National Development Plan and supports the Government's overarching goal of generating 500,000 jobs by 2030—recognizing the creative economy as a sector with strong employment potential, especially for youth and women.

MoTCA has actively been implementing several key initiatives to strengthen the creative economy. One flagship initiative is the establishment of Creative Villages—a major private sector-led project aimed at establishing artist residency spaces for thousands of youth across the country. While further details have not yet been made public, the initiative is expected to include dedicated training facilities, production studios, and physical infrastructure to support creative enterprise. Additionally, MoTCA is advancing the

Tourism for All Campaign, which includes themed months such as Creativity and Innovation Month and Culture Heritage Month.

The creative economy is regulated through a patchwork of overlapping mandates across multiple ministries, with weak coordination and limited accountability mechanisms. Aside from MoTCA, other actors include:

- Ministry of Information and Civic Education which is currently leading the development of a National Film Policy to guide, regulate, protect and promote the growing film and performing arts industry.
- Ministry of Youth which establishes the creative arts as a critical component of their National Youth Policy, including initiatives under their Youth at Risk program which involve creative outputs (such as writing competitions, music events, etc.).
- Ministry of Information and Communications who are at the forefront of digital transformation and the integration of digital infrastructure which the creative economy needs.
- Ministry of Trade which oversees the Copyrights Act.
- Ministry of Justice, under which Office of the Administrator and Registrar-General (OARG) who administers intellectual property matters comes under.



Institutional best practices from Nigeria's creative economy

Nigeria's experience demonstrates the benefits of centralized institutional leadership, multisectoral coordination, and strong public-private dialogue. These elements are critical for mobilizing financing, improving policy coherence, and scaling creative industries sustainably.

In 2023, the **Federal Ministry of Art, Culture, and the Creative Economy (FMACTCE)** was established following the merger of two separate ministries—Art, Culture and Creative Economy, and Tourism. Thirteen agencies previously under the Ministry of Information and Culture now fall under the FMACTCE umbrella, consolidating oversight and programming across the creative sector⁴².

This institutional shift coincided with the launch of Destination 2030, Nigeria's creative economy master plan. The Ministry, under the leadership of Minister Hannatu Musa Musawa, aims to expand the sector's GDP contribution to 10 percent by 2030, targeting a total value of USD 100 billion.

The Ministry builds on decades of groundwork by institutions like the **National Council for Arts and Culture** (established in 1975) and the **Nigerian Film Corporation** (established in 1979), which continue to provide specialized support. It has also initiated a revised National Cultural Policy, in collaboration with the **Nigerian Economic Summit Group (NESG)** and UNESCO, to provide updated strategic direction for the sector⁴³.

Finally, the **Creative Economy Development Fund (CEDF)**, a public-private financing mechanism approved by the Federal Executive Council, provides grants, loans, and equity investment to creative businesses⁴⁴. It enables IP-backed lending and risk-sharing structures, aligned with a national pilot for intellectual property monetization.

⁴² INFOMEDIANG. (2024). Agencies of Federal Ministry of Art, Culture, and Creative Economy in Nigeria.

⁴³ Anyanwu, S. (2025). Federal Ministry of Art, Culture, Tourism, and Creative Economy advances national cultural policy review in collaboration with NESG and UNESCO.

⁴⁴ Ministry of Art, Culture and the Creative Economy, Nigeria. (2025). CEDF Roll-Out Strategy Communication.



Despite the existence of the Copyright Act (2011), enforcement and institutional support remain weak. While the Act legally protects literary, artistic, and musical works, its implementing regulations remain in draft. Funding constraints have delayed the establishment of the Collective Management Organization (CMO), limiting the ability of creators to monetize and protect their intellectual property. In this context, Sierra Leone may benefit from exploring a hybrid or more author-centered approach (such as the francophone author's right system), which places greater emphasis on protecting the rights of creators. Integrating elements of the author's right model into the national IP framework could enhance protection, recognition, and remuneration for Sierra Leonean creatives.

Export processes and political economy dynamics further constrain the creative economy's growth. Constraints differ notably between goods-producing and service-based creative subsectors. Creatives involved in physical goods—such as fashion, crafts, and visual arts—face significant challenges, including prohibitive shipping costs, fragmented logistics

networks, and lack of access to structured export platforms or international fairs. Shipping out of Sierra Leone remains costly and inefficient, with small producers often relying on informal travel networks rather than formal logistics channels. These barriers are less relevant for creators of digital or service-based content, such as musicians distributing via streaming platforms or filmmakers sharing content through digital marketplaces. For these creators, constraints are more closely tied to platform access, IP enforcement, and payment infrastructure than to logistics. Creatives also face difficulties meeting international standards, such as consistency, labelling, or quality assurance — limiting their ability to access diaspora or regional markets. Political economy factors compound these challenges: institutional ownership over the creative economy remains fragmented, with overlapping mandates, weak coordination, and limited capacity to implement reforms. While creative industries are often referenced in national strategies, they are not yet prioritized in trade policy, investment promotion, or export support frameworks.

Institutional landscape

Institution	Role	Current Status
Office of the Administrator & Registrar General	Registers trademarks, designs, copyrights	Manual, paper-based, no digital registry
Ministry of Trade & Industry	IP policy leadership	Limited coordination with creative economies
Ministry of Tourism & Cultural Affairs	Creative economy policy, restructuring	Merging cultural & CI policies
Judiciary & Police	IP enforcement	Low capacity, few prosecutions
Law Reform Commission	Legislative updates	Not yet engaged on IP reforms



| Lack of access to digital monetization platforms

Sierra Leonean creatives increasingly use digital platforms to promote their work, but monetization opportunities are extremely limited, constituting a binding constraint to sector growth and income potential. This particularly affects music and audiovisual creatives, who rely on international platforms to reach audiences but remain excluded from revenue systems. The country is not yet eligible for the YouTube Partner Program (YPP), meaning artists cannot earn advertising revenue from their content even if they generate substantial views. YouTube does not publish a list of the precise legal, technical, and business factors that determine whether a country is included in the YPP. However, based on available information and official statements, the following considerations are assumed to play a role:

- **Adherence to International Sanctions:** Countries subject to international sanctions or trade restrictions may be excluded from the program.
- **AdSense Payment Infrastructure:** YouTube relies on Google AdSense to pay creators. The ability to support AdSense payments in local currencies and through local banking systems is essential.
- **Advertiser Demand:** Sufficient local or regional advertiser demand is necessary to sustain a monetization ecosystem.

Beyond YouTube, other digital monetization ecosystems (such as TikTok, Spotify, Apple Music, etc.) also remain inaccessible. Creatives engaged who have established monetized accounts usually only had been able to set these up on the basis that they have bank accounts or other systems established in other countries.

Other African countries have overcome these barriers through ecosystem investments and

adaptive strategies. Kenya and Ghana have invested in mobile money and digital infrastructure, enabling platform integration. Nigerian creators often rely on multi-channel networks or intermediaries abroad to access monetization programs. South Africa has established performance rights organizations and creative business support hubs that facilitate licensing and payment flows⁴⁵. In Rwanda, firms such as InyaRwanda and EA Champs have developed hybrid business models that combine YouTube distribution with alternative monetization approaches—such as local subscription apps, mobile airtime billing, and brand partnerships⁴⁶.

⁴⁵ VicariousLab. (2025). How African creators monetize despite platform restrictions.

⁴⁶ International Trade Centre. (2019). Creative industries in Rwanda: Digital paths to global markets. ITC, Geneva.



| Gaps in IP protection and enforcement

Weak intellectual property protection remains one of the most binding constraints on the growth, monetization, and global integration of Sierra Leone's creative economy, particularly for content-based industries such as music, film, and publishing. While the country's legal framework—anchored in the Copyright Act (2011) and complemented by laws on trademarks (2014) and industrial designs and patents (2012)—provides a preliminary legal foundation, implementation is extremely limited. An analysis of the IP environment can be found in Appendix IV, which is summarized below.

The Collective Management Organization—a legally mandated entity to oversee copyright licensing and royalty collection—remains non-operational until the associated Regulations are in place. These regulations are currently still in draft form, and there is limited mechanism for creators to license their work or collect income from public performance, broadcast, or streaming use. This institutional vacuum leaves most creatives unable to commercialize their IP or participate in national or cross-border licensing ecosystems.

The IP registration system is fully manual, limiting transparency and access. As of early 2025, only 5 copyrights, 8 industrial designs, and 0 patents have been registered nationwide, with trademarks dominating the system at 25,952 registrations⁴⁷. No radio stations are licensed under copyright law. The absence of an online registry or search tool inhibits market confidence and limits data generation for policymaking.

Enforcement is ad hoc and fragmented, with no dedicated IP enforcement unit within the police or judiciary. There are no specialized IP courts or tribunals, and infringement cases rarely result in prosecution. Monitoring mechanisms are nonexistent—there is no metadata tagging, no playlist reporting agreements, and no tracking systems for airplay or live performance. Broadcast and digital usage goes unrecorded, leaving creators with no means to track use or claim royalties.

The absence of an operational IP framework is further compounded by low awareness among creatives. Most are unfamiliar with the benefits of registration, licensing processes, or the commercial value of their intellectual property. Stakeholder consultations and field surveys consistently found that IP rights are either misunderstood or ignored, and many artists choose not to register due to complexity, cost, and lack of trust in enforcement mechanisms.

Without enforceable IP protections, Sierra Leone's creative economy remains excluded from regional and global licensing ecosystems. This constrains the sector's ability to attract finance, participate in cross-border content distribution, or enter into international collaboration agreements.

Best practices and digital solutions for IP management

Strengthening IP and author's rights in Sierra Leone doesn't require starting from scratch. Multiple countries—and even local actors—offer replicable digital tools and institutional models that can improve rights protection, royalty collection, and creator trust.

International best practices:

- **Ghana—GHAMRO:** Established broadcaster licensing system, including audiovisual rights via ARSOG.
- **South Africa—SAMPRA:** Developed a mobile app and metadata tracking tools to monitor usage and streamline royalty collection.
- **Kenya—KECOBO:** Operates a full online copyright registry that allows creators to register works and access records digitally.
- **UK—PRS for Music:** Offers creators access to automated dashboards showing royalty earnings and usage trends.
- **Senegal—SODAV:** State-recognized Collective Management Organization that manages author's rights across music, visual arts, and audiovisual content. It has deployed digital solutions for rights registration, public performance tracking, and royalty distribution, and is considered a reference in West Africa for its transparent governance and regional scope.

Innovation in IP Management:

- **Automation and Workflow Optimization:** When IP assets are digitized, routine tasks such as patent renewals, trademark registrations, and compliance checks can be automated.
- **Blockchain for IP Protection and Transactions:** Blockchain technology is being explored for secure, transparent IP registries, timestamping inventions, and managing IP transactions.
- **New Digital Business Models:** New value-driven models such as pay-per-use, subscription services, and transactional licensing.

⁴⁷ Office of the Administrator and Registrar General (OARG), verified IP registration metrics as of May 2025.

| Limited creative infrastructure

The creative economy suffers from a critical lack of creative infrastructure at every stage of the value chain, representing one of the key binding constraints identified in this diagnostic. There is a shortage of professional recording studios, performance venues, exhibition spaces, and post-production facilities—affecting industries such as music, film, fashion, visual arts, and performing arts. Survey results show that 55 percent of creatives cited limited infrastructure as one of their top three challenges, highlighting the widespread need for investment across the full creative production and distribution value chain. The type of infrastructure needs reported were wide-spread, with the most significant needs being:

- **Reliable digital infrastructure:** Electricity access remains unreliable (as of 2023, 35.5 percent of the population has access to electricity⁴⁸), affecting not only production processes but also digital distribution and online sales. Internet penetration has improved, but stable, high-speed internet necessary for streaming, uploads, and financial transactions (as well as other broader business management activities) remains limited. This disproportionately impacts digitally oriented sectors such as music, audiovisual production, and design services.
- **Training and educational infrastructure:** There are few structured opportunities for skills development in creative disciplines such as music production, digital design, screenwriting, and performance arts. The absence of dedicated creative education programs or institutions limits the pipeline of qualified talent and restricts the growth of professional standards in the industry. While informal learning and peer-to-peer training exist, they are not sufficient to meet the demand for skilled labor or to ensure quality content production.
- **Performance, rehearsal and exhibition spaces:** The lack of appropriate space not only restricts audience engagement but also affects the income-generating potential of live events, exhibitions, and performances.



Geography also plays a critical role in shaping access to the creative economy. The vast majority of support infrastructure—studios, training centers, markets, and policy institutions—are concentrated in Freetown, limiting access for creatives in other towns and rural areas.

Other African countries have addressed this lack of creative infrastructure through creative and low-cost models. In Mali, local entrepreneurs converted residential compounds into functional recording studios using low-tech setups—leveraging basic acoustics, recycled materials, and modular design to lower costs while maintaining quality standards⁴⁹. Nigeria signed a national Memorandum of Understanding with private investors to develop live venues and studios⁵⁰. Kenya established multi-use creative hubs through public-private partnerships⁵¹.

⁴⁸ World Bank Data, Access to Electricity (% of Population) – Sierra Leone, accessed 28 April 2025

⁴⁹ Olivier, Emmanuelle and Pras, Amandine (2023) Creatives Uses of Low Tech in Bamako Recording Studios (Mali). Journal of New Music Research.

⁵⁰ Ukuedojor, M. (2025). FG, Chocolate City Sign MOU on Creative Industry Infrastructure - Agency of Nigeria.

⁵¹ Alliance Française. (2025). Creation Africa - Kenya.

| Limited access to finance

Access to finance remains a major binding constraint for Sierra Leonean creatives, limiting growth, investment, and professionalization. Traditional loan products, based on long-term repayment and fixed asset collateral, are poorly suited to the needs of creative entrepreneurs, who typically require short-term, project-based financing. High levels of informality, limited financial literacy, and lack of structured financial records further complicate access.

A large share of creative activities in Sierra Leone operates informally, with few artists, entrepreneurs, or organizations officially registered. This limits access to financing, government support, and formal market opportunities. Many creatives lack business licenses, tax registration, or formal legal status, weakening their ability to participate in tenders, apply for grants, or negotiate contracts. According to the diagnostic survey, 91 percent of respondents cited lack of access to finance as a top-three constraint—the most frequently reported challenge across all creative industries.

Personal savings remain the primary source of capital, while access to formal financing remains extremely limited. 87 percent of creatives rely primarily on personal savings to finance their businesses. Only 7 percent reported using microfinance institutions, 2 percent obtained bank loans, and 2 percent accessed government grants or subsidies. Use of investment, crowdfunding, and credit from suppliers remains small, but more significant than formal banking channels.

This dependence on informal financing constrains scale, equipment upgrades, and business formalization. Without access to affordable external financing, creative entrepreneurs struggle to invest in upgrading equipment, expanding operations, and formalizing their businesses — severely limiting sectoral growth and competitiveness.

Engagement with financial institutions suggests opportunities to address this gap, but current solutions remain nascent. The 2025 financial institutions workshop revealed a fundamental market failure: many banks lack awareness of the structure, potential, and financial needs of the creative economy. There is limited data to assess creditworthiness, and traditional collateral requirements often exclude creatives who lack fixed assets. Financial institutions struggle to value intangible assets or accept proof of work such as portfolios, contracts, or client feedback. Moreover, creatives often lack formal financial histories or structured business models, reinforcing perceptions of high risk.

Public sector underinvestment in the creative economy further exacerbates financing gaps. As highlighted in the 2021 Needs Assessment for the Safeguarding of Intangible Cultural Heritage (ICH), the MoTCA receives significantly less funding compared to other Ministries, according to the Ministry of Finance and Economic Development Budget allocations. In Financial Year (FY) 2020/21, MoTCA was allocated 6 billion Leones of funding⁵², compared to 13.6 billion Leones for the Ministry of Youth (a -126 percent difference) and 11.4 billion Leones for the Ministry of Sport (an -89 percent difference).

⁵² Old leones



Non-Binding constraints

| Limited data on the creative economy

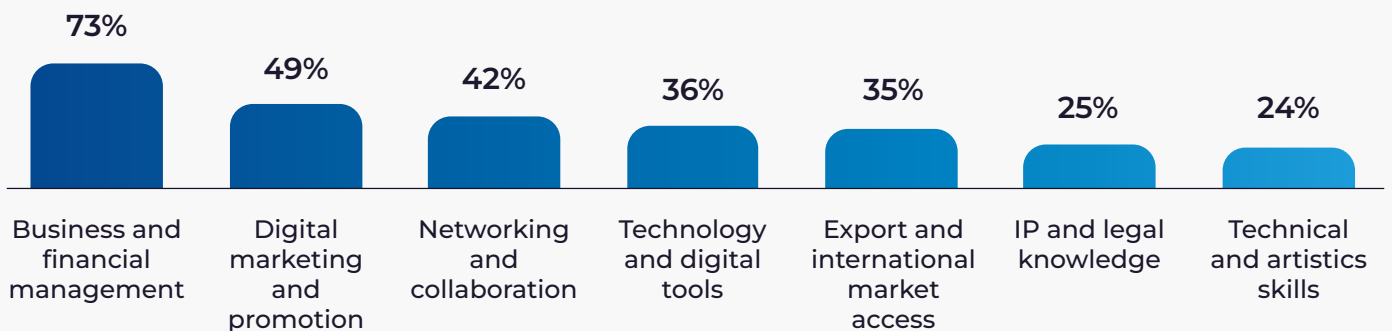
One foundational challenge —though not considered a binding constraint— is the absence of consistent, disaggregated data on the creative economy. At present, there are no standardized creative industry codes embedded in national statistics systems, and creative economy data is not systematically captured through labor force, GDP, or enterprise surveys. This data gap limits the government's ability to effectively prioritize, plan, and allocate resources for the economy. It also constrains the ability of development partners, private investors, and financial institutions to assess market opportunities, monitor performance, or design targeted interventions. For an industry that spans both informal and formal activity, reliable data is essential to inform policy development, track employment and value creation, and strengthen institutional coordination across ministries and agencies.

| Skills gaps and limited formal training

Although talent is abundant, most creative workers are self-taught. Formal training institutions like Ballanta Academy, and other key stakeholders like Aurora Foundation, and Creative Hub Africa provide important services, but their reach remains limited, particularly outside the capital. Survey findings illustrate the scale of the training gap: 44 percent of surveyed creatives reported having received training through workshops or mentorship programs, while 36 percent reported no formal or informal training at all. Access to formal qualifications remains limited, with 27 percent completing certification courses, 22 percent obtaining a university degree, and only 7 percent completing online courses. While skills gaps constrain quality and market competitiveness, they do not fully prevent the sector from functioning — making this an important but not binding constraint.



Figure 7. Most commonly cited skills gaps



Source: Creatives Survey (2025)



Case Study: Grassroots Creative Education – Ballanta Academy

Ballanta Academy is one of Sierra Leone's few formal creative training institutions. Founded in 1995, it offers low-cost music and dance education to around 40 students in Freetown, supported by a small team of passionate tutors. Despite severe funding constraints, it has helped train artists like Drizilik. Ballanta demonstrates how community-driven models can keep creative education alive — but highlights the urgent need for national certification systems and curriculum support.

See Annex II for full case study.

| Gender inequalities in creative opportunities

While not classified as binding constraints, women in Sierra Leone's creative industries face systemic barriers that limit their participation, and leadership, and access to resources. These constraints include societal norms, safety concerns, limited access to finance, and underrepresentation in decision-making roles. An analysis of gender inclusion is included in Annex V, and is summarized below. The most critical barriers include:

- **Societal restrictions, cultural norms and attitudes,** with women creatives' works usually being stigmatized as either a hobby or "side hustle" which discourages many women from committing to the creative industry as a career. These stigmas also often pigeonhole women into supportive roles as opposed to leading roles.
- **Limited representation of women in decision-making positions.** Conversations with creatives confirmed that there are more men in senior creative positions, decision making and executive roles than women. As a result, there is a general lack of mentorship and support for emerging women creatives which limits their professional advancement opportunities and worsens the systemic inequalities.
- **Dominance in some industries over others.** Many women in Sierra Leone are making great strides in the fashion industry, crafts and culinary arts while men dominate industries such as technical visual arts, filmmaking and production. In the music industry, women mostly occupy supportive roles such as choreographers, secondary vocalists, and dancers, with limited access to positions like producers or bandleaders—roles often perceived as masculine⁵³. These structures further marginalize women, isolating them and restricting them to industries considered "feminine".

- **Exposure to harassment, intimidation, and unsafe working conditions compounds these challenges.** Gender-based violence affects women in the entire creative value chain both online and offline, worsened by the prevalence of informal and unregulated environments.

Amidst these challenges, several organizations are spearheading impactful initiatives to promote gender inclusion. Organizations such as Creative Hub Africa (CHA), Salone Film Union, and PEN Sierra Leone are expanding access to training, visibility, and professional networks for women. These efforts complement ongoing *World Bank analytical work—including the We-Fi WeTour Women in Tourism Enterprise Survey*⁵⁴—which seeks to better understand gendered barriers in tourism-linked sectors.

Establishing safe and inclusive creative hubs is essential to dismantling systemic and socio-cultural barriers that affect women and marginalized groups. These hubs can foster collaboration, mentorship, and visibility. Key enablers include accessible infrastructure (e.g., shared multipurpose venues equipped for music, visual arts, fashion, and film), supportive policy frameworks (e.g., IP enforcement, anti-harassment protocols), and targeted training programs.

Case Study: Gender-Inclusive Creative Space – Creative Hub Africa

Creative Hub Africa (CHA) provides safe, inclusive infrastructure for women and youth. Founded by fashion designer Isatu Harrison, CHA offers digital skills, mentorship, and monthly pop-up markets. It supports female creatives across fashion, culinary arts, and music — helping bridge gender gaps in training, visibility, and workspace access. Its member model makes infrastructure affordable and sustainable.

See Annex II for full case study.

⁵³ Tabak C. (July 2023). Gender and Music: Gender Roles and the Music Industry. *World Women Studies Journal*.

⁵⁴ Twining-Ward, L. (2019). *We-Fi WeTour Women in Tourism Enterprise Survey 2019*. World Bank.



5. Value Chain Analysis of the Music Industry

5.1 Industry selection rationale

The music industry was selected for value chain analysis based on its creative intensity, economic footprint, ecosystem development potential and to tangibly showcase many of the broader policy and regulatory issues facing the creative industries in Sierra Leone. Quantitative analysis identified music as one of Sierra Leone's top five creative industries, contributing 9.1 percent to Sierra Leone's creative economy⁵⁵. It is classified as a creative stronghold, with most roles falling under core creative occupations, particularly with regards to sound recording and music publishing activities.

The music industry has strong foundations for building collaborative networks, co-creation platforms, and cross-sector value chain linkages — critical assets for future ecosystem development. The survey findings suggest that music creatives collaborate more frequently with other stakeholders compared to other creative industries. Among surveyed musicians, 33 percent reported collaborating frequently (more than twice a month) and 56 percent occasionally (once or twice a month). In contrast, among all creative industries combined, only 20 percent reported frequent collaboration and 29 percent occasional collaboration. This higher level of engagement indicates that the music industry already has stronger foundations for building collaborative networks, co-creation platforms, and cross-sector value chain linkages— which are critical assets for future ecosystem development.

Stakeholder consultations confirmed the music industry's strategic potential, though it remains relatively under-supported compared to other industries. Unlike fashion—which has benefitted from dedicated donor programs and access to microfinance—music lacks consolidated financing mechanisms, institutional anchors, or formalized training and production infrastructure.

Beyond its economic value, the music industry holds important social potential in societies navigating histories of division and inequality, like Sierra Leone. Music can serve as a powerful tool for reconciliation, community healing, and national unity. For example, in the former Yugoslavia, music played a significant role in both exacerbating and healing divisions—facilitating the construction of shared identities and supporting reconciliation processes in the aftermath of violent conflict⁵⁶. Similarly, research from post-war Sri Lanka demonstrates that inclusive music development initiatives, such as intercultural music festivals, provided shared spaces for divided groups to connect, enabling learning, collaboration, and healing across ethnic and cultural lines⁵⁷. In Sierra Leone—where nearly 40 percent of the population is aged 18–34⁵⁸—music offers a particularly important platform to engage youth, promote social cohesion, and contribute to a shared national narrative following conflict and fragmentation. It has historically served as a potent medium for civic education, electoral mobilization, and peacebuilding—amplifying messages around reconciliation, anti-corruption, and social justice. Artists have been instrumental in fostering dialogue, healing, and unity, particularly through community-centered campaigns and messages that resonate deeply with everyday lived experiences⁵⁹.

⁵⁵ Estimates based on Sierra Leone GDP Data 2023 using the applied methodology; ISIC (Revision 4).

⁵⁶ Mozara, Z. (2015). *The Role of Music in the Conflict: Tool of Reconciliation or a Deadly Weapon*. Berlin: Institute for Cultural Diplomacy.

⁵⁷ Howell, C. (2019). Music development and post-conflict reconciliation in Sri Lanka. In *Kunst og konflikt*.

⁵⁸ Census Survey, 2015

⁵⁹ Sallieu, I. (2021). *Sierra Leone: Music As An Effective Tool To Lasting Peace*. Pan African Visions.

The music industry offers growing opportunities to generate export earnings by tapping into regional and diaspora markets. The global demand for African music is accelerating, supported by the rise of digital platforms and diaspora-based consumption. According to Spotify's 2024 Loud & Clear report, Nigerian artists earned over USD 38 million in global royalties—more than doubling 2023 earnings and representing a fivefold increase since 2022. South African artists similarly earned nearly USD 21 million, with indigenous language music driving dramatic gains⁶⁰. Beyond revenue, this boom is deeply connected to the diaspora's cultural demand. As documented in DJ Mag⁶¹, African artists working in the diaspora describe how music from “back home” provides identity, belonging, and pride.

Before streaming platforms, diaspora communities relied on burned CDs and word-of-mouth to access local music. Now, digital access has transformed consumption habits, allowing artists and listeners alike to bridge continents through shared sounds. Sierra Leonean-American DJ and cultural producer Chief Boima, for instance, notes how diaspora artists use music to recreate communal spaces abroad, fostering global cultural flows rooted in African creativity.



⁶⁰ Obi, I. (2025, April 8). Artists Across Sub-Saharan Africa Achieve Record-Breaking Fiscal Year on Spotify. Rolling Stone Africa.

⁶¹ Kariisa, J. (2022, April 27). How the Global Boom of African Music Is Resonating with Electronic Artists in the Diaspora. DJ Mag.

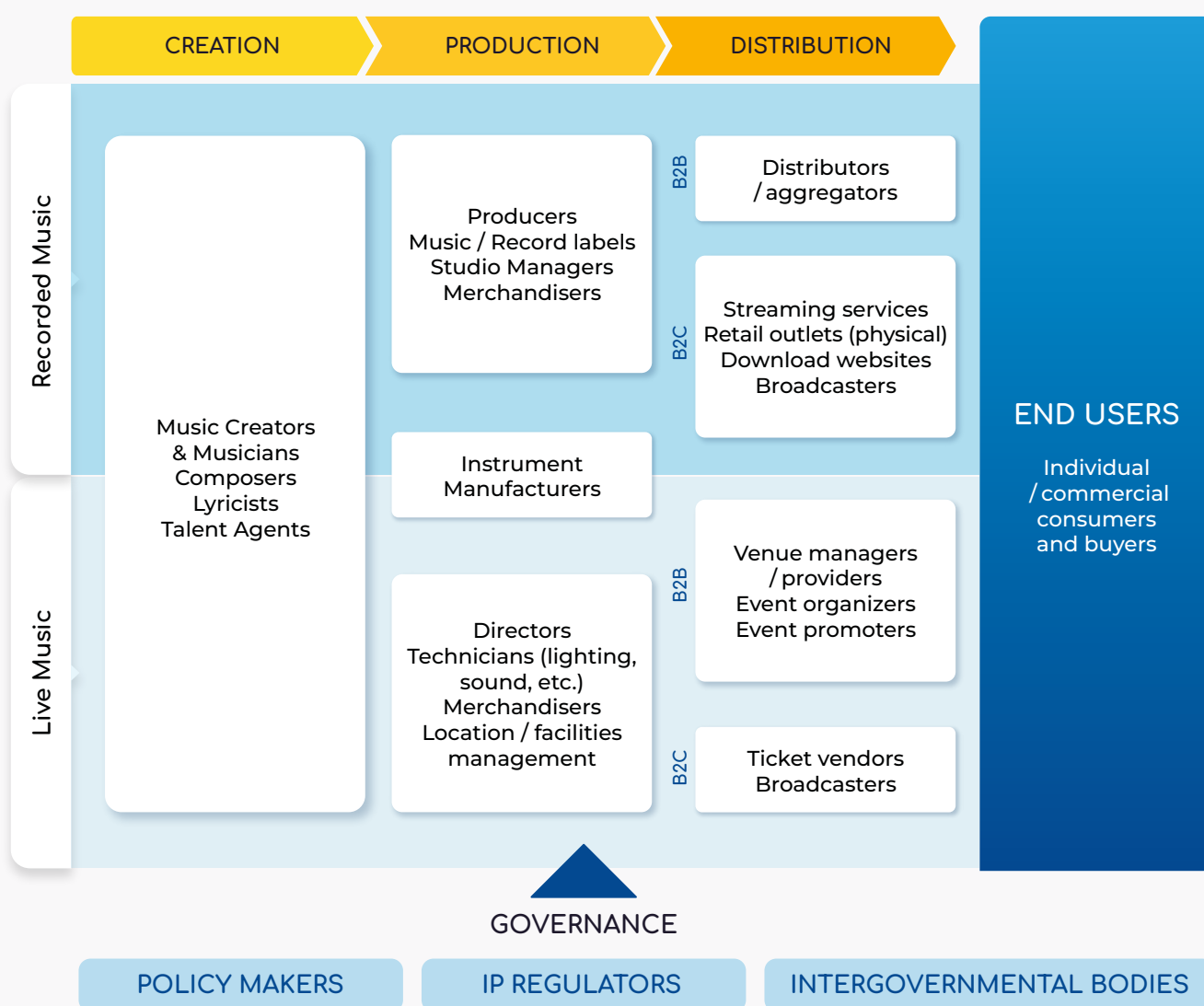
5.2. Value chain mapping

The music industry in Sierra Leone is structured around two interconnected value chains: recorded music and live music. At the creation level, both streams rely on similar contributors: music creators, composers, lyricists, and talent agents. However, they diverge in how music is produced and delivered to audiences. In the recorded music chain, works move from creators to financial producers or record labels, studio managers, and merchandisers. Distribution then unfolds in two levels: first, B2B distributors or aggregators—intermediaries that facilitate the upload and management of music content onto digital platforms—supply content to service providers; second, B2C channels—such as streaming services, download websites, physical retailers, and broadcasters (radio, TV, and social media)—make the content available to final consumers. In live music, production involves directors, technicians, location

and facilities managers, and merchandisers. The distribution side includes B2B actors such as venue managers, event organizers, and promoters who coordinate performances, and B2C channels such as ticket vendors and broadcasters who connect events directly to audiences.

In practice, however, there is limited role specialization in Sierra Leone's music ecosystem, and many stakeholders operate across multiple phases of the value chain. Individuals may simultaneously act as talent managers, music producers, event organizers, and even distribution facilitators. Similarly, artists may be responsible for composing, producing, marketing, and distributing their work, reflecting the underdeveloped institutional landscape of the industry.

Figure 8. Sierra Leone's Music Industry Value Chain



Source: Consultants' Analysis

The music industry is one of the most creative job-intensive industries in Sierra Leone, contributing significantly to employment and value creation within the creative economy. According to high-level estimations using GDP and data from the 2022 Census of Establishments, the industry contributes approximately 9.1 percent of creative economy GDP and supports around 1,826 formal jobs, though the true workforce—including informal and freelance roles—is likely much higher. The music industry was classified as a “creative stronghold” under the World Bank’s creative intensity methodology, meaning that core creative occupations—such as performance, songwriting, and production—account for a high share of total employment within the industry. These findings position music as both culturally central and economically strategic in Sierra Leone’s creative landscape.

The industry also demonstrates comparatively strong collaboration patterns, supporting a dynamic and interconnected ecosystem. Survey findings show that 33 percent of musicians collaborate with other creatives more than twice per month—the highest reported rate among creative industries—while an additional 56 percent reported occasional collaboration. These patterns of engagement reflect an active, networked community with potential to scale through co-creation, cross-sector initiatives, and regional export strategies.

However, gaps in intermediary services (especially booking agencies, music publishers, and rights administrators) limit the value chain’s efficiency and scalability. Unlike more developed ecosystems such as Senegal, Sierra Leone lacks booking agencies



that serve as connectors between artists and promoters or venues, resulting in fragmented and informal arrangements that hinder both local performance opportunities and international touring. The absence of music publishers also restricts artists’ ability to monetize compositions through advances, licensing, or royalty collection. Further missing links include professional tour managers, music licensing agents, and formalized collective management organizations capable of enforcing copyrights and collecting royalties. These gaps reduce artists’ earning potential and discourage private investment. Addressing them through institutional support, training, and targeted investment could unlock untapped commercial value and enhance the sector’s contribution to job creation and regional export.

Survey evidence confirms that structural constraints compound these missing links and reinforce informality. Respondents identified four binding constraints across the music value chain: (i) insufficient access to finance; (ii) inadequate infrastructure and equipment; (iii) limited distribution and monetization channels; and (iv) barriers to obtaining and enforcing intellectual property rights. These barriers affect both recorded and live music streams and reinforce the industry’s dependence on informal practices. Many creatives operate outside formal systems, which limits their ability to access finance, protect their work, or benefit from public support mechanisms. There is also a widespread hesitation to formalize, as the process is often perceived as complicated, costly, or offering limited immediate benefits. Without structural interventions to address these constraints, the music industry’s capacity to contribute to formal employment, entrepreneurship, and export development will remain underutilized.



| Access to finance

The core financial constraint in Sierra Leone's music industry is not just a lack of capital, but limited monetization opportunities that result in unpredictable and insufficient revenue streams. Artists and producers struggle to generate stable income due to limited access to digital monetization platforms, and inadequate enforcement of intellectual property rights. This revenue instability makes it difficult to plan, invest in quality production, or approach lenders with a compelling business case.

Music production requires upfront costs for recording, promotion, and performance—but artists lack access to financing instruments tailored to the industry's revenue model. While capital needs exist across creative industries, music-specific costs—such as studio time, mixing/mastering services, live event setup, and digital marketing—often occur well before any income is earned.

| Infrastructure and equipment

Limited access to appropriate infrastructure significantly constrains music production and performance in Sierra Leone. Stakeholders identified a severe shortage of dedicated spaces for rehearsals, performances, and music production. For example, Ballanta Academy's 80-seat auditorium is one of the few established venues available in Freetown.

The high cost of importing professional music equipment makes it difficult for studios and artists to access the tools necessary for competitive production. While importing equipment is standard practice in many creative economies, in Sierra Leone the main constraint is not import dependency itself but the high costs and import duties associated with bringing in musical instruments, recording equipment, and sound engineering tools. This raises the capital threshold for entry and discourages investment in studio capacity. Market interviews noted that most professional-grade equipment is sourced from the United Kingdom, United States, or China, but only a few studios can afford such purchases.

A lack of domestic service providers and distribution channels for music equipment reflects underlying market failures in supporting creative industries. In more developed contexts, the private sector supplies rental services, maintenance support, and retail access to production tools. In Sierra Leone, these services are nearly absent, reflecting both low effective demand (linked to limited monetization potential) and high barriers to market entry. This gap restricts access not only to technology but also to the ecosystem required to maintain and upgrade equipment over time.





The current infrastructure and equipment landscape reinforces inequality in access and limits the industry's ability to scale to export standards.

Basic recording setups are increasingly common in informal or home studios, but they often lack the quality needed for commercial-grade production. While there are a few notable private efforts—such as Cribs International's investment in digital mixing technologies—these are isolated cases rather than indicators of broader industry readiness.

| IP rights and management

Unregulated public and private use of music is widespread, reinforcing a culture of unpaid consumption and limiting the ability of both artists and producers to generate income.

In the absence of an operational licensing system or monitoring tools, music is played by DJs, in retail spaces, and at public events without compensation. Equally, music piracy for private use—through unauthorized sharing of downloaded or streamed content—is common. These practices reflect broader norms around the free use of creative content and contribute to the perception that music is a public good rather than a commercial product.

Moreover, under the current copyright framework, rights and revenues tend to favor producers and rights holders rather than creators themselves, leaving most artists with little to no control over how their work is used.

From a value chain perspective, this imbalance further distorts revenue distribution and discourages long-term investment in talent development. As such, reforms to the IP system should explore author-centered approaches to ensure that creators are adequately recognized and compensated. Without stronger enforcement, clearer rights frameworks, and public awareness, these structural issues will continue to undermine the emergence of a viable music economy.

| Distribution and monetization

Digital platforms are the primary means of music distribution in Sierra Leone, but monetization remains severely limited. Survey results show that 89 percent of music creatives use the internet as their main distribution channel, particularly platforms like YouTube and TikTok, which are used to share videos, songs, and promotional content. However, Sierra Leone is not part of the YouTube Partner Program, and artists cannot earn advertising revenue from views, even when their content gains regional or international traction.

The lack of local monetization infrastructure, combined with unreliable internet access and energy supply, restricts musicians' ability to generate revenue online. Limited broadband coverage and frequent power outages reduce audiences' access to streaming services and restrict musicians' ability to manage content, upload media, or receive digital payments. These challenges are compounded by a general mistrust of digital platforms and concerns over content theft, which discourage full use of available online tools. In this environment, digital distribution serves more as a promotional channel than a commercial one.

Offline channels such as live events and personal networks remain central to music distribution but offer inconsistent and informal revenue opportunities. Seventy-eight percent of surveyed musicians cited events as a major distribution and income source. However, the financial returns from live performance are often modest, sporadic, and unstructured, with no guarantee of consistent work or compensation. Most artists rely on informal networks to secure gigs, which limits scalability and leaves them vulnerable to non-payment.

Together, these conditions create a fragmented and precarious income model for musicians, where audience reach does not guarantee financial sustainability. Without access to monetized digital platforms, a robust live events market, or structured performance contracts, many artists are unable to earn enough to sustain a full-time music career. As a result, music often remains a secondary pursuit or side activity, limiting professional development and the industry's overall economic contribution.



5.3 Skills and training

Sierra Leone's music industry lacks a structured system for professional skills development, limiting the growth and formalization of the sector. The current landscape is characterized by informal learning pathways and a near-absence of specialized technical training institutions. According to survey data, 44 percent of musicians reported having received no formal or informal training related to their music careers. This reflects deep gaps in the availability and accessibility of music education nationwide.

Formal training opportunities are limited to a small number of institutions with minimal reach. Ballanta Academy of Music and Performing Arts is the most prominent example, providing foundational instruction in music, dance, and theatre. Founded in 1995, the academy supports approximately 40 students annually and relies on modest government subventions, community support, and occasional grants. Its scale and resources are insufficient to meet the growing demand for skills development in performance, production, and music business.

There are no nationally recognized certification programs, regional training hubs, or tertiary-level music education options. The absence of specialized academies, technical curricula, or university-level courses in music production, sound engineering, or music rights management constrains the creation of a skilled and competitive music workforce. Without decentralized training infrastructure, young people outside Freetown have little access to structured learning, reinforcing geographic disparities in opportunity and weakening the broader talent pipeline.

These capacity gaps leave artists without the tools to navigate the business side of music and limit the industry's contribution to economic development. Lacking training in production, digital distribution, intellectual property, and internationalization, most musicians are unprepared to engage with formal markets or pursue monetization opportunities. This undermines professional growth, discourages investment, and limits the potential of the music industry to contribute meaningfully to employment and value creation.

5.4 Cross-sectoral linkages

The music industry is deeply interconnected with other creative and service industries, creating opportunities for mutual visibility and income generation. Artists frequently collaborate with fashion designers, videographers, event managers, and choreographers, with music serving as a core driver of demand across these industries. These linkages reflect both cultural and commercial interdependencies that extend music's reach beyond performance and audio recording.

Fashion is closely linked to music through performances, videos, and festivals, where visual presentation and identity are critical to branding. Musicians often serve as platforms for showcasing Sierra Leonean fashion, with designers gaining exposure through music videos and live events. These synergies also contribute to aesthetic innovation and promote national cultural expression.

The film and audiovisual industry supports music through video production and soundtracks, though collaborations remain small in scale and largely informal. Most musicians rely on freelance videographers for music videos, and partnerships for film soundtracks are emerging but not yet widespread. The absence of structured platforms or funding for joint projects limits the scale and quality of these collaborations.

Music performances stimulate activity in tourism, hospitality, and event management, though coordination across sectors is limited. Music festivals and concerts attract diaspora audiences and drive demand for event spaces, logistics, catering, and accommodation. However, interviews suggest that artists and service providers often work in silos, with limited opportunities for joint planning or bundled offerings that could create greater economic value.

Despite natural synergies, collaboration across creative industries is hindered by fragmentation and the absence of institutional mechanisms for coordination. Most professionals operate in isolation or within small informal networks, with few structured forums or incentives for cross-sector engagement. This lack of integration prevents co-branding, shared infrastructure, and bundled service delivery—such as packaging music performances with fashion exhibitions, craft fairs, or culinary events—and limits the ability of the music industry to expand its economic footprint.



Examples of successful cross-sector collaborations

Cross-sector collaboration within the creative industries is a proven driver of innovation, cultural impact, and economic growth. Below are concrete examples that illustrate how music, fashion, film, tourism, heritage, and technology sectors can synergize to amplify their reach and value:

- Gnaoua Festival, Morocco:** It brings together traditional Gnaoua musicians with artists from diverse genres and backgrounds. This event fosters cultural dialogue and preserves ancestral traditions while promoting innovation, making the festival a vibrant platform that bridges music, cultural heritage, and other creative industries such as art, crafts, and tourism. Economically, the festival significantly boosts local commerce; during the event, Essaouira's population swells from approximately 80,000 to over 250,000, leading to substantial revenue for local businesses such as restaurants and hotels⁶². Moreover, every dirham invested in the festival yields a return of 17 dirhams, equating to an annual contribution of about 23.9 million USD to Morocco's economy⁶³.
- SXSW Festival:** Originally a music festival, SXSW (Austin, USA) now integrates music, film, interactive media, and fashion, providing a platform for artists, designers, and tech innovators to collaborate, reach new audiences, and experiment with co-creation. In 2023, SXSW attracted approximately 345,000 attendees over nine days, generating an economic impact of 380 million USD for the city of Austin⁶⁴. This figure includes 234.1 million USD from attendee spending, 88.7 million USD from operational expenditures, and 58 million USD from festival partners⁶⁵.
- Vodun Days, Benin:** Launched in 2024, Vodun Days is the first international event dedicated to Vodun spirituality, arts, music, and cultural heritage. The 2025 edition drew more than 435,000 visitors in just three days, energizing small businesses and attracting attention from all over the world.
- Historic venues as performance spaces:** In the UK, restored historic buildings like St George's Hall (Bristol) have been repurposed as music and cultural centers, blending heritage conservation with creative programming. Festivals at heritage sites (e.g., Powderham Castle) further illustrate the intersection of music, history, and event management.
- TRACE (TRANSitioning to a Circular Economy with creative artists) project, UK:** Scientists, musicians (notably the SÓN orchestra), artists, and primary schoolchildren worked together to create original musical performances and art exhibitions focused on e-waste. The project aimed to raise public awareness about the challenges of e-waste and the potential of circular economy solutions. The initiative included workshops, performances, and exhibitions, culminating in a significant rise in audience awareness: 99 percent reported increased understanding of e-waste issues, and 70 percent indicated intentions to change their disposal habits. The project was recognized with the 2021 MRW National Recycling Awards for Campaign of the Year.

⁶² Lechheb, I. (2024). 25th Gnaoua and world Music Festival kicks off in Essaouira to large crowds and Moroccan percussions. Hespress.

⁶³ Ramy, O. (2024). Cultural Immersion Through Festivals Boosts Region's Experience Economy. The Dyorama.

⁶⁴ Kinser, M. (2025). Local businesses share insights on the impact of SXSW. The Daily Texan.

⁶⁵ Swiatecki, C. (2023). SXSW's \$380M economic impact shows return to prepandemic heights. Austin Monitor.

6. Strategic Directions and Transformation Pathways

6.1 Strategic vision for the creative economy in Sierra Leone

Whilst the sector faces significant constraints, Sierra Leone's creative economy presents substantial opportunities for market-driven growth if the right foundations are laid. To unlock this potential, Sierra Leone must focus on removing key constraints while simultaneously laying the foundation for scalable growth. This requires an integrated reform roadmap—combining policy, finance, infrastructure, and ecosystem development—to transition from fragmented activities to a structured, resilient sector. Building on lessons from other countries and inputs from local stakeholders, this roadmap focuses on seven key priorities:

- 1. Policy Structure and Guidance:** A clear and coordinated national policy framework is needed to align ministries, formalize cross-sector collaboration, and create a shared vision for the creative economy. This includes launching a Creative Economy Council with working groups for fashion, film, music, publishing, and crafts, and allocating dedicated public resources to implement sector-specific priorities.
- 2. Unlocking Digital Monetization:** Through regional cooperation with ECOWAS, the African Union, and strategic partners like Nigeria, Sierra Leone can negotiate platform inclusion with global players like YouTube and Spotify. For instance, in the music industry, this would allow creatives to directly monetize streams and generate revenue through digital ads, subscription royalties, or fan-based support. These gains can also extend to e-book publishing and digital film distribution.
- 3. IP Infrastructure and Management:** Ensuring that regulations are in place so that the proposed CMO can effectively manage and monitor IP

systems, including registration, enforcement, and awareness, ensuring creators can benefit economically from their work. This includes integrating key elements of the author's rights model within the IP regulatory framework to provide stronger protection for individual creators and promote fairer value distribution across the CE.

- 4. Infrastructure Development:** Private (or public-private) investment is needed for performance venues, rehearsal / production studios, educational hubs and digital infrastructure, with a focus on inclusive hubs that cater to women and young people to ensure that vulnerable communities are not marginalized. This infrastructure is particularly critical for sectors like film (e.g., post-production facilities, public screening venues, formal film schools), music (e.g., recording studios, performance venues, rehearsal spaces), and fashion (e.g., shared production centers, specialized machinery, affordable training spaces).
- 5. Formalization of Businesses:** Encouraging creatives to register and formalize their businesses can open access to financing, training, grants, and legal protections, while also improving the sector's visibility in national statistics. However, formalization must go beyond business structures to reflect the realities of artists and technicians, who often work independently or on short-term contracts. In line with UNESCO's recommendations⁶⁶, a dedicated "status of the artist" should be introduced to ensure self-employed creatives benefit from legal recognition, social protection, and tailored support mechanisms.

⁶⁶ UNESCO. (2023). Methodological Guide for the Participatory Development of a Law on the Status of the Artist.



- 6. Expanding Access to Finance:** Tailored instruments such as cash-flow-based lending, matching grants, leasing, and credit guarantee schemes should be designed to meet the specific needs of creative medium and small-sized enterprises (MSMEs). Public-private financing facilities, incubation programs, and regulatory sandboxes can accelerate rollout and uptake.
- 7. Cross-Sector Collaboration:** Linking music, fashion, film, crafts, and tourism can produce bundled cultural offerings that attract wider audiences and drive economic impact. For example, linking crafts and fashion to restaurant design, hotel decor, and festival curation offers untapped synergies.

Sierra Leone's creative economy roadmap is ambitious but feasible, with early reform efforts demonstrating government willingness and capacity to act. Although implementation capacity remains a known challenge, there are clear signs of reform readiness that support the roadmap's viability. The Ministry of Tourism and Cultural Affairs is undergoing a structural reorganization to embed creative economy functions at the directorate level—an important institutional shift. Flagship initiatives like the Creative Villages project are already being rolled out to expand access to training and infrastructure for young creatives. In parallel, a National Film Policy is under development, while other ministries (e.g., Youth, Information, Trade) are increasingly integrating creative industry activities into their programs. These targeted efforts reflect broader public-sector reform momentum in tourism, digital transformation, and youth employment, which can be leveraged to support implementation of the proposed roadmap.



The structuring of Sierra Leone's fashion industry

Among Sierra Leone's creative industries, fashion has made notable progress toward sector-wide organization, offering important lessons for other creative fields seeking greater structure and visibility.

A key milestone was the creation and official launch of the **Fashion, Design and Textiles Association (FDTA)** in June 2024. The launch event, hosted by the British High Commission and supported by Invest Salone, marked an important step towards building a collective platform for the sector. The Association brings together designers, tailors, textile producers, and other stakeholders with the aim of promoting industry collaboration, strengthening business practices, and enhancing the industry's competitiveness both locally and internationally.

Although Sierra Leone's fashion and textiles industry remains small compared to larger regional markets such as Nigeria and Ghana, it represents a significant part of the country's creative economy, contributing approximately **Le 680 million** (about USD 30 million) to GDP in 2023. In contrast, Nigeria's fashion market reached an estimated USD 1.31 billion in 2023⁶⁷, while Ghana's industry generated apparel revenues of about USD 109.8 million in 2022⁶⁸, representing 0.4 percent of its GDP.

One of the Association's early initiatives has been the organization of the **first-ever Freetown Fashion Week** in April 2025. This event provides a platform for Sierra Leonean designers to showcase their work, foster collaborations, and raise the visibility of the country's emerging fashion industry.

While the industry continues to face significant challenges — including limited technical skills, constrained access to international markets, and infrastructure gaps — the launch of the FDTA represents a critical starting point for building sector capacity and identity. The fashion industry's recent experience highlights how early steps toward formalization, collective action, and strategic promotion can create momentum for broader creative industry development.

As such, fashion offers a **model for how other creative industries in Sierra Leone could approach sector strengthening**, by focusing on association building, skills upgrading, and market access initiatives.

⁶⁷ Dan-Awoh, D. (2023, August 20). Nigeria, Egypt to lead Africa's fashion market with \$2.5B revenue. Nairametrics.

⁶⁸ Nyarko, J. A. (2022). History of the fashion industry in Ghana. SSRN Electronic Journal.

6.2 Short, medium and long-term actions

To implement the strategic vision, a phased and sequenced roadmap of short-, medium-, and long-term actions is needed—tailored to Sierra Leone's

context and the maturity of its creative economy. The roadmap presented below offers a consolidated view of actions across key pillars.

Figure 9. Strategic actions to strengthen the creative economy

	Policy Structure	Digital Monetization	IP Infrastructure	Infrastructure Development	Access to Finance	Business Formalization	Cross-Sector Collaboration
SHORT TERM (1-2 YEARS)	- Establish National Creative Economy Policy - Establish cross-ministry Creative Economy Council	- Engage monetization platforms to define eligibility criteria - Conduct readiness gap analysis	Finalize Copyright Regulations	- Map infrastructure needs, inc. digital and educational - Assess private investor needs	Co-develop short-term, project-based financial tools via sandbox testing	- Promote business formalization - Pilot a "Status of the Artist" legal framework	Pilot bundled offerings linking music to fashion, tourism and hotel sourcing
MEDIUM TERM (3-5 YEARS)	Allocate public budget for priority creative industries	Facilitate partnerships with telecoms / fintech to improve mobile payments	Strengthen capacities of the CMO to manage IP registration	Establish public private partnerships to develop priority creative infrastructure	- Establish CE Fund - Pilot incubator-accelerator program tailored to CE MSMEs	Launch simplified licensing scheme	- Develop creative-tourism partnerships - Integrate music and film into destination branding
LONG TERM (5+ YEARS)	- Review policy to further integrate CE into national development planning - Film & Animation Growth Scheme	Develop full monetization and rights mgmt ecosystems (e.g., verified creators)	- Establish digitized and accessible national IP registry - Run public education campaigns on IP rights	- Support technical equipment and use (capacity building) - Set up programming budget	Scale export-oriented incubation platforms (e.g. fashion-to-diaspora)	Introduce national certification frameworks to build market credibility	

Source: Consultants' Analysis

| Policy structure

A coordinated national policy framework is the foundation for unlocking Sierra Leone's creative economy. In the short term, establishing a National Creative Economy Policy and a cross-ministry Creative Economy Council is essential to unify fragmented efforts and provide clear strategic direction. This Council should be formally established under the Ministry of Tourism and Cultural Affairs, with high-level representation from the Ministry of Trade and Industry, Ministry of Youth Affairs, Ministry of Information,

Sierra Leone's National Investment Board (NIB), and city councils. The Council should meet quarterly and operative five permanent working groups (fashion & textiles, audiovisual, crafts, publishing, and music) tasked with setting priorities, coordinating donor and private-sector efforts, and drafting annual action plans. For example, the audiovisual group could coordinate initiatives for film permits, post-production infrastructure, and training for directors.

Allocating public resources and institutionalizing creative economy support can help address market failures and unlock sectoral growth.

To catalyze private investment and overcome binding constraints—such as limited access to finance, infrastructure gaps, and underdeveloped IP systems—there is a need to dedicate targeted public resources to the sector. Establishing a Creative Economy Fund, potentially managed by a national investment or coordination entity, could be an effective vehicle to support creators, firms, and ecosystem enablers. While the precise allocation of funding would require further analysis, priority areas could include: direct support to creators and entrepreneurs, co-financing for creative firms and infrastructure, and investments in sector monitoring and evaluation. Funding could be sourced from a mix of public tourism budgets and private-copying revenues.

Integrating the creative economy into national and urban development plans will ensure long-term policy prioritization and market relevance.

The next Medium-Term National Development Plan should include specific goals—such as the number of formal creative jobs to be created and the percentage of increasing creative exports. City councils in Free-

town, Bo, Kenema, and Makeni should be tasked with designating creative districts and offering simplified licensing and infrastructure support for businesses and individuals in crafts, and fashion.

Piloting a flagship sector program will demonstrate early wins and validate the broader policy package.

The audiovisual sector offers a high-impact entry point due to its employment potential and strong linkages with other creative industries. A Film & Animation Growth Scheme should be launched under the Creative Economy Council, in partnership with the Sierra Leone Film Council (SLFC), the Sierra Leone Film Guild, and the emerging Salone Film Union (SAFU). The scheme would streamline permitting processes, offer financial incentives such as a 25 percent rebate on qualifying local expenditure, and coordinate skills development across sector actors. SAFU's ongoing engagement with government and advocacy for the National Film Policy makes it a strategic partner for implementation. The scheme should also promote collaboration across creative industries—for example, textile designers from the fashion sector for wardrobe, writers from the publishing industry for scriptwriting, artisans for set design, and musicians for scoring and sound production.

South Africa's film incentive model

South Africa offers a strong example of how a national incentive scheme and a dedicated public agency can work together to stimulate film and animation production, attract investment, and build talent pipelines.

- **Rebate structure**⁶⁹: Productions can receive a 35 percent rebate on Qualifying South African Production Expenditure (QSAPE). An additional 5 percent is granted if at least 30 percent of Heads of Departments (HODs) are black South African citizens and at least 30 percent of QSAPE is procured from 51 percent black-owned South African companies.
- **Dedicated development agency**: The National Film & Video Foundation (NFVF) provides funding for script development, production, marketing, and international promotion, as well as training bursaries and internships for emerging talent.
- **Strong focus on skills and inclusion**: Graduate internships and bursaries in disciplines like animation, editing, and sound ensure a steady pipeline of qualified professionals entering the sector.
- **Demonstrated impact**: The scheme has helped expand local production capacity, modernize post-production services, and position South Africa as a leading destination for both local and international productions, including streaming platforms and co-productions.

⁶⁹Department of Trade, Industry and Competition. Republic of South Africa. (n.d.). South African film and television production incentive

| Digital monetization

Unlocking digital monetization channels is essential to support creative entrepreneurship, especially among youth. In the short term, the Government of Sierra Leone, through regional and multilateral blocks (such as ECOWAS, the African Union, a bilateral engagement with Nigeria, or the Commonwealth of Nations) should negotiate collectively with digital platforms (e.g., YouTube, Spotify) and advocate for fairer inclusion of smaller markets. This is urgent because Sierra Leone currently lacks the local banking and payment integrations (e.g., PayPal) required by most global platforms, which could explain its exclusion from monetization programs. In parallel, creatives should be supported to work around current eligibility gaps by accessing international accounts, channel partnerships, and multi-channel networks abroad. This is particularly relevant for Sierra Leonean musicians using platforms like YouTube, or independent publishers looking to distribute e-books on Amazon.

Facilitating partnerships with telecom and fintech companies will enable scalable, inclusive digital payments in the medium term. Payment-system upgrades will benefit all MSMEs in Sierra Leone, but creatives have additional needs such as micro-royalty payouts and cross-border earnings for streaming. As the sector matures, the government and private sector should work together to improve mobile payment infrastructure, making it easier for creatives (such as fashion designers selling online or filmmakers distributing via streaming platforms) to receive digital earnings. Partnering with providers like Orange Money, Afrimoney, or regional fintech networks can streamline cross-border payments and improve access to revenue.

Developing a robust digital monetization and rights management ecosystem will secure Sierra Leone's place in the global creative market over the long term. This includes establishing systems for verified creators, supporting digital rights management, and building capacity for ongoing innovation. Sierra Leone should also consider joining or co-developing a pan-African digital rights framework under the African Union or the AfCFTA to promote fair royalty reporting and enforceable protections for online creative content. Reforming the 2011 Copyright Act to explicitly address digital distribution will also be critical for sectors like publishing and music, where unauthorized online use remains a major barrier to earnings.



Nigeria's digital monetization success

Nigeria offers several practical examples of how strategic partnerships and tech platforms can unlock monetization for creative sectors:

- **YouTube Partner Program eligibility:** Creators in Nigeria can now monetize on YouTube through the YouTube Partner Program by reaching thresholds such as 1,000 subscribers and 4,000 watch hours⁷⁰.
- **Meta's monetization rollout:** In 2024, Meta landed 45,000 km of subsea cables in Lagos and Uyo, increasing connectivity and economic benefits, such as running ads in-stream, Instagram Gifts, etc⁷¹.
- **Spotify royalties to Nigerian artists:** In 2024, Nigerian musicians earned over ₦58 billion (USD 38 million) via Spotify⁷², more than double the 2023 figure, reflecting the power of platform inclusion and regional music export strength.

⁷⁰ Daily Media. (2025). How to Monetize Your YouTube Channel in Nigeria: A Comprehensive Guide.

⁷¹ Ifeoma, O. (2024). Content creators in Nigeria and Kenya to monetise Meta platforms in June 2024. Techpoint Africa.

⁷² Global Financial Digest. (2025). Nigerian and South African artists earned \$59 mln in royalties from Spotify amid global boom in African music.

| IP infrastructure

Finalizing copyright regulations is the essential first step to operationalize Sierra Leone's IP framework.

In the short term, the government should complete copyright regulations to enable enforcement and institutional clarity. This should be accompanied by foundational legal amendments to better reflect the realities of creative workers, including integration of key elements of the *droit d'auteur* (author's rights) model into the existing copyright system. This will ensure stronger protections for creators—not just producers or investors—and align Sierra Leone's framework with emerging global good practice.

Strengthening the Collective Management Organization (CMO) is critical to building trust and monetization pathways.

In the medium term, the government should formally establish and resource the CMO with transparent governance, IT infrastructure, and a pilot licensing system targeting high-usage segments such as broadcasting, live events, and public venues. The CMO's capacity to register works, monitor use, and distribute royalties efficiently will determine its legitimacy among creators and users alike.

Digitizing the IP system and investing in public education will support long-term growth and global competitiveness.

A national online copyright registry should be launched to streamline rights registration, improve transparency, and support enforcement. This should be paired with IP legal aid services—including IP clinics in creative hubs and a trained network of entertainment lawyers. Once the system is fully operational, a national IP awareness campaign should be rolled out to educate creators and users, reinforcing behavioral change and encouraging widespread adoption of the formal system.

| Creative infrastructure

Mapping creative infrastructure needs and engaging private investors are immediate priorities to address production and distribution gaps.

In the short term, the government should map digital and educational infrastructure needs and assess private investor requirements, particularly for high-potential sectors such as music recording, textile production, and film editing.

Establishing public-private partnerships (PPPs) will drive the development of priority creative infrastructure in the medium and long term.

PPPs can mobilize investment for the construction and management of creative hubs, performance venues, and digital production facilities. Underutilized public buildings—such as Old Fourah Bay College—could be repurposed into creative hubs with shared access to production

equipment, co-working spaces, and internet connectivity. Priority pilot locations include Freetown, Bo, and Makeni. The Creative Villages initiative in Freetown can be expanded and linked with regional training institutes, city councils, and private sector partners (e.g., Aurora, FDTA) to support multi-sector clusters across the five priority creative industries.



| Access to finance

Co-developing short-term, project-based financial tools through sandbox testing is the immediate priority to address the financing realities of creative entrepreneurs. Most creatives in Sierra Leone are underserved by traditional banking products, which are often mismatched to their irregular income cycles and project-based work. Differentiated products, such as contract pre-financing, affordable microloans, and equipment leasing, can better reflect the cash flow

patterns of creative projects. The regulatory sandbox, already in use by the Central Bank, should be expanded and tailored to test these creative-specific financial products. Crucially, alternative collateral models—such as accepting proof of work (portfolios, contracts, or client feedback) in lieu of traditional assets—must be piloted. Partnerships with fintech and equipment suppliers can facilitate buy-now-pay-later schemes and asset-based lending, addressing the acute need for tools and technology that are often more valuable to creatives than cash. While these barriers mirror those faced by informal firms in other industries, creative enterprises are further constrained by the intangible nature of their assets, making traditional collateral requirements even more restrictive. This approach will not only improve access to finance but also generate valuable data to inform future regulatory and product design.

Establishing a Creative Economy Fund and piloting incubator-accelerator programs tailored to creative MSMEs are essential medium-term actions to foster business growth and formalization.

Creatives lack access to grants, fellowships, and risk capital, which are important for scaling up and formalizing their businesses. A dedicated Creative Economy Fund, co-designed with input from the private sector and industry associations, can provide catalytic funding for promising projects and enterprises. Simultaneously, incubator-accelerator programs should be piloted with a strong focus on business development, financial literacy, and market access. These programs must be sector-specific, recognizing the distinct needs of music, film, fashion, and visual arts, and should leverage partnerships with local banks, fintechs, and international donors. Financial institutions have indicated willingness to support such initiatives, provided they are equipped with the right technology infrastructure and sector insights. The National Payment Switch, a transformative digital infrastructure, will be a critical enabler—allowing creatives to receive payments, track transactions, and build credit histories, which in turn will facilitate access to more sophisticated financial products.

Scaling export-oriented incubation platforms will position Sierra Leone's creative economy for long-term competitiveness in regional and global markets.

There is an untapped potential for internationalization, especially by leveraging the strong “Made in Sierra Leone” brand and diaspora connections. Export-oriented incubation platforms should provide not only funding but also mentorship, market intelligence, and support for logistics and compliance with international standards. These platforms should be closely linked to the Creative Economy Fund and supported by both public and private sector partners, ensuring that the most promising creative businesses can scale, compete, and thrive on the global stage.



HEVA Fund: Kenya's creative-finance pioneer

Established in 2013, HEVA Fund is the first dedicated finance and investment facility for the creative economy in East Africa. Over the past decade, HEVA has mobilized approximately **USD 42 million**, investing in more than 120 creative enterprises and providing training and support to over **14,000 professionals** in the region⁷³. In 2024, it launched the “Thrive by Ota” program⁷⁴, which offers four tailored loan products for creative enterprises. These include **asset financing** for purchasing equipment; term loans for business expansion; **revenue-based financing**, where repayments are tied to future profits, ideal for creatives with variable income cycles; and **short-term financing**, which advances capital based on confirmed purchase orders, enabling fulfillment of large contracts or retail orders. It also works with fintech partners like Lipa Later and Wowzi⁷⁵ to pilot buy-now-pay-later schemes and embedded mobile-money repayment options, innovations that could be tested in Sierra Leone under the Central Bank's regulatory sandbox. HEVA demonstrates how a purpose-built creative fund can de-risk investment, attract private capital, and build a tailored financial ecosystem that understands the realities of creative production.

| Business formalization

Business formalization must follow a dual-track approach, promoting both enterprise registration and a legal status for individual artists. While awareness campaigns and simplified registration can bring creative enterprises into the formal economy, a significant share of creators and technicians operate as self-employed or intermittently employed individuals who require a dedicated legal and social protection framework. Implementing a national “status of the artist” in line with UNESCO recommendations would recognize their specific working conditions and unlock access to tailored benefits such as social security, taxation schemes, and collective bargaining rights.

National campaigns to promote formalization will unlock growth opportunities and improve sector visibility. In the short term, running awareness campaigns will encourage creative businesses to formalize, enabling access to finance, legal protections, and new markets. Such campaigns must be complemented by efforts to recognize the unique status of individual creators, as previously mentioned. Capacity-building support for professional associations—like FDTA and Salone Film Union—should also be institutionalized to foster peer-led formalization and sector self-regulation.

Simplified licensing and digital registration will encourage formalization and foster a more competitive business environment in the medium term. A simplified creative MSME registration scheme should be launched in collaboration with the Ministry of Trade and Industry, the National Revenue Authority, and city



⁷³ Capital FM. (2025). HEVA Fund announces Sh646mn kitty for creative industry.

⁷⁴ HEVA Fund. Thrive By Ota.

⁷⁵ Opondo, A. (2025). HEVA Fund Launches \$5 Million Initiative To Bridge Financial Gap in Kenya's Creative Sector.

councils. The scheme should bundle business registration with tax ID issuance, IP support, and mobile banking access, while offering user-friendly digital platforms and low-cost, one-stop registration processes tailored to the realities of creative entrepreneurs. In Sierra Leone, where most creative entrepreneurs and MSMEs operate informally and contribute little to the formal tax base, priority should be placed on improving accessibility, convenience, and trust in the system.

Introducing national certification frameworks will build market credibility and support international expansion over the long term. Certification can signal quality and professionalism to buyers and partners, both domestically and abroad, particularly for fashion designers seeking export, music producers applying for grants, our audiovisual studios working with international clients.

| Cross-sector collaboration

Piloting bundled offerings and creative-tourism linkages will amplify the creative economy's impact in the short term. Early initiatives should focus on linking music, fashion, tourism, and hotel sourcing to create new value chains and enhance Sierra Leone's destination branding. Drawing inspiration from Kingston Creative's Art District in Jamaica⁷⁶—which has repositioned a city once perceived as violent by turning downtown streets into mural trails, artisan markets, and performance spaces that attract cruise visitors and investors—the Ministry of Tourism can facilitate B2B matchmaking between hotels and creative collectives for décor, uniforms, furniture, or music shows.

Developing creative-tourism partnerships and integrating music and film into destination branding will drive medium- and long-term growth and international recognition. Strategic partnerships can leverage Sierra Leone's rich cultural assets to attract visitors and generate additional revenue streams for creatives. In the music industry, this could take the form of annual music festivals that are co-branded with tourism campaigns—such as a “Sounds of Sierra Leone” festival hosted in Freetown or along the peninsula beaches, drawing both regional and international audiences. These events could be organized in collaboration with the Ministry of Tourism, local hospitality businesses, and international event promoters, turning live performances into anchor attractions for cultural tourism. Additionally, partnerships between the music industry and the film industry can result in the co-production of documentaries or music videos that showcase Sierra Leone's landscapes, heritage sites, and urban culture.

⁷⁶ Kingston Creative: A Legacy of Transformation & Impact.



6.3 Conclusions

Sierra Leone's creative economy presents a **strategic opportunity for inclusive economic transformation—if supported by deliberate, sustained, and coordinated action.** The sector has demonstrated remarkable grassroots dynamism across music, fashion, crafts, film, and digital arts, yet its growth is currently constrained by fragmented policy frameworks, weak infrastructure, limited financing, and insufficient formal support. This diagnostic identifies seven core pillars—policy structure, digital monetization, IP management, creative infrastructure, access to finance, business formalization, and cross-sector collaboration—that provide a coherent roadmap to unlock the sector's potential and catalyze meaningful change.





Implementing short-term reforms while investing in long-term capacity will be critical to repositioning the creative economy as a national priority.

In the near term, foundational actions—such as finalizing the national Creative Industries Policy, establishing a Creative Economy Council, and operationalizing IP regulations—will signal policy seriousness and unlock early momentum. Business formalization, digital platform access, and pilot financing schemes can help creatives begin to scale and generate value, while creative hubs can provide visible entry points for support and experimentation. For instance, public-private creative infrastructure (such as recording studios, or post-production facilities) can serve immediate production needs and anchor new value chains. At the regional level, engaging platforms and partners through ECOWAS and the African Union can help secure monetization eligibility for Sierra Leonean creators in music, publishing, and audiovisual content.

Institutionalizing support mechanisms in the medium to long term will lay the foundation for sustainable growth and export competitiveness.

Sierra Leone must embed the creative economy into national development plans, sectoral industrial strategies, and fiscal frameworks. Formal clustering of creative production—particularly in Freetown, Bo, Makeni, and Kenema—can foster innovation, deepen supply chains, and enhance productivity. Strategic investment in broadband, digital payments, and rights management systems will position Sierra Leone as a competitive hub for mobile-first content creation and

cultural tourism. The success of international models such as Kenya's HEVA Fund, Jamaica's Kingston Creative, and Benin's Vodun Days Festival illustrates how targeted public-private interventions can transform perception, attract investment, and deliver real economic returns.

A whole-of-ecosystem approach must center the private sector, youth, and creative practitioners as co-drivers of transformation.

Creative enterprises must not be seen as peripheral actors, but as core drivers of employment, identity, and export diversification. The inclusion of women, marginalized groups, and rural creatives will be essential for equitable growth. The private sector must be engaged not only as financiers, but as co-designers, off-takers, and ecosystem builders—from telecoms and hotels to fintech and media platforms.

Momentum is building, and timely action will determine the sector's trajectory.

With high-level commitment, strategic investment, and coordinated delivery, Sierra Leone's creative economy can evolve from potential to performance. If embraced as a national priority, the sector offers a rare convergence of economic, social, and cultural returns—anchoring national pride while opening new pathways for global competitiveness and resilience.

Annex I: Framework for Defining Creative Economies

Defining and mapping a nation's creative economy presents a unique challenge, as there is no internationally standardized method for doing so. This is largely due to the inherent diversity of creative industries, which vary based on a country's cultural heritage, creative strengths, and economic structure. Additionally, the rapid evolution of the creative economy, driven by technological advancements, further complicates standardization. The availability of reliable data also differs across regions, making consistent sector definitions difficult to establish. Furthermore, terminology and classifications have evolved to reflect a combination, from earlier references to 'cultural industries' to the more comprehensive concept of 'cultural and creative industries', which captures both the cultural foundations and the broader creative and economic dimensions of the sector.

Despite these challenges, several internationally recognized methodologies provide valuable frameworks for analyzing and prioritizing creative industries, serving as guiding points for policymakers,

researchers, and industry stakeholders. These methodologies are further developed below for a broad understanding of their features and selection based on the needs of the current study.

Prominent frameworks include those from UNCTAD, which defines these industries as cycles of creation, production, and distribution using creativity and intellectual capital as primary inputs; WIPO, which categorizes them based on copyright dependency (core, partial, and interdependent); and UNESCO/Eurostat, which emphasizes cultural heritage. The Inter-American Development Bank considers both cultural domains and intellectual property protection. Country-specific approaches also vary significantly: the UK's Department for Digital, Culture, Media & Sport employs a "creative intensity" metric (the ratio of creative occupations to total employment), while South Korea's Ministry of Culture, Sports and Tourism focuses on the "content industry," prioritizing digital and knowledge-intensive sectors.

Table 1. Definitions of CIs by selected institutions

Institution	Description
UNCTAD	Creative goods and services refer to cycles of creation, production and distribution of goods and services that use creativity and intellectual capital as primary inputs; constitute a set of knowledge-based activities, focused on but not limited to culture and heritage, potentially generating revenues from trade and intellectual property rights; and comprise tangible products and intangible intellectual or artistic services with creative content, economic value and market objective (UNCTAD 2022).
UNESCO	Cultural Domains is a common set of economic and social activities that traditionally have been regarded as being “cultural”. In addition, related domains that may be considered “partially cultural” or that are more often regarded as being “recreational or leisure” rather than “purely cultural” are included (UNESCO 2009).
Eurostat	Eurostat’s cultural statistics has two dimensions: cultural domains and cultural functions. Cultural domains refer to “set of practices, activities or cultural products centered on a group of expressions recognized as artistic ones” while cultural functions capture the stages of the creative process, from creation to dissemination of cultural products and services (European Commission 2012).

WIPO

Copyright industries are defined by the extent to which their activities are dependent on copyright: core copyright industries (where creation, production, performance, exhibition, communication or distribution, and sales involve copyright-protected materials); also include inter-dependent copyright industries; and partial copyright industries (WIPO 2015).

IDB

The Orange economy refer to activities through which ideas are transformed into cultural and creative goods and services whose value is or could be protected by intellectual property rights (IPRs). These include (i) creative industries; and ii) creativity supporting activities. Creative industries combine the conventional cultural industries, design, news agencies, new media and software. (Marquez & Restrepo 2013).

UK DCMS

Creative industries are defined by creative intensity, measured by the proportion of people doing creative jobs within each industry (i.e. above a 30percent threshold) then the industry is a candidate for creatives inclusion (UK DCMS 2013). Creative jobs based on NESTA 2013 are associated with cognitive tasks such as devising new processes, constructing creative interpretations of raw materials. Includes creative specialists whose task is associated with creativity but may not necessarily be employed in a creative sector.

Korea MCST

The content industry refers to the mass information or knowledge that is published and released in the form of mass media such as newspapers, radio, and television. It includes music, film and video, animation industry, broadcasting industry, game industry, performance industry, crafts and design industry, advertising industry, information service industry, intellectual property rights management industry, etc. Content industry is defined in the Content Industry Act, previously Online Digital Content Industry Act (MCST).

Mapping and defining the creative industries in Sierra Leone require a balanced approach that captures the cultural, economic, and business dimensions of the sector. Different international frameworks define creative industries based on specific priorities: some emphasize cultural heritage and artistic value, while others focus on intellectual property, commercial viability, and innovation-driven sectors. Each definition prioritizes certain aspects over others, affecting how the sector is quantified and analyzed.

Based on the overall assessment and the data available, mapping the creative industries in Sierra Leone has been based on the UNESCO Framework for Cultural Statistics to categorize creative industries based on their cultural and economic roles. This will be the primary framework for defining and identifying the size of creative industries in Sierra Leone. Using UNESCO's categorization also ensures structured data collection, making it possible to compare Sierra Leone's creative economy with global trends

and establish a consistent baseline for sectoral development.

While it provides a structured approach, it may underestimate certain industries classified as creative under other definitions. The framework has therefore been adapted to cover broader activities which align with the situation on-the-ground in Sierra Leone. Key areas of differentiation have been established:

- Local insight from creative stakeholders has highlighted the need to take into consideration industries that have not yet been adopted by the UNESCO framework, such as pageantry and culinary arts.
- Stakeholder insights also led to an updated categorization of the creative industries. UNESCO's framework breaks industries into i) cultural and natural heritage sectors, ii) cultural and creative industries, iii) transversal sectors for supporting

services. Based on stakeholder feedback, the categories have been updated to align with local structures, they are:

- Visual arts
- Performing arts
- Digital arts
- Cultural Heritage
- Consideration of core and broad creative industries in line with the World Bank approach to defining the creative economy which identified three common factors to creative industries: IP protection and monetization, leveraging intangible assets and cultural heritage, and digitalization technologies that facilitate creation and distribution. Industries with strong presence of these factors demonstrate higher "creative intensity" and can be categorized as creative.

These factors help distinguish between core and broad creative industries. Core creatives inherently embed all three factors, producing fundamentally creative goods and services. Broad creatives, meanwhile, incorporate at least one creative factor to enhance their value, though their final products may not be traditionally creative. This broader category offers significant economic opportunities for developing countries to upgrade their products and service, especially when the capabilities in core creative industries are underdeveloped.

Based on these three structural updates, the creative economy for Sierra Leone has been defined as comprising the following structure and industries, which are explored in further detail throughout this Diagnostics Report.

Figure 10. Sierra Leone's creative economy



Annex II: Case Studies

Case Study 1: Ballanta Academy of Music and Performing Arts

Website: www.ballantaacademy.org

Sector focus: Music, dance, performing arts

Location: Freetown, Sierra Leone

Overview

Established in 1995 by a group of passionate music enthusiasts, the Ballanta Academy is Sierra Leone's first formal music school. It is named after Nicholas George Julius Ballanta, a prominent Sierra Leonean musicologist and composer. Over nearly three decades, Ballanta has served as a rare anchor institution for creative education in the country, offering foundational training in music and more recently, expanding into dance and exploring theatre and filmmaking.

The Academy functions on a small-scale, community-driven model, prioritizing accessibility, inclusion, and passion for the arts over commercial success. Despite significant structural constraints, Ballanta continues to be a key cultural space in Freetown.

Core activities and offerings

- Music and dance training, with plans to expand into theatre and filmmaking.
- Live performances, recitals, and community events, hosted in an on-site auditorium (seating capacity: 80).
- Participation in public events, sometimes featured on national TV (though media coverage must be paid for by the academy).

Business model and financing

Ballanta's operations are sustained through a patchwork of symbolic membership fees, donations, event fees, occasional small grants, and a modest government subvention.

- Event fees average around 100 Leones, while membership fees are intentionally minimal (2000 Leones/month or 5000 Leones/year) to ensure access.
- Ballanta receives support from Sharewill, a philanthropic partner.
- The Academy currently supports around 40 students, many of whom are on partial or full scholarships.

Tutors (currently 4) are compensated with very low salaries, and their work is driven more by passion and dedication than financial reward.

Key challenges

- **Funding:** Tutors receive very low salaries, teaching out of passion rather than for income. Limited resources for expanding programs or improving infrastructure.
- **Student retention:** Many students discontinue studies after a year due to financial difficulties and uncertainty about career opportunities in the arts.
- **Training:** There is a need for more comprehensive training, including music literacy, as many students learn by ear without reading musical notation. Lack of certification currently hinders formal recognition of skills—though the school is working towards a national certificate.

Policy and sectoral gaps: The Ministry of Education previously ran national music festivals, but this no longer happens due to lack of departmental leadership. There is a clear gap in national support structures for creative education, which undermines long-term growth.

Opportunities for growth

- **Enhanced partnerships:** Collaborations with higher education institutions and international organizations could provide scholarships, exchange programs, and access to experienced tutors.
- **Curriculum development:** Integrating arts education into the national curriculum and establishing regional arts hubs could promote sustained interest and development in the creative economy.
- **Community engagement:** Raising awareness about the value of arts education and showcasing success stories can help change perceptions and encourage more students to pursue careers in the creative industries.

Notable Alumni

- **Drizilik:** Acclaimed musician known for blending traditional Sierra Leonean sounds with contemporary music.
- **Hawa Hunt:** Recognized performer and advocate for the arts within the community.

Lessons learned / strategic insights

- Ballanta exemplifies the power of community-based models in creative education, even in low-resource environments.
- The Academy's persistence despite minimal public funding highlights both the resilience of local creative initiatives and the urgent need for structural policy and financial support.
- Building formalized training pathways and certification mechanisms will be essential for improving career outcomes and institutional recognition.
- A public-sector revival of arts promotion (e.g., festivals, competitions, media showcases) could multiply Ballanta's impact across the country.

Case Study 2: Cribs International

Website: www.cribsinternational.com

Sector focus: Music, event production, printing, talent management

Location: Sierra Leone, Nigeria, Liberia

Overview

Cribs International, founded and led by creative entrepreneur Sho Cole, is a pioneering, multi-country creative enterprise operating across Sierra Leone, Nigeria, and Liberia. The company is officially registered in all three countries, with its strategic base in Nigeria — chosen for its more business-friendly environment.

Cribs International, founded five years ago, is a multifaceted creative enterprise operating across **Sierra Leone, Nigeria, and Liberia**, with a strategic organizational base in Nigeria due to its more conducive business environment. As part of the **ECOWAS** framework, Cribs benefits from regional economic integration, facilitating operations and talent movement across member countries.

Core activities and offerings

Cribs functions as a production company; record label and talent management agency; printing company; and events management firm.

It is also involved in high-level event production, including both entertainment shows and formal engagements such as presidential addresses.

Business model and financing

Cribs' revenue model is largely driven by its events business, where it earns approximately \$10,000–\$15,000 per show through sponsorships. Unlike more developed markets, Sierra Leone's broadcasting ecosystem does not pay for content; rather, Cribs must provide content for free to local TV networks.

The company also benefits from:

- Global distribution networks for music and video content.
- A UK-based YouTube channel that provides access to monetization.
- Internal investments made by the founder, who continues to fund growth despite limited local digital infrastructure.

Team and capacity building

Cribs employs **52 staff members in Sierra Leone**, drawing on both local and international expertise. While certain specialized skills are sourced from **Ghana and Nigeria**, there is a strong commitment to in-house knowledge transfer. Sho emphasized that Cribs actively trains local talent under the guidance of these external specialists, aiming to build sustainable domestic capacity in creative production and event management.

Talent search and innovation

Cribs is leading the charge in innovation through initiatives like its **Talent Search**, the first of its kind in Sierra Leone. This project, fully managed by Cribs, seeks to discover and promote emerging creative talent in the country.

A prior initiative, **Vybe & Spin**, focused specifically on DJs and served as a precursor to the broader Talent Search format. Both initiatives exemplify Cribs' commitment to platforming local creatives and building a professional creative industry.

Key challenges

- Lack of profitability in the local creative economy due to unpaid broadcast models.
- Underdeveloped IP frameworks: There are no dedicated intellectual property organizations or entertainment lawyers in Sierra Leone, limiting not only artists' ability to secure publishing rights or royalties, but also preventing creative businesses (such as record labels) from benefiting from IP monetization as producers.
- Digital infrastructure deficits, which hamper monetization of content online.
- Limited access to quality production equipment locally — all 4K cameras and related gear are sourced from China or the US.
- The absence of structured legal, financing, and policy support for creative enterprises limits long-term viability.

Opportunities for growth

- Formalization of IP rights and entertainment law in Sierra Leone would improve artists and producers' protections and monetization pathways.
- Public-private partnerships could help fund high-cost productions and talent incubation.
- Better internet infrastructure and digital services would unlock new revenue models, including subscription content, YouTube monetization, and streaming.
- Sho continues to invest in Sierra Leone's creative economy not only because of personal belief in its potential, but also with the hope that his company can help lay the groundwork for a more structured and commercially viable industry.

Lessons learned / strategic insights

- A profitable creative economy requires ecosystem-level reforms—including legal protections, monetization channels, and infrastructure.
- Regional integration is a strength, and leveraging the ECOWAS framework allows creative businesses to scale across borders even when national systems are underdeveloped.
- Passion alone cannot sustain the industry; private-sector investment depends on demonstrated profitability and clear policy support.
- Sustainable talent development needs to be built into every stage of the creative enterprise—from training and mentorship to production and rights management.

Case Study 3: Aurora Foundation

Website: www.aurorafoundation.is

Sector focus: Handicrafts, textiles

Location: Sierra Leone (field operations),
Iceland (origin)

Overview

Aurora Foundation is a private, Icelandic non-profit organization with a dual mission: to support sustainable development and empower creatives through hands-on collaboration and market access. The foundation has been operating in Sierra Leone for several years through two main pillars—Aurora Impact and Sweet Salone—that combine skills development with international product and brand partnerships.

Its work is based on deep, trust-based relationships with local artisans, linking them to global design networks, and providing immediate payment and bulk purchase orders to empower producers economically.

Core activities and offerings

Aurora's work in Sierra Leone is built around two interconnected pillars:

1. **Aurora Impact:** Offers training and support services for young professionals and aspiring entrepreneurs. The offer short digital courses, skill-building, and mentorship to promote economic empowerment and innovation.
2. **Sweet Salone:** A lifestyle brand that is 100 percent made in Sierra Leone, Sweet Salone links local artisans with international designers, who collaborate on product design and source handcrafted items from Sierra Leonean makers. These designers buy directly from artisans, helping bridge local craftsmanship with global markets.

The Aurora Foundation works with around 50 artisans, with a focus on:

- Textiles (e.g., gara dyeing and country cloth weaving)
- Beads and jewelry
- Pottery (via the Lettie Stuart Pottery School in Waterloo)
- Children's fashion and accessories
- Basket weaving (artisans spread across the country)

A key operational principle is that artisans are paid upon delivery, rather than after items are sold. This gives immediate liquidity to producers and enhances trust. “For instance, a roadside basket weaver might sell one or two baskets a day, but we’re buying 50 at once. That bulk purchase allows artisans to make significant life investments—like improving their homes or paying school fees.”

Team and capacity

- Works with around 50 artisans across the country.
- Artisan selection began with a grassroots journey: Aurora’s Executive Director traveled across Sierra Leone between 2016–2017 following community leads and word-of-mouth to discover untapped talent.
- Many artisans are illiterate and face challenges with financial literacy and business management, which Aurora addresses through tailored support and long-term engagement.

Customer base & market reach

Initially, expatriates were the main buyers of Sweet Salone products, but the market is evolving.

- Increasingly, Sierra Leoneans are purchasing items for home décor, gifts, or special occasions.
- Restaurants and hospitality venues are showing interest—offering new channels for artisan products.
- On the international front, Aurora participates in trade fairs (e.g., a show in France in September), continually tweaking its European marketing strategy to improve brand traction.

Key challenges

- **Shipping/export logistics:** You can only export in full containers; shipping anything less is prohibitively expensive. This is a major barrier for small-scale exporters. In contrast, shipping into Sierra Leone is more flexible, with multiple companies offering inbound logistics.
- **Product consistency and quality control:** Quality standards are a recurring challenge, particularly with new designs. Developing a new product often requires:
 - Prototyping (which is expensive and time-consuming)
 - Repeated iterations and hands-on collaboration
 - Long-term relationship-building with artisans

“That shared memory of ‘remember when we made it shorter like this?’—that’s where trust and consistency come from.”

Strengths of the creative industries

- Textile arts are a significant cultural and economic strength—particularly gara dyeing and country cloth weaving, both widely recognized across the country.
- Basket weaving is another craft with rich tradition, though artisans are often dispersed and lack collective structures.
- There’s a growing energy and momentum around the creative economy—potentially driven by social media exposure, increased inspiration, and wider public awareness.

Future plans

- Expanding collaborations with the hospitality industry in Sierra Leone to boost local sales and visibility.
- Launching a new marketing campaign targeted specifically at commercial clients—such as restaurants and hotels.
- Continuing to refine their European market approach, including participation in international trade shows and testing new outreach strategies to build the Sweet Salone brand abroad.

Lessons learned / strategic insights

- Strong relationships are key to ensuring product quality, building trust, and maintaining consistency.
- Working with the same artisans over time allows for gradual improvement and shared learning.
- Patience and sustained engagement yield better results than quick transactions or one-off projects.

Case Study 4: Frederica Williams (JF Eritej and FDTA)

Website: N/a

Sector focus: Fashion and textiles

Location: Sierra Leone

Overview

Frederica Williams is a fashion entrepreneur and president of the Fashion, Design and Textiles Association (FDTA). With a background in running her own label, JF Eritej, Frederica has taken a lead role in sector formalization, organizing entrepreneurs and advocating for investment and visibility in the fashion and design space.

The FDTA was registered with the municipality in 2021 and officially launched in 2024 with support from the British High Commissioner and Invest Salone. Formally incorporated as a limited-by-guarantee company in 2024.

Core activities and offerings

a. JF Eritej fashion brand

- Employs approximately 35 people across two production centers.
- Receives support from initiatives like SLEDP and Creative Hub Africa to scale operations.
- Plans to invest in equipment upgrades—covering everything from stitching to packaging.

b. Fashion, Design and Textiles Association (FDTA)

- Organizes capacity-building programs: trainings, masterclasses, and symposiums.
- Facilitates regional collaborations across West Africa (e.g., Nigeria, Ghana, Kenya, South Africa).
- Advocates for business formalization, requiring members to register and hire at least 2 staff (requirements for Association membership).
- Promotes fashion as a viable industry for employment and economic growth.
- Organizing Freetown's first-ever Fashion Week in April 2025, creating visibility for local designers.

The Association currently has 22 members, of which only 8–10 are active, all of them based in Freetown.

Business model and financing

FDTA operates on a membership-based model, though engagement and fee payment remain limited. JF Eritej, by contrast, follows a growth-oriented private sector model with external support:

- Funding from SLEDP and development partners
- Ambitions to increase production capacity and access regional markets
- Facing high overhead costs, including imported accessories and machinery

The broader fashion ecosystem in Sierra Leone struggles with access to finance, costly logistics, and fragmentation, making scale difficult for most designers.

Key challenges

- Low member engagement due to lack of perceived short-term benefits and limited capacity for consistent participation in meetings or initiatives.
- Many fashion businesses in Sierra Leone are informal and unregistered, limiting their recognition and access to government or donor support.
- Fragmentation in the sector and over-reliance on a small number of active individuals.
- Major skills deficits in both technical and digital areas. Many workers are self-taught, with limited access to formal education in fashion and textiles. The only known institution (at Wilkinson) is expensive and inaccessible for many. This has led to increasing reliance on foreign workers from countries like Senegal, Ghana, and Nigeria to fill technical roles—despite the presence of unemployed locals who could be trained.
- Many fashion houses are micro-scale operations, often run by 1–2 individuals. This limits ability to scale or take on large orders.
- Access to specialized equipment is a key constraint. The Association's vision includes establishing a shared production center, where members could access high-cost machines at minimal fees.

Supply chain

- Markets vary by designer: some sell locally in Freetown. Others export to diaspora clients in the UK and US, especially during summer.
- Export remains costly, mainly due to:
 - High courier fees (due to low shipment volumes).
 - Limited local availability of accessories like zippers, buttons, etc., which must be imported from Ghana or Nigeria.
 - Logistical costs vary by mode—large orders via road; smaller orders by air.
- Most fabrics and accessories are sourced within Africa. Very few members import from overseas. Importing machinery or accessories from outside Africa (e.g., China) is impractical for small businesses due to cost and delays.

Opportunities for growth

- Establishing a shared production center for FDTA members to access equipment collectively.
- Deepening cross-sector collaborations (e.g., with music, crafts, visual arts) and increasing participation in festivals and creative events.
- Strengthening the diaspora market, particularly in the UK and US.
- Leveraging government interest (e.g., Ministry of Trade's planned September creative event) to drive policy support.
- Creating a fashion and design incubator, potentially in partnership with donor organizations.

Lessons learned / strategic insights

- Sector organizing is difficult but essential; strong leadership and anchor brands (like JF Eritej) help catalyze collective action.
- There is a gap between informal creative talent and formal market readiness—capacity-building must bridge this divide.
- Export potential is real, especially through diaspora engagement, but structural enablers (finance, logistics, legal protections) must be addressed.
- Shared infrastructure models can reduce cost barriers and promote skills transfer.

Case Study 5: Creative Hub Africa (CHA)

Website: www.creativehubafrica.com

Sector focus: Fashion, culinary arts, visual arts, music, photography & videography

Location: Freetown, Sierra Leone

Overview

Creative Hub Africa (CHA) is a vibrant, grassroots-driven platform dedicated to nurturing youth and women in Sierra Leone's creative economy. Founded by fashion entrepreneur Isatu Harrison, CHA emerged from her experience operating a fashion factory in one of Freetown's underserved neighborhoods. What began as a single design brand evolved organically into a multipurpose creative community.

Officially launched three years ago, CHA supports emerging talent across multiple disciplines, offering training, mentorship, access to markets, and monthly opportunities to showcase and sell creative work.

Core activities and offerings

CHA supports creatives across different disciplines:

- Fashion and textiles
- Photography and videography
- Visual arts
- Music
- Culinary arts

Fashion and culinary arts are currently the most prominent, with chefs like the renowned Fulani chef Fatmata Binta serving as key inspirations.

Key initiatives include:

- **Training programs:** Offering workshops and skill-building sessions across multiple creative disciplines.
- **Membership model:** Creatives pay a small fee for access to hub services and space. This instills a culture of valuing creative infrastructure and understanding the cost of running a business.
- **Guest sessions:** Hosting key industry players who share insights and provide inspiration for those looking to grow their businesses or transition into creative careers.
- **Monthly pop-Up markets:** Held on the last weekend of every month. For example, during Christmas, CHA organized a cashless market, promoting digital financial tools and mobile payments.
- **Digital inclusion program:** Providing training on digital tools to increase tech literacy among creatives and enhance their ability to market and sell their work online.

Key challenges

Creative industries are often not seen as a legitimate career path. Most people engage in creative work as a side hustle, not a full-time profession.

The industry is heavily male-dominated, especially in freelance roles. For women, additional barriers include:

- Safety and security concerns—especially in unregulated freelance environments—often discourage women from participating fully in the creative economy, where work frequently takes place in informal, male-dominated, and poorly monitored settings
- Lack of formal policies or protections
- Cultural expectations and domestic responsibilities (e.g., childcare)

Despite these challenges, more women are entering the creative space—often to support themselves through university or supplement household income.

There is significant potential for growth, particularly in fashion, if the right support systems are in place: legal frameworks, access to materials, technical training, and mentorship.

Other challenges include high rental costs and lack of proper performance and exhibition spaces (existing venues are limited to small spaces such as the Ballanta Academy and Fourah Bay College. There is no dedicated, fully equipped theater or multi-use space for large-scale events.)

Clusters

Although not previously considered through a clustering lens, Isatu noted potential geographic specializations in Sierra Leone:

- **Bo** – Craft production
- **Freetown** – Crafts and fashion
- **Makeni** – Textiles, particularly tie-dye traditions – central hub to showcase/sell
- **Tongo** – Textiles

Future plans

One of CHA's long-term ambitions is to develop a **Boxpark-style creative space**, inspired by the concept in Shoreditch, London. This would be a multi-functional venue where people can:

- Eat
- Shop for locally made creative products
- Attend performances and events
- Go to the cinema
- Engage in exhibitions and markets

However, since publicly announcing the idea, Isatu has noticed increased competition, with others attempting to replicate the concept. She remains committed to her vision though.

Lessons learned / strategic insights

- Community-first models work: People are more likely to grow and commit when they feel supported and connected.
- Inclusivity must be intentional: Women need safe spaces, mentorship, and flexible programming to overcome entrenched barriers.
- Without spaces to perform, train, or exhibit, talent is stifled.
- Simple digital tools can dramatically increase a creative's market access and income potential.
- Sustained support builds resilience: The most successful creatives are those who receive ongoing guidance—not just one-off training.

Case Study outside the Creative Economy: Formalization efforts in Sierra Leone's mining sector

Source: Kimberley Process Civil Society Coalition. (2022). "[Grassroots research: Artisanal mining and community development in Sierra Leone. KPCSC](#)"

Overview

The artisanal mining sector in Sierra Leone has historically operated informally, with weak regulatory oversight and limited integration into formal financial and governance systems. Recognizing these challenges, the government, supported by civil society organizations such as the Kono Peace Diamond Alliance and the Kimberley Process Civil Society Coalition (KPCSC), has promoted formalization initiatives aimed at increasing transparency, improving livelihoods, and providing access to financial services for artisanal miners.

Core activities and offerings

Formalization initiatives in the artisanal mining sector have centered around:

- **Licensing and cooperative formation:** Encouraging miners to form cooperatives and apply for official mining licenses, granting them legal rights to operate and access support services.
- **Financial inclusion:** Partnering with financial institutions to develop tailored savings and microcredit schemes for miners, reducing reliance on predatory lending arrangements.
- **Capacity building:** Delivering training on responsible mining practices, financial management, and cooperative governance to strengthen miners' economic resilience.

Key operational principles included ensuring that cooperatives were community-driven, simplifying registration processes, and promoting local ownership of formalization efforts.

Key challenges

- Many miners feared that licensing would increase costs or government interference without delivering real benefits.
- Even with simplified procedures, some miners struggled to afford licensing fees or cooperative registration costs.
- Sustained support was needed to build administrative, financial, and operational capacities within newly formed cooperatives.
- Despite formalization, barriers to reaching premium international buyers persisted without broader systemic reforms.

Strengths of the initiative

- Established a replicable model for transitioning informal economic actors into the formal sector through simplified licensing, capacity building, and financial inclusion strategies.
- Created early examples of functioning mining cooperatives that could inspire similar efforts in other sectors.
- Illustrated the importance of civil society leadership and community trust-building in driving successful formalization.

Lessons learned / strategic insights

- Formalization initiatives are more successful when they are community-driven, with strong local ownership and clear economic benefits.
- Access to financial services is a critical enabler of successful formalization.
- Building trust through sustained engagement is essential to overcoming skepticism and resistance to formalization.
- Support systems (training, finance, cooperative governance) must accompany legal registration to ensure long-term viability.

International Case Study: South Korea's Creative Economy and the Hallyu Wave

Sources:

- Santos & Marques (2022), "[South Korea's Creative Economy: A Case Study on the Hallyu Wave](#)"
- Ogando Barros (2020), "[The Hallyu Wave and Tourism in South Korea](#)"

Overview

South Korea is widely recognized as a global pioneer in leveraging its creative economy as a strategic engine for economic development, global visibility, and cultural influence. Central to this success has been the phenomenon known as the Hallyu Wave—the global rise in popularity of Korean cultural products including K-pop, K-dramas, films, fashion, beauty, and variety shows.

From the early 2000s, South Korea's government pursued deliberate policies to transform cultural industries into economic powerhouses. These efforts resulted in substantial GDP contributions, the creation of global fanbases, and a major boost to tourism, exports, and national branding. The Hallyu Wave not only enhanced Korea's soft power, but also showcased how cultural content can generate economic spillovers across multiple sectors.

Government policy and ecosystem building

South Korea's creative economy success is rooted in active government intervention and long-term planning. Key interventions include:

- Creative Economy Action Plan (2013): Integrated innovation and culture into industrial development.
- Heavy investment in R&D and cultural infrastructure, such as production facilities, media clusters, and training institutions.
- Support for startups in creative tech, gaming, and design.
- Public-private partnerships to promote cultural exports.
- Legal and institutional frameworks to protect intellectual property and encourage digital innovation.

The government provided not only funding and facilities, but also regulatory reforms to enable digital content distribution, copyright enforcement, and foreign licensing agreements.

The Hallyu Wave as cultural export

The cultural products driving South Korea's creative economy include:

- **K-dramas and variety shows**
 - Professionally produced, highly exportable TV series and reality formats
 - Themes appeal to both regional and global audiences (romance, tech, youth culture)
 - Served as entry points for foreign audiences into broader Korean culture
- **K-pop and music exports**
 - Multilingual, visually compelling content delivered via platforms like YouTube
 - K-pop agencies developed systematic talent pipelines for training, branding, and global promotion
 - Integrated fan culture and merchandise into commercial strategies

- **Lifestyle and brand spillovers**

- The popularity of Korean culture led to rising demand for beauty products, food, fashion, and tourism, turning content into a springboard for consumer exports.

The hallyu-tourism nexus

One of the most distinctive impacts of the Hallyu Wave has been its catalytic role in boosting South Korea's tourism industry.

- International visitors surged as fans sought to experience Korea firsthand
- Hallyu-related sites became major attractions: filming locations, museums, concert venues.
- "Set-jetting" (traveling to filming sites) became a major trend
- Korea Tourism Organization integrated pop culture into its national marketing campaigns

Strategic insights for Sierra Leone

South Korea's creative economy model provides valuable lessons for countries like Sierra Leone seeking to unlock the potential of their cultural industries:

- **Government as enabler**

- Build supportive policies and creative infrastructure, including studios, coworking spaces, and IP offices.
- Offer tax incentives, grants, and loans for creatives and cultural entrepreneurs.
- Create a national strategy for creative economy development, with clear targets for exports and employment.

- **Cultural identity as export**

- Position Sierra Leone's music, fashion, crafts, and storytelling as internationally marketable cultural assets.
- Encourage branding campaigns like "Made in Sierra Leone" to build global awareness.
- Invest in high-quality media production and digital storytelling.

- **Creative tourism**

- Develop packages around festivals, fashion weeks, artisan markets, and filming locations.
- Collaborate with influencers and diaspora to promote Sierra Leone as a cultural destination.
- Use music and fashion events to drive inbound tourism.

- **Digital platforms**

- Train creatives in online marketing, streaming, and monetization.
- Explore mobile-first content creation models, given local infrastructure.
- Use platforms like YouTube, TikTok, and Spotify for low-cost global reach.

- **Ecosystem development**

- Encourage sectoral organizing through associations and creative hubs.
- Support youth entrepreneurship, especially among women.

International Case Study: South Africa's Amapiano movement

Source:

- Eaby Lomas, 2024, "[Athens Journal of Humanities & Arts](#)"

Overview

Amapiano is a South African music genre that emerged in the mid-2010s, combining deep house, jazz, kwaito, and local percussive rhythms. Originating from the townships of Gauteng province, Amapiano is more than a musical genre—it is a cultural and economic phenomenon that captures the aspirations, struggles, and creativity of South Africa's youth.

Amapiano emerged from the margins of South African urban life—through informal DJ sets, house parties, and even taxi ranks. It was not state-sponsored nor industry-funded, making its success a striking example of bottom-up cultural production.

Musically, the genre is characterized by minimalist piano melodies, deep log drum basslines, and relaxed tempos that set it apart from mainstream commercial pop. Lyrically, Amapiano songs often blend isiZulu, Sepedi, and township slang, creating a linguistic mosaic that reflects everyday life in the townships. This has reinforced a hyper-local yet globally resonant identity that resonates with youth audiences both within South Africa and across the continent.

Youth ownership and digital platforms

- Amapiano's rise is tightly linked to youth control of content creation and distribution.
- Platforms like YouTube, TikTok, and WhatsApp became primary spaces for circulating new tracks and building fan bases.
- DJs and producers self-published tracks, bypassing traditional record labels.
- Dance challenges and visual culture (e.g., TikTok choreographies) played a pivotal role in audience engagement.
- However, the movement has faced criticism for being male-dominated, with female producers and vocalists often sidelined.

Economic impact and informal markets

- Amapiano created new forms of livelihood in informal settings—DJs, dancers, videographers, event organizers, fashion influencers, and social media curators.
- Events like "lockdown groove parties" during Covid-19 kept the genre alive and monetized via donations and mobile payments.
- Amapiano music became a driver of tourism and hospitality recovery, with international festivals and performances in Nigeria, the UK, and the UAE.

Key enablers of success

- Digital fluency: Young creators mastered tools like FL Studio, TikTok, and WhatsApp for production and distribution.
- Low barriers to entry: Affordable software and mobile phones democratized music creation.
- Community circulation: Taxi ranks, street vendors, and township clubs served as real-time testing grounds.
- Cultural authenticity: Grounded in township culture, Amapiano reflects youth identity and resistance.

Strategic insights for Sierra Leone

- **Invest in youth-led innovation.** Sierra Leone's youth have the passion and ingenuity to drive their own cultural movements. However, they often lack access to tools and learning environments. Investments in affordable music production equipment, community recording studios, and training in digital production software are essential first steps. Support should extend to creative hubs, after-school programs, and peer-led workshops, building from the grassroots up.
- **Build foundations for digital monetization.** One major difference from South Africa's Amapiano story is Sierra Leone's inability to monetize content on YouTube or streaming platforms, due to constraints in digital infrastructure, ad market participation, and IP enforcement.
- **Position local sounds for exports.** Even with limited monetization infrastructure, Sierra Leone can begin to brand and promote its unique musical styles—such as gumbe, bubu, and coastal fusion genres—through diaspora showcases, festival exchanges, and bilateral culture partnerships. Government and private sector players can collaborate to create a “Made in Sierra Leone Music Export Incubator” focused on talent curation, storytelling, and export readiness.
- **Prioritize IP awareness and enforcement.** Without strong IP systems, artists in Sierra Leone cannot secure control or income from their work. Amapiano's rise was bolstered by South Africa's relatively mature IP environment. In contrast, Sierra Leone lacks functioning collective management organizations, entertainment lawyers, and accessible copyright registration systems.

Annex III: Methodologies to Assess Priority Creative Industries

As highlighted in Section 3 of this report, several approaches have been used to define the priority creative industries in Sierra Leone, focusing on three contributing areas: employment contribution, creative job intensity and economic contribution. This Annex sets out in further detail the methodologies used to assess these three components of Sierra Leone's creative economy.

Creative job intensity⁷⁷

The creative economy's growth potential varies significantly across industries, making prioritization essential. Ideally, policymakers should focus on industries with the highest creative intensity—those that intensively utilize IP protection and monetization, leveraging intangible assets and cultural heritage, and digitalization. In developing countries such as Sierra Leone where data is scarce, estimating creative intensity can be challenging. In these contexts, creative workers can serve as a useful measure of creative intensity because their skills directly embody creative capabilities. For example, animators create characters that may be distributed on streaming platforms (such as Webtoons), and their value can be monetized through intellectual property (IP). Analyzing these creative workers allows us to estimate how extensively different industries engage in creative activities, providing a practical metric for assessing creative intensity. Priority industries will naturally vary between countries, reflecting each nation's unique endowment of creative assets embedded in its creative workers. Box 1 discusses how creative intensity is calculated using creative workers.

Measuring creative intensity using creative workers

Defining creative industries is inherently challenging, and determining what qualifies as a creative occupation is equally complex. Various institutions and researchers have proposed definitions, each capturing different aspects and characteristics of creative work. A key difficulty lies in the diversity of these occupations—they encompass a broad range of tasks and require specialized skills that apply across multiple sectors. Additionally, the cultural and creative industries are constantly evolving, leading to the emergence of new occupations.

To address these challenges, this note adopts a methodology that estimates the share of creative occupations across industries, classified at the 4-digit ISIC level. This methodology defines the Creative Intensity ($CI_{i,k}$) of industry i in country k as the proportion of creative occupations relative to total occupations in that industry. For each category, we calculate creative intensity using the following equation:

$$\frac{\sum_{o \in O} E_{o,i,k}}{E_{i,k}}$$

where:

- $CI_{i,k}$ represents the creative intensity for industry i in country k
- O is the set of occupations
- $E_{o,i,k}$ is the employment in occupation o within industry i in country k
- $E_{i,k}$ is the total employment in industry i in country k

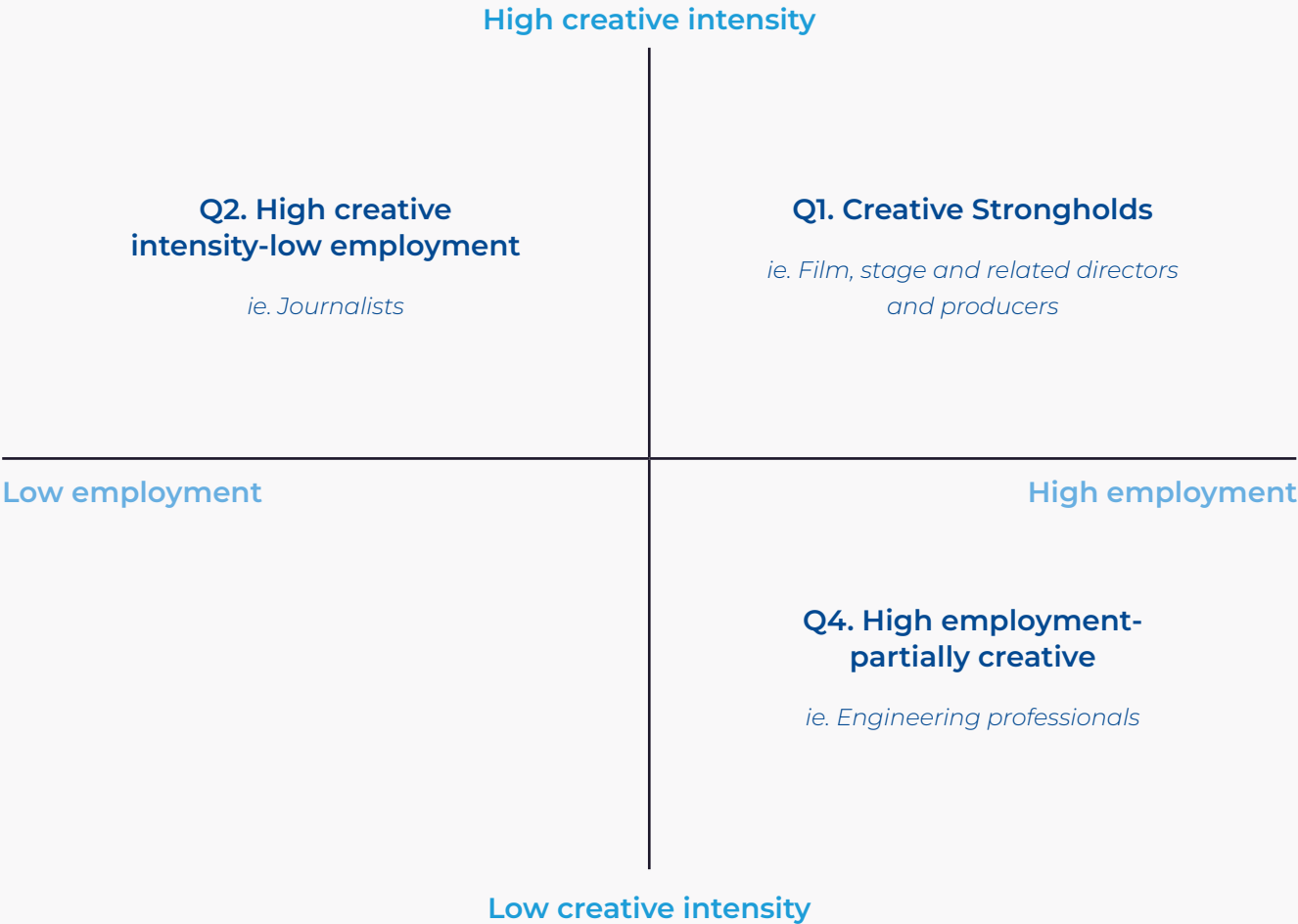
This approach identifies priority industries within both core and broad creative industries by evaluating creative job intensity and total employment figures (see figure below). These priority sectors can be classified into three groups:

- *Creative Strongholds* are industries that demonstrate both high creative job intensity and substantial employment numbers (see Q1). These industries already have extensive creative activities and significant workforce presence, making them natural priorities for continued development and support.
- *High creative intensity-low employment* sectors include high creative job intensity but low employment (see Q2). Industries in this group have significant creative assets embedded in their activities due to the high presence of creative workers.

⁷⁷ Methodology elaborated by the World Bank to evaluate creative economies

- *High employment supporting creatives* include those which have low creative job intensity but employ large numbers of workers (see Q4). This combination suggests untapped opportunities - with targeted support to increase creative

elements in their operations, these industries could leverage their extensive workforce to generate significant creative output and economic value.



Using the creative intensity approach discussed above, we calculate the creative job intensity for each core and broad creative industry to examine whether Sierra Leone has de facto creativity and employs creative workers in these sectors. Creative job intensity is defined as the share of creative occupations to total employment. Measuring creative job intensity across industries relies on two key data sources. The first is the Labor Force Survey (LFS) from 2014, which was primarily designed to generate precise estimates for underemployment⁷⁸. The industry classification in this survey is available at a detailed 4-digit ISIC Rev. 4 level, allowing for creative job intensity calculations at this granular level. The second source is the Sierra Leone Integrated Household Survey (SLIHS) from 2018, originally designed for precise poverty estimation. This survey provides industry classification at a

2-digit ISIC Rev. 4 level, limiting creative job intensity calculations to this broader level. These complementary datasets provide different levels of granularity for analyzing creative job patterns across industries.

From this analysis, this section identifies priority industries based on both creative job intensity and total employment figures. Industries demonstrating high creative job intensity and/or employing significant numbers of workers are designated as potential priority sectors for development and support.

This results in seven creative subindustries that need to be prioritized to develop Sierra Leone's creative economy.

⁷⁸ The labor underutilization rate was considered a key indicator in labor force surveys, according to the 2014 LFS documentation. This priority influenced the survey's sample design, which was specifically structured to generate precise estimates of underemployment

Table 2. Priority activities for Sierra Leone's Creative Economy

2dgt/4dgt	Industry	Creative intensity (percent)	Total employed	Examples of creative workers hired in this industry
Creative Strongholds				
5914	Motion picture, video and television programme production, sound recording and music publishing activities	100.0	1647	Film, stage and related directors and producers
9000	Creative, arts and entertainment activities	66.9	1251	Creative and performing artists; Artistic, cultural and culinary associate professionals; Handicraft workers; Printing trades workers
60	Programming and broadcasting activities	40.8	1370	Information and communications technology service managers; Authors, journalists and linguists; Creative and performing artists; Telecommunications and broadcasting technicians
20	Manufacture of chemicals and chemical products	35.2 percent	5802	Craft and related workers, n.e.c.
High creative intensity-low employment				
5813	Publishing of newspapers, journals and periodicals	100.0	358	Journalists
High employment-partially creative				
71	Architectural and engineering activities; technical testing and analysis	15.3	4562	Engineering professionals (excluding electro-technology); Physical and engineering science technicians; Architects, planners, surveyors and designers; Electro-technology engineers; Mathematicians, actuaries and statisticians
63	Information service activities	19.4	2615	Software and applications developers and analysts; Information and communications technology operations and user support technicians; Printing trades workers

Source: Consultants' Analysis

The first four industries belong to Creative Strongholds - areas where Sierra Leone has already cultivated significant capabilities within its workforce. These industries stand out by demonstrating both high creative job intensity and substantial employment numbers. They employ diverse creative talent including film directors and producers, performing artists, cultural and culinary professionals, handicraft workers, printing trades workers, ICT service managers, authors, journalists, linguists, and telecommunications and broadcasting technicians. The presence of these specialized creative workers within robust employment sectors indicates that these industries are already producing or making use of creative assets in its activities, which can be further nurtured to drive economic growth.

Meanwhile, publishing of newspapers falls into our "High creative intensity-low employment" category. While rich in creative talent as evidenced by high creative job intensity, these industries do not have high employment compared to other industries. The creative assets are clearly present - i.e. through skilled journalists employed in the sector - suggesting that the industry uses creative assets to produce its output. With strategic investment, this sector could leverage its existing creative capabilities to generate significant growth.

The final two industries - architectural/engineering activities and information services - represent "High Employment-Partially Creative Sectors." These industries may not have high concentrations of creative workers, but they employ large numbers of people across Sierra Leone. The creative talent they do hire includes engineering professionals, physical and engineering science technicians, architects, planners, surveyors, designers, electro-technology engineers, mathematicians, actuaries, statisticians, software developers, ICT support technicians, and printing trades workers. This extensive workforce provides a unique opportunity: even with relatively lower creative job intensity, these industries can generate growth through their sheer scale. By introducing more creative elements into these already robust industries, Sierra Leone may be able to scale its creative economy.

Caveats:

While the 2014 Labor Force Survey and 2018 Integrated Household Survey may be outdated, they remain the most detailed sources available for occupational data in Sierra Leone. The methodology described here can be updated as newer data becomes available. In any case, the estimates derived from these sources are indicative and intended to support prioritization decisions, rather than serve as definitive measures of the creative economy.

Table 3. Creative Intensity in Sierra Leone's Creative Economy

Category	2dgt	4dgt	ISIC Activity	Creative industry	Creative intensity (%)	Total employed	% to women total employed	% youth to total employed	Examples of creative workers hired in this industry
Creative Strongholds									
Core	59	5914	Motion picture, video and television programme production, sound recording and music publishing activities	Audiovisual & Media; Music	100	1647	0%	49%	Film, stage and related directors and producers
Core	90	9000	Creative, arts and entertainment activities	Performing Arts	66.9	1251	27%	11%	Creative and performing artists; Artistic, cultural and culinary associate professionals; Handicraft workers; Printing trades workers
Core	60	60	Programming and broadcasting activities	Audiovisual & Media	40.8	1370	32%	0%	Information and communications technology service managers; Authors, journalists and linguists; Creative and performing artists; Telecommunications and broadcasting technicians

Unlocking Sierra Leone's Creative Future

Category	2dgt	4dgt	ISIC Activity	Creative industry	Creative intensity (%)	Total employed	% to women total employed	% youth to total employed	Examples of creative workers hired in this industry
Core	70	70	Activities of head offices; management consultancy activities	n/a	23.6	1373	44%	19%	Professional services managers; Architects, planners, surveyors and designers
Broad	20	20	Manufacture of chemicals and chemical products	Crafts	35,20%	5802	98,20%	3,70%	Craft and related workers, n.e.c.
High creative intensity-low employment									
Core	58	5813	Publishing of newspapers, journals and periodicals	Publishing	100	358	0%	0%	Journalists
Core	18	1820	Reproduction of recorded media	Music	100	179	0%	0%	Sign writers, decorative painters, engravers and etchers
Core	73	7320	Market research and public opinion polling	Advertising & Marketing	73.6	243	0%	26%	Advertising and marketing professionals
Core	74	7420	Photographic activities	Visual Arts	71.9	220	0%	0%	Photographers
Core	91	91	Libraries, archives, museums and other cultural activities	Cultural Heritage	52.9	167	53%	0%	Librarians, archivists and curators
Broad	26	2670	Manufacture of optical instruments and photographic equipment	n/a	100.00%	65.473335	0.00%	0.00%	Photographers
Broad	93	9329	Other amusement and recreation activities n.e.c.	Performing Arts	73.60%	243.134	0.00%	26.40%	Actors; Creative and performing artists, n.e.c.
High Employment-partially creative sectors									
Core	71	71	Architectural and engineering activities; technical testing and analysis	n/a	15.3	4562	0%	9%	Engineering professionals (excluding electro-technology); Physical and engineering science technicians; Architects, planners, surveyors and designers; Electro-technology engineers; Mathematicians, actuaries and statisticians
Core	63	63	Information service activities	n/a	19.4	2615	5%	47%	Software and applications developers and analysts; Information and communications technology operations and user support technicians; Printing trades workers

Category	2dgt	4dgt	ISIC Activity	Creative industry	Creative intensity (%)	Total employed	% to women total employed	% youth to total employed	Examples of creative workers hired in this industry
Core	62	62	Computer programming, consultancy and related activities	n/a	19.3	915	12%	13%	Software and applications developers and analysts; Information and communications technology operations and user support technicians; Printing trades workers
Broad	61	61	Telecommunications	n/a	13.00%	5020	18.20%	20.40%	Information and communications technology operations and user support technicians; Software and applications developers and analysts; Sales, marketing and public relations professionals; Telecommunications and broadcasting technicians
Broad	16	16	Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	Crafts	9.20%	4898.0818	9.40%	2.80%	Handicraft workers in wood, basketry and related materials
Broad	32	32	Other manufacturing	n/a	4.40%	8974.1265	21.40%	11.40%	Sales, marketing and public relations professionals; Blacksmiths, toolmakers and related trades workers
Broad	13	13	Manufacture of textiles	Fashion & Textiles	3.20%	2396.7259	81.70%	4.30%	Handicraft workers
Broad	14	1410	Manufacture of wearing apparel, except fur apparel	Fashion & Textiles	0.00%	8736.6625	28.40%	7.10%	Tailors, dressmakers, furriers and hatters

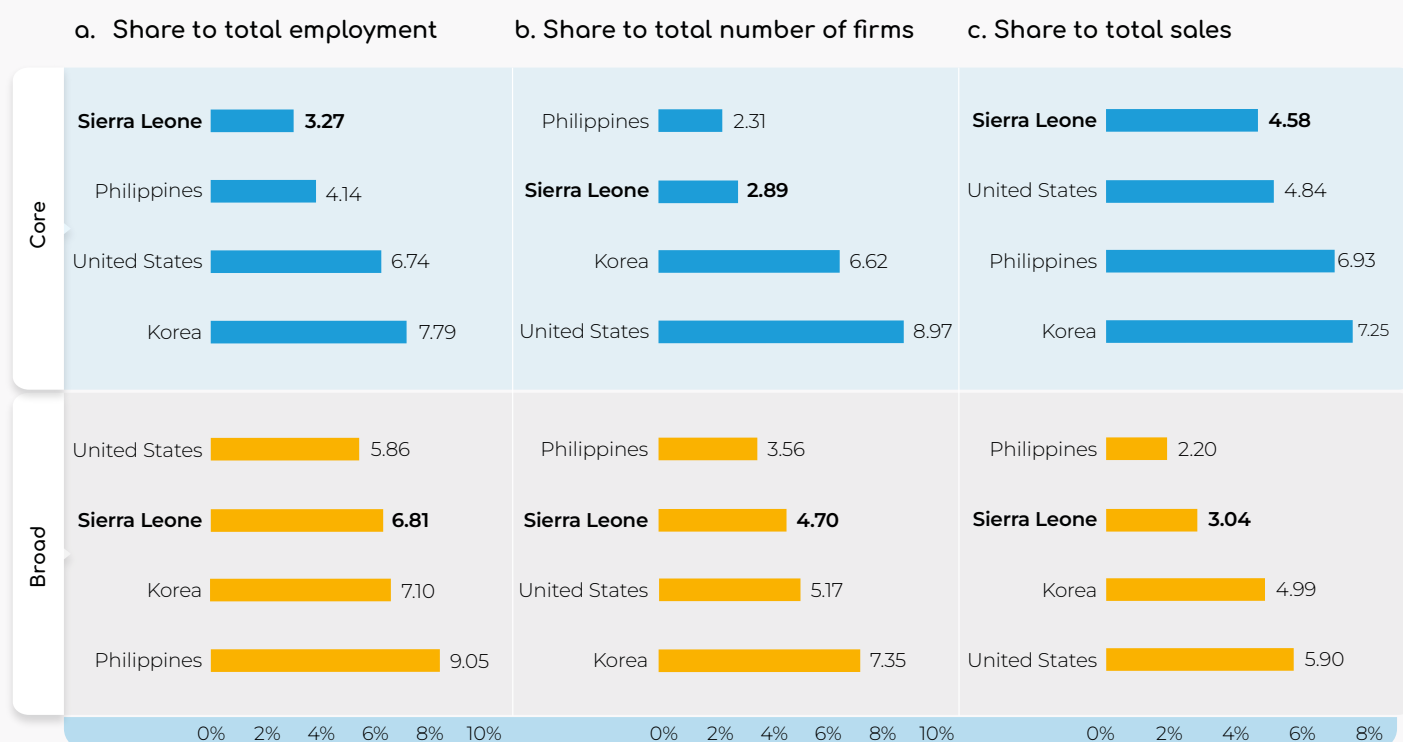
Employment contribution

Using the approach discussed in the previous section, this section provides an estimate of the size of Sierra Leone's creative economy. We use the 2022 Sierra Leone Census of Establishments to estimate the share of creative economy to total employment, total number of establishments, and sales. Next, the findings for Sierra Leone are benchmarked to three countries where we have access to establishment level data: the United States and Korea, which will serve as aspirational comparators, and the Philippines.

Core creative industries make a significant contribution to Sierra Leone's economy, accounting for 3.3 percent of total employment, 3 percent of all firms, and 3 percent of total sales from core creative industries. While these figures are smaller than those in the

United States and Korea, they are comparable to the Philippines. This reflects a global trend: developing countries often have limited capabilities in knowledge-intensive and digital sectors (such as motion picture production and computer programming) that comprise core creative industries. However, Sierra Leone shows more substantial contribution from broad creative industries—approximately 7 percent of total employment, 4.7 percent of firms, and 5 percent of total sales. The Philippines exhibits a similar pattern, with broad creative industries exceeding core creative industries in economic contribution. This points to a second important trend: while developing countries may have limitations in core creative industries, they potentially have significant growth opportunities by leveraging broad creative industries where they possess better resource endowments.

Figure 11. Size of the creative economy



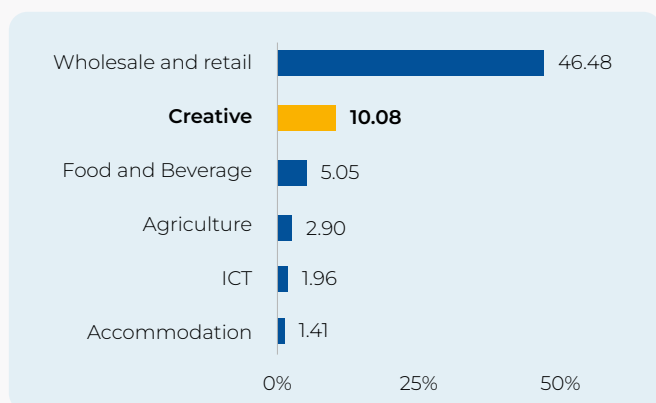
Sources: Sierra Leone: 2022 Census; Philippines: Annual Survey of Philippine Business and Industry (ASPBI) 2018 (with survey weights); South Korea: 2020 Economic Census; United States: 2017 Economic Census.

Creative industries (both core and broad) are among the largest contributors to employment in Sierra Leone's formal sector. They are second only to wholesale and retail in terms of both firm numbers and total employment. The creative industries account for 10 percent of total formal employment, surpassing traditional sectors like food and beverage, and agriculture (Figure 3). However, this pattern does not extend to

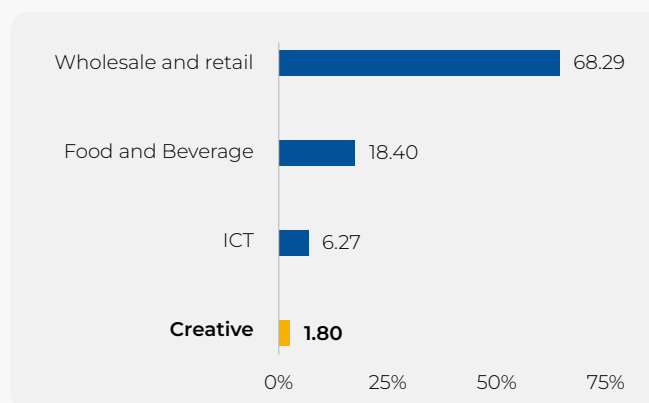
tiny establishments, which are typically informal businesses. In the informal sector, wholesale and retail or food and beverage operations predominate in both establishment⁷⁹ numbers and worker employment, while creative industries have minimal presence. This contrast highlights the significant role creative industries play specifically within Sierra Leone's formal economy and employment landscape.

Figure 12. Sector comparison in Sierra Leone

a. Share to total employment · regular firms

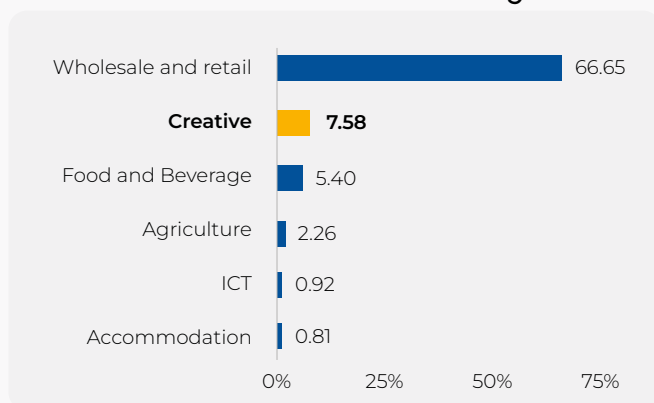


b. Share to total employment · tiny firms

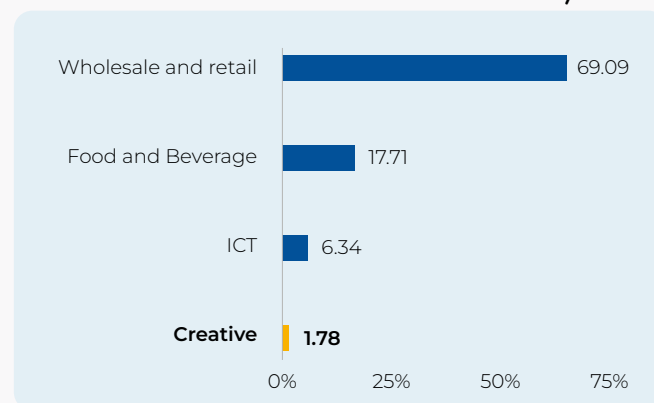


⁷⁹Tiny establishments are bafra's and temporary informal stalls based on the definition used by the Statistics Sierra Leone.

c. Share to total number of firms · regular firms



d. Share to total number of firms · tiny firms



Sources: Statistics Sierra Leone Census (2022)

Note: Regular business establishments consisted of a permanent or semi-permanent construction like a building, kiosk or permanent stall. Tiny establishments are bafas and temporary informal stalls. All tiny firms in the ICT sectors in panel b and d come from ISIC 9512 – Repair of communication equipment, which includes (but is not exclusive to) repair of cellular phones.

Economic contribution

To establish a preliminary quantitative analysis of the creative economy's economic contribution, GDP data was used to estimate the impact of the creative economy in relation to its contribution to the economy. It is important to note that this is an indicative top-down analysis, the figures should be interpreted as indicative rather than definitive. More importantly, these preliminary calculations enable a deeper understanding of the potential size of different industries implicated across the creative economy.

Analysis of the creative economy's contribution to GDP was assessed using the following key sources of data:

- GDP data from the Statistics Sierra Leone's Report on the Rebased Gross Domestic Product (GDP) at 2018 Prices (June 2024) - GDP at constant prices, years 2018 – 2023
- International Standard Industrial Classification (ISIC) of All Economic Activities, Revision 3, of the Department of Economic and Social Affairs of the United Nations Secretariat (2008)

Sierra Leone's GDP data is compiled using the ISIC (Revision 4) classification, as well as the System of National Accounts. GDP data is therefore presented using the ISIC division of distinct economic activities. GDP data presented by the Statistics Sierra Leone is

set out at the Section level (with some exceptions – see Caveats below). Based on the detailed classification and definitions of these divisions provided by ISIC, estimates have been made on the %age of GDP can be allocated to different creative industries.

Based on this reasoning, the quantification of the creative contributions to GDP were calculated using the following steps:

- Defining which of the 'Section' level activities provided by Statistics Sierra Leone are related to the creative industries
- For each relevant section, establishing all division level activities set out in the ISIC classification
 - This total number of divisions was used as the basis for the total GDP provided by Statistics Sierra Leone.
 - For example, the 'Information and Communication' section includes 6 distinct divisions, all accounting for 2,130,393 m Le in 2023.
- Based on the ISIC definitions each Division, including details provided at the Group and Class level, the defined creative industries were assigned to relevant Divisions
 - For example, the 'publishing' industry was assigned to the *Division 58: Publishing activities within "Information and Communications"*
- The different creative industries can be assigned to multiple divisions or sections where applicable, providing a level of nuance to cover all relevant activities related to that industry.

- For example, the 'Music' industry can be assigned to both *Manufacturing Division 18 'Printing and reproduction of recorded media'*, and *Information & Communication Division 59 '[...] sound recording and music publishing activities'*
- Based on this assignment of creative industries to the different divisions, an estimate of the percentage of that section which can be assigned to the creative industries can be calculated.
 - For example, of the 6 distinct divisions within '*Information and Communication*', 4 are related to distinct creative industries. Based on this, a proportional assessment of the total GDP for *Information and Communications* can be assigned to the creative industries.
- If the ISIC definition of a division includes a broad array of groups and classes, not all of which relate to the creative industries, the assigned proportion is reduced accordingly.

Based on this methodology, a proportional percentage of the Section GDP data provided by Sierra Leone can be calculated to estimate the contribution of different creative industries to the economy. The breakdown of 10 creative industries is included below. (Note: Due to availability of GDP data and ISIC definitions, the GDP estimations do not include the three following creative industries: culinary arts, pageantry and beauty & cosmetics.)

Table 4. Proportional % of ISIC sections assigned to each creative industry

ISIC Section provided by Statistics Sierra Leone					
Creative industry	Manufacturing	Other services	Information & Communication	Professional, technical and Admin Support Services	Education
Advertising	-	-	-	7.7%	-
Audiovisual	-	-	25.0%	-	-
Cultural education	-	-	-	-	6.7%
Cultural heritage	-	11.1%	-	-	-
Crafts	14.4%	-	-	-	-
Fashion & textiles	15.4%	-	-	-	-
Music	1.9%	-	8.3%	-	-
Performing arts	-	16.7%	-	-	-
Publishing	-	-	16.7%	-	-
Visual arts	-	-	-	7.7%	-

Source: Consultants' Analysis

A further detailed breakdown of the creative industry assignments at the division level is included below.

Table 5. Creative industries at division level

GDP activities (Sierra Leone GDP at Constant Prices)	Section Name ISIC4	Division #	Division Name	Creative Industry Assigned	Proportion if not 100%
2.2. Manufacturing	Manufacturing	10	Manufacture of food products	N/A	
2.2. Manufacturing	Manufacturing	11	Manufacture of beverages	N/A	
2.2. Manufacturing	Manufacturing	12	Manufacture of tobacco products	N/A	
2.2. Manufacturing	Manufacturing	13	Manufacture of textiles	Fashion & Textiles	
2.2. Manufacturing	Manufacturing	14	Manufacture of wearing apparel	Fashion & Textiles	
2.2. Manufacturing	Manufacturing	15	Manufacture of leather and related products	Fashion & Textiles	
2.2. Manufacturing	Manufacturing	16	Manufacture of wood and of products of wood and cork, except furniture	Crafts	50%
2.2. Manufacturing	Manufacturing	17	Manufacture of paper and paper products	Crafts	
2.2. Manufacturing	Manufacturing	18	Printing and reproduction of recorded media	Music	50%
2.2. Manufacturing	Manufacturing	19	Manufacture of coke and refined petroleum products	N/A	

GDP activities (Sierra Leone GDP at Constant Prices)	Section Name ISIC4	Division #	Division Name	Creative Industry Assigned	Proportion if not 100%
2.2. Manufacturing	Manufacturing	20	Manufacture of chemicals and chemical products	Crafts	33%
2.2. Manufacturing	Manufacturing	21	Manufacture of pharmaceuticals, medicinal chemical and botanical products	N/A	
2.2. Manufacturing	Manufacturing	22	Manufacture of rubber and plastics products	N/A	
2.2. Manufacturing	Manufacturing	23	Manufacture of other non-metallic mineral products	Crafts	50%
2.2. Manufacturing	Manufacturing	24	Manufacture of basic metals	N/A	
2.2. Manufacturing	Manufacturing	25	Manufacture of fabricated metal products, except machinery and equipment	N/A	
2.2. Manufacturing	Manufacturing	26	Manufacture of computer, electronic and optical products	N/A	
2.2. Manufacturing	Manufacturing	27	Manufacture of electrical equipment	N/A	
2.2. Manufacturing	Manufacturing	28	Manufacture of machinery and equipment n.e.c.	N/A	
2.2. Manufacturing	Manufacturing	29	Manufacture of motor vehicles, trailers and semi-trailers	N/A	
2.2. Manufacturing	Manufacturing	30	Manufacture of other transport equipment	N/A	

GDP activities (Sierra Leone GDP at Constant Prices)	Section Name ISIC4	Division #	Division Name	Creative Industry Assigned	Proportion if not 100%
2.2. Manufacturing	Manufacturing	31	Manufacture of furniture	Fashion & Textiles	
2.2. Manufacturing	Manufacturing	32	Other manufacturing	Crafts	75%
2.2. Manufacturing	Manufacturing	33	Repair and installation of machinery and equipment	N/A	
3.4. Information & Communication	Information and communication	58	Publishing activities	Publishing	
3.4. Information & Communication	Information and communication	59	Motion picture, video and television programme production, sound recording and music publishing activities	Audiovisual	50%
3.4. Information & Communication	Information and communication	59	Motion picture, video and television programme production, sound recording and music publishing activities	Music	50%
3.4. Information & Communication	Information and communication	60	Programming and broadcasting activities	Audiovisual	
3.4. Information & Communication	Information and communication	61	Telecommunications	N/A	
3.4. Information & Communication	Information and communication	62	Computer programming, consultancy and related activities	N/A	
3.4. Information & Communication	Information and communication	63	Information service activities	N/A	

GDP activities (Sierra Leone GDP at Constant Prices)	Section Name ISIC4	Division #	Division Name	Creative Industry Assigned	Proportion if not 100%
3.7. M&N: Professional, technical and Admin Support Services	Professional, scientific and technical activities	69	Legal and accounting activities	N/A	
3.7. M&N: Professional, technical and Admin Support Services	Professional, scientific and technical activities	70	Activities of head offices; management consultancy activities	N/A	
3.7. M&N: Professional, technical and Admin Support Services	Professional, scientific and technical activities	71	Architectural and engineering activities; technical testing and analysis	N/A	
3.7. M&N: Professional, technical and Admin Support Services	Professional, scientific and technical activities	72	Scientific research and development	N/A	
3.7. M&N: Professional, technical and Admin Support Services	Professional, scientific and technical activities	73	Advertising and market research	Advertising	
3.7. M&N: Professional, technical and Admin Support Services	Professional, scientific and technical activities	74	Other professional, scientific and technical activities	Visual arts	
3.7. M&N: Professional, technical and Admin Support Services	Professional, scientific and technical activities	75	Veterinary activities	N/A	
3.7. M&N: Professional, technical and Admin Support Services	Administrative and support service activities	77	Rental and leasing activities	N/A	
3.7. M&N: Professional, technical and Admin Support Services	Administrative and support service activities	78	Employment activities	N/A	
3.7. M&N: Professional, technical and Admin Support Services	Administrative and support service activities	79	Travel agency, tour operator, reservation service and related activities	N/A	
3.7. M&N: Professional, technical and Admin Support Services	Administrative and support service activities	80	Security and investigation activities	N/A	
3.7. M&N: Professional, technical and Admin Support Services	Administrative and support service activities	81	Services to buildings and landscape activities	N/A	

GDP activities (Sierra Leone GDP at Constant Prices)	Section Name ISIC4	Division #	Division Name	Creative Industry Assigned	Proportion if not 100%
3.7. M&N: Professional, technical and Admin Support Services	Administrative and support service activities	82	Office administrative, office support and other business support activities	N/A	
3.11. Other services (RST)	Arts, entertainment & recreation	90	Creative, arts and entertainment activities	Performing arts	
3.11. Other services (RST)	Arts, entertainment & recreation	91	Libraries, archives, museums and other cultural activities	Cultural heritage	
3.11. Other services (RST)	Arts, entertainment & recreation	92	Gambling and betting activities	N/A	
3.11. Other services (RST)	Arts, entertainment & recreation	93	Sports activities and amusement and recreation activities	Performing arts	
3.11. Other services (RST)	Arts, entertainment & recreation	94	Activities of membership organizations	N/A	
3.11. Other services (RST)	Other service activities	95	Repair of computers and personal and household goods	N/A	
3.11. Other services (RST)	Other service activities	96	Other personal service activities	N/A	
3.11. Other services (RST)	Activities of households as employers	97	Activities of households as employers of domestic personnel	N/A	
3.11. Other services (RST)	Activities of households as employers	98	Undifferentiated goods- and services	N/A	
3.9. Education	Education	851	Pre-primary and primary education	N/A	
3.9. Education	Education	852	Secondary education	N/A	
3.9. Education	Education	853	Higher education	N/A	
3.9. Education	Education	854	Other education	Cultural education	30%
3.9. Education	Education	855	Educational support activities	N/A	

Caveats:

To follow this methodology, an assumption was made that all divisions classified by ISIC are relevant to Sierra Leone and the associated GDP data. For this methodology to be fully validated, it will be necessary to discuss with Statistics Sierra Leone their process for GDP definition.

It is also important to note that GDP data provided by Statistics Sierra Leone occasionally groups different divisions together as part of the data it provides. For example, Section M 'Professional, Scientific and Technical Activities' and Section N 'Administrative and Support Service Activities' have been grouped into one line of activity.

Whilst this does not impact the methodology used, it will be important to understand the reasonings behind these groupings to better define the proportions to be allocated for each creative industry.

Benchmarking:

To assess the validity of these high-level estimates, similar calculations were completed for other benchmark countries in the region where GDP data exists. All figures are derived using 2023 GDP data and sector classification following the ISIC (Revision 4). The selected benchmarks include:

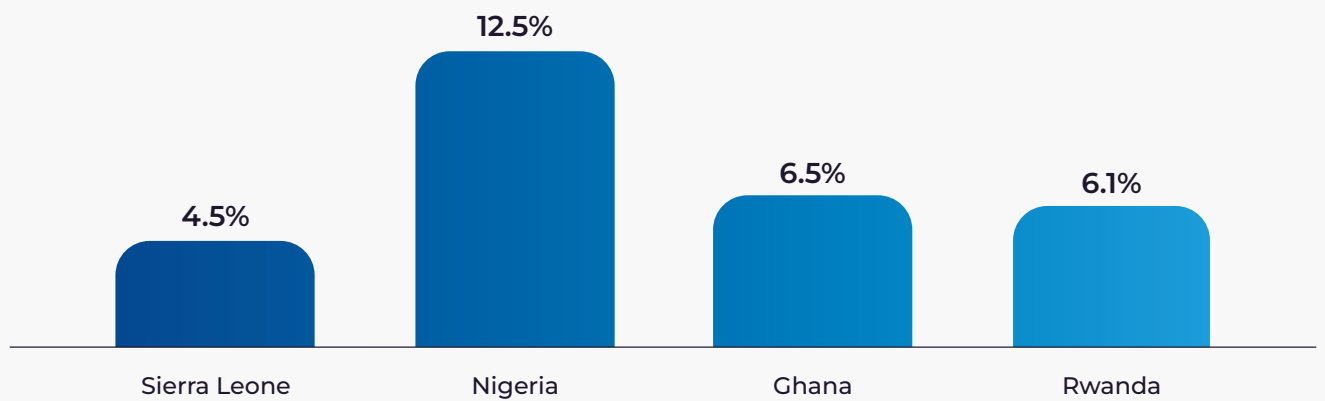
- Nigeria, which has one of the most well-established creative economies on the continent.

- Ghana, a nearby country with a larger economy overall, with some focused efforts to build their creative economies, albeit not as established as Nigeria.
- Rwanda, which also has a relatively small economy, has made recent significant strides to promote their creative economy.

Using the same methodology on available GDP data across these three benchmark countries highlights comparable results. Nigeria shows a significantly higher proportion of the economy being related to creative industries (12.5%). Whilst this is high, Nigeria does have a more established creative industry which covers several industries, especially related to audio-visual and multimedia, such as its Nollywood film industry.

On the other hand, Ghana and Rwanda show similar proportions, with approximately 6.5 percent and 6.1 percent respectively of their economies arising from creative activities. Ghana has not been as evident in its promotion of the creative economy compared to Nigeria, although it has an established framework, for example through the Ministry of Tourism, Culture and Creative Arts, and the associated Creative Arts Agency. Whilst Rwanda has a smaller economy, it has made significant strides in promoting and growing its creative economy in recent years.

Figure 13. Economic Contribution Benchmarking – Estimations of Creative Economy as percent of GDP



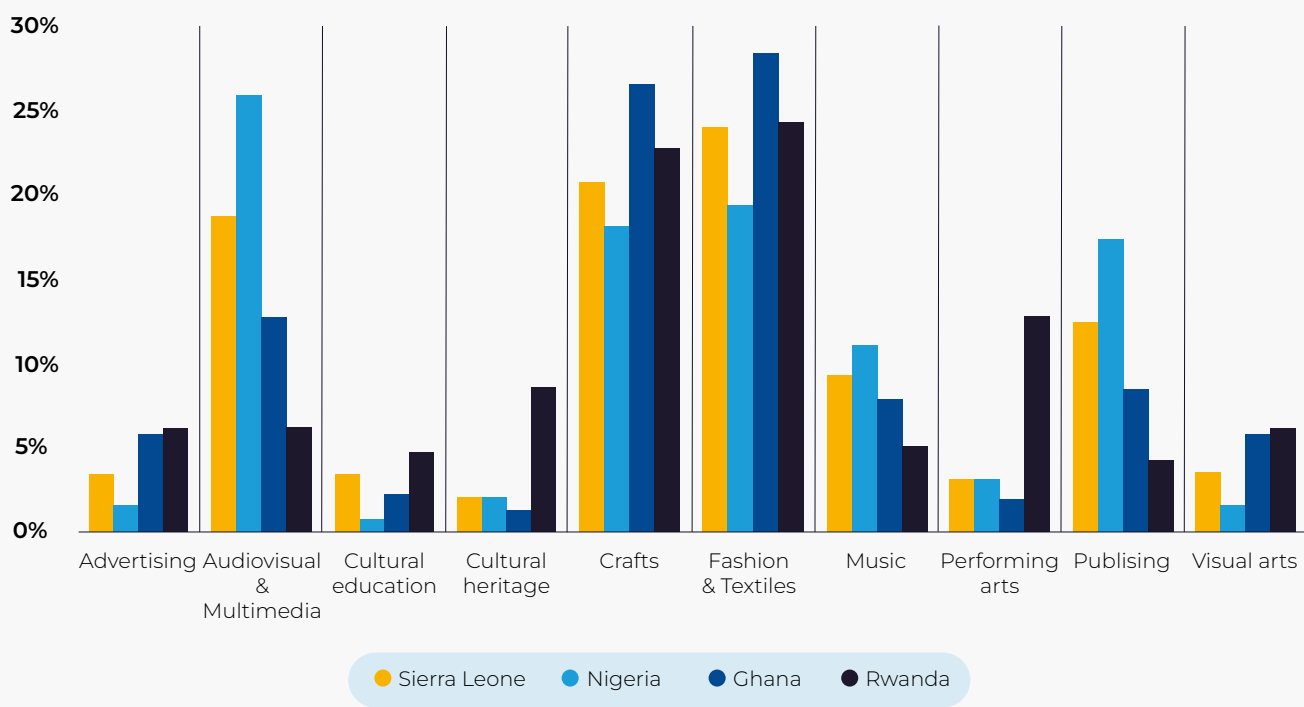
Source: Estimates based on Sierra Leone GDP Data 2023, Nigeria GDP Data 2023, Ghana GDP Data 2023, and Rwanda GDP Data 2023, using the applied methodology; ISIC (Rev. 4)

On this basis, the results seem to indicate that these calculations represent a sufficient estimation of creative industries (it is important to note that this remains an estimation). However, it remains important to consider the individual industries as well. At this level, some nuances (both positive and negative) can be applied.

For example, the methodology clearly highlights the fact that Nigeria's creative economy is dominated by

the audiovisual & media industry, which include film and television production. On the other hand, fashion & textiles and crafts are dominant across all countries – this is due to the fact that both industries are based purely on manufacturing activities in this methodology, which may be overestimated if the country has a significant manufacturing industry beyond the creative elements, such as food and beverage, machinery and other manufacturing activities which are considered within the ISIC definitions.

Figure 14. Economic Contribution Benchmarking - Breakdown of Creative Economies by Industry



Source: Estimates based on Sierra Leone GDP Data 2023, Nigeria GDP Data 2023, Ghana GDP Data 2023, and Rwanda GDP Data 2023, using the applied methodology; ISIC (Rev. 4)

However overall, the benchmarking results highlight positive indications that these high-level estimations are sufficient to provide an indication of a country's creative contributions to the overall economy, as well as a broad breakdown of different creative industry

sizes. These results should not be taken as validated quantified sizes of the creative economy, but rather to support analysis and consideration of different areas for priority or strengthening.

Annex IV: Analysis of IP Regulatory Environment

Overview of the Current Legal Framework

Sierra Leone has foundational IP laws including:

- i. The Trade Marks Act, 2014 – provides protection for trade mark (any sign or combination of signs capable of distinguishing the goods or services of one undertaking from another, and includes words such as personal names, letters, numerals and figurative elements); – provides protection for collective mark (a visible sign capable of distinguishing, from the goods or services of other enterprises the origin or any other common characteristic including the quality of goods or services different enterprises which use the sign under the control of a registered owner).
- ii. The Copyright Act, 2011 – provides protection for any literary, artistic, musical, sound recordings, audiovisual, choreographic, derivative works, program-carrying signals; and computer software and programs.
- iii. The Patents and Industrial Designs Act, 2012 – grants patent to an invention (an idea of an inventor which permits in practice a solution to a specific problem in the field of technology) if it is new, involves an inventive step and is industrially applicable – provides protection for industrial design which is any composition of lines or colours or any three dimensional material, whether or not associated with lines or colours, provided that such a composition, form or material gives a special appearance to a product of industry or handicraft, can serve as a pattern for a product of industry or handicraft and appeals to and is judged by the eye.

Sierra Leone is a Member State of the African Regional Intellectual Property Organization (ARIPO) and the World Intellectual Property Organization (WIPO). The country has also signed and acceded to several treaties, including the TRIPS Agreement, the Convention on Biological Diversity, Cartagena Protocol on Biosafety to the Convention on Biological Diversity, the Patent Cooperation Treaty, Paris Convention for the Protection of

Industrial Property, Harare Protocol on Patents and Industrial Designs within the framework of ARIPO amongst others. However, Sierra Leone is not a signatory to the Berne Convention for the protection of Literary and Artistic Rights and this places a limit on cross-border IP enforcement.

Institutional Landscape

Institution	Role	Current Status
Office of the Administrator & Registrar General	Registers trademarks, designs, copyrights	Manual, paper-based, no digital registry
Ministry of Trade & Industry	IP policy leadership	Limited coordination with creative industries
Ministry of Tourism & Cultural Affairs	Creative economy policy, restructuring	Merging cultural & CI policies
Judiciary & Police	IP enforcement	Low capacity, few prosecutions
Law Reform Commission	Legislative Updates	Not yet engaged on IP reforms

Key Strengths

- i. Foundational IP legislation exists.
- ii. Draft CMO regulations indicate imminent reform.
- iii. Membership in ARIPO promotes regional collaboration.

Institutional Landscape

- i. No centralized or digital IP registry.
- ii. CMO not in operation.
- iii. Low awareness about IP and its benefits among creatives
- iv. Lack of multi-agency/departmental collaboration.
- v. High costs and procedural complexity discourage IP registration.
- vi. Limited political will to leverage the creative industries' economic potential

BENCHMARKING, GAPS, AND OPPORTUNITIES

Overview of the Copyright Act, 2011

The Copyright Act, 2011 is the main piece of legislation offering protection for the works of creatives (authors, composers, choreographers, screenwriters, film directors, and other creators of literary, musical, dramatic, and artistic works). It grants them the exclusive rights to reproduce and distribute their works, perform or communicate works to the public and license third parties for commercial exploitation. According to the Copyright Act, the duration of protection is generally the author's life plus 50 years (longer for certain works). The Registrar whom the Copyright Act defines as the Registrar of IP is responsible for the administration of the said Act and is responsible for all matters affecting copyright in Sierra Leone. In practice however, these functions vest in the Registrar General at the Office of the Administrator & Registrar General (OARG). The Minister (Minister responsible for trade), has the overall responsibility to make regulations related to registration procedures and deposition of works and generally for carrying into effect the provision of the Copyright Act; including the establishment of the Collecting Society.

Despite this framework, there are a lot of implementation, digitization and institutional coordination gaps. The Act's full operations has been hampered by the lack of effective enforcement mechanisms, a CMO and organized public education.

Benchmarking and Opportunities for Improvement (The Copyright Act, 2011)

- I. Registration and Digital Registry – the current status of registration is paper-based and copy-

right protection is understood to be granted for a period of 2 years (though the Act provides longer protection based on authorship), on a voluntary basis, requiring submission of personal details and two copies of the work, and an affidavit. In Kenya, the Copyright Board offers an online registration portal (<https://copyright.go.ke/our-services/copyright-registration>). The World Intellectual Property Organization (WIPO) has developed WIPO Connect, a software solution designed to support small IP protection and collection organizations.

- Develop a digital IP registry with public search access and auto-notifications for expiration and renewal, and consider adopting WIPO Connect to ensure alignment with international standards and facilitate future regional interoperability.

- II. Enforcement Mechanism – There is no dedicated IP enforcement unit so therefore enforcement requires an ad hoc collaboration between the police and the National Revenue Authority and very few infringement cases reach the courts. There is also no specialized IP court or tribunal. Countries like South Africa (the IP Arbitration Center of South Africa – IPACSA – resolving IP disputes through arbitration) and Zimbabwe have IP Tribunals (<https://ictpolicyafrica.org/en/document/uda91cs29kj?page=2>).

- Create an IP enforcement task force, train police and legal representatives (including judges) and consider establishing an IP tribunal to handle IP disputes.

- III. Public Awareness and Outreach – There is low awareness of IP protection and processes amongst creatives. Many creators do not register their works or know how to license them. The Ghana Music Rights Organization (GHAMRO) – one out of three Collecting Societies – is a royalties collection agency in Ghana, conducts regular roadshows and educational workshops, though monitoring remains costly.

- Launch a national IP awareness campaign led by the IP offices (OARG/Ministry of Tourism).

- IV. While the Copyright Act provides a solid background for safeguarding individual rights, one of its most transformative and yet unrealized provisions is the establishment of a Collective Management Organization (CMO). The CMO is a vital opportunity and challenge given its potential to centralize licensing, provide fair remuneration, and support creators across Sierra Leone.

- Senegal provides a valuable model through its CMO, SODAV, which has been supported by the World Bank Group. Unlike most West African IP societies—which are state-owned—SODAV operates independently and could serve as a benchmark for Sierra Leone's CMO set-up. SODAV is undergoing digital transformation, is preparing to implement a private copying levy, and recently signed a cross-border agreement with the South African CMO to collect revenues from GAFAM (Google, Apple, Facebook, Amazon, and Microsoft). Expertise from SODAV could be directly leveraged to support Sierra Leone's CMO design and implementation.

In-Depth Focus: The Status and Role of the Collective Management Organization (CMO)

Legal Foundation and Functions

The Copyright Act, 2011 makes provision for a collecting society in Sierra Leone which is envisioned as the formal Collective Management Organization (CMO) for authors and owners of copyright in Sierra Leone. The Act gives the Collecting Society both the mandate and operational structure to function as Sierra Leone's only statutory CMO. It is empowered to enter contracts, acquire property, collect royalties and act as an intermediary between creators and users. It is to also administer public performance rights, manage contracts, distribute royalties, and provide guidance to its members. A governing Board is also created by the Act, including representatives from the Musicians Union, film industry and the Registrar.

Despite the Copyright Act's clear provisions, implementation remains stalled. According to the OARG, the regulations to operationalize IP laws (inclusive of the Collecting Society) are in final draft but not yet gazetted. No funding or staffing has been allocated to activate the CMO. The registry remains paper-based, and no digital royalty or licensing system is in place. Creators remain without access to collective licensing, royalty distribution, or contract intermediation services. The creative economy in Sierra Leone is significantly impacted by this institutional gap. International collaborations are impossible, royalties unpaid and rights are not enforced in the absence of a functional CMO. If establishment support is secured, the CMO should rapidly consider implementing a private copying levy system which could significantly increase revenue collection for creators by compensating for personal-use duplications of copyrighted works.

Monitoring Mechanisms

Due to the absence of a CMO there is:

- No broadcast or live-performance tracking.
- No metadata tagging at point of registration.
- No industry agreements for playlist reporting.

Therefore, it is recommended to:

- Adopt audio fingerprinting software to track airplay (e.g., ACRCLOUD).
- Partner with radio stations, telcos, and ISPs for real-time data sharing.
- Develop a mobile app for licensees to self-report usage.
- Work on the private copying law project to optimize IP revenues
- Setup an agreement with a stronger IP organization to collect GAFAM revenues for Sierra Leone creators

Enforcement Gaps and Tools

Some of the current gaps include:

- No CMO enforcement unit.
- Low capacity for litigation, no deterrent fines hence the spike in piracy and non-payment of royalties for registered works.
- No licensing enforcement at live events or public venues.

To help fill in these gaps with the coming into force of a CMO:

- An IP Legal Advisory Unit should be set up within the CMO.
- A standard licensing agreement for broadcasters, DJs, event organizers and venues must be launched.
- A legal-aid scheme for artists pursuing infringement cases must be created.

Category	Need
Human Resources	Director, Licensing Officer, Legal Counsel, IT Officer, Data Analyst
Technology	Online registration system, monitoring dashboard, Blockchain ledger
Training & Outreach	Workshops for creators, police, broadcasters & judiciary
Legal & Institutional	Finalize regulations, publish in gazette, establish enforcement protocols, determine the Ministry/department primarily responsible for IP

CURRENT IP PROCESSES & METRICS

Current IP Metrics – May 2025 (Source: OARG)

Indicator	Total registered to date
Trademarks	25,952
Copyrights	5
Patents	0
Industrial designs	8

Responsible Institutions

Institution	Role
Office of the Administrator & Registrar General (OARG)	Handles registration of all IP rights. Primary national IP body
Ministry of Trade & Industry	Sets IP policy and drafts regulations. Oversees copyright Implementation
Ministry of Tourism & Cultural Affairs	Coordinates creative economy policies and cultural sector development
Law Reform Commission	Expected to review and revise outdated IP laws. Has not yet taken initiative
Judiciary of Sierra Leone	Handles IP disputes under general civil law or at the Fast Track Commercial Court. No specialized court Handles IP disputes under general civil law or at the Fast
Sierra Leone Police & National Revenue Authority (NRA)	Collaborate on enforcement only when prompted. No IP-specific units.



Annex V: Analysis of Gender Inclusion in Creative Economy

Introduction

Sierra Leone's creative economy represents a dynamic yet underutilized space for economic growth and cultural expression. However, despite the creative economy's potential, women continue to be disproportionately affected by barriers such as safety concerns, limited access to financing, lack of recognition and insufficient infrastructure. Women creatives also contend challenges associated with societal norms, economic barriers and infrastructural deficiencies. Amidst these challenges, several organizations are spearheading impactful initiatives to promote gender inclusion such as Cultural Heritage Alliance (CHA), Salone Film Union, Ministry of Youth Affairs, Ministry of Industry and Trade, World Bank. This analysis contributes to a diagnostic study of Sierra Leone's creative economy whose main purpose is to analyse Sierra Leone's creative economy, by identifying and quantifying its opportunities and challenges. This examination investigates the specific obstacles women face, highlights significant initiatives in promoting equity and explores opportunities to establish safe, inclusive creative hubs in Sierra Leone.

Assessment of barriers faced by women in the creative industries

Societal Restrictions, Cultural Norms and Attitudes

Sierra Leone is a patriarchal society, and women creatives face significant societal restrictions, negative cultural norms and attitudes that affect them in their professions. As a result of these societal restrictions, women creatives' work is usually stigmatized and trivialized as either a hobby or worse still as illegitimate side hustle or fallback option⁸⁰. Grin UK⁸¹ reports that;

"Throughout history women have always contributed to the evolution of design, yet many of these achievements have been forgotten inaccurately recorded or even completely unaccounted for in comparison to their male counterparts."

This discourages many women from committing to the creative economy fully. Deeply ingrained gender norms and attitudes relegate women to secondary roles such as backup singers in music bands, and choreographers, with few opportunities to play instruments or to take up leadership roles such as band leaders and producers⁸². In the film industry, women are mostly relegated to minor acting or support roles. Similarly in other creative industries women are most-

ly not socially and culturally accepted as legitimate professionals, reflecting the broader tendency to look down on women as supportive rather than leading⁸³. Gender stereotypes, lack of social capital and work life balance combine to present challenges to women, even in leveraging opportunities presented by digital technology. This is largely because women are traditionally confined to domestic roles. As a result of these gender biases and patriarchal perspectives, women are excluded from high valued opportunities that their male counterparts are exposed to reinforcing patriarchal perceptions that women lack the expertise and professionalism required in the creative economy.

Limited Representation of Women in Decision Making Positions

Conversations with creatives confirmed that there are more men in senior creative positions, decision making and executive roles than women. Several creatives engaged during the study believed even when a male enters a female dominated sector, they tend to get higher positions faster than women⁸⁴. Even though there is a general perception of equal representation in music performance, women's representation in leadership roles such as solo artists, producers, promoters, and tour agents continue to be low⁸⁵. No comprehensive data on women in leadership positions in the creative economy was found, demonstrating the lack of gender analysis data in the sector. Several programs musical collaborations have attracted only a few young women demonstrating systemic disinterest or exclusion. Women's roles are significantly restricted to administrative execution including marketing rather than strategic decision making, and other supporting activities such as backup singers⁸⁶. Equally, in dance and theatre, women are underrepresented as choreographers or directors, with their contributions mostly overshadowed by their male counterparts. As a result of the underrepresentation of women in leadership roles, there is a general

⁸⁰ Interview Response – Ministry of Gender and Children Affairs official

⁸¹ Grin UK (2024) The role of women in the design industry. <https://grin.uk.com/grinsight/the-role-of-women-in-the-design-industry/#:~:text=Female%20creatives%20frequently%20encounter%20experiences%20early%20in,sense%20of%20fitting%20in%20within%20the%20industry>

⁸² Tabak C. (July 2023). Gender and Music: Gender Roles and the Music Industry. World Women Studies Journal.

⁸³ Wolfe, P. (2020). Women in the Studio. Creativity, Control and Gender in Popular Music Sound Production. Routledge

⁸⁴ Interview – Female Musician

⁸⁵ Rachel Powers (2025). Why the Gender Gap in Creative Leadership Matters and How to Close It. <https://www.linkedin.com/pulse/why-gender-gap-creative-leadership-matters-how-close-wolf-powers-nvaxc/>

⁸⁶ How can we fully unleash Women's Innovative Potential in the Cultural and Creative Sector? (2024). <https://keanet.eu/how-can-we-fully-unleash-womens-innovative-potential-in-the-cultural-and-creative-sector/#:~:text=They%20encounter%20limited%20access%20to%20decision%20making%20and,pay%20gap%20C%20to%20name%20but%20a%20few>

lack of mentorship and support for emerging women creatives. This limits their professional advancement opportunities and worsens the systemic inequalities in Sierra Leone's creative Industry.

Dominance in some industries over others

Many women in Sierra Leone are making great strides in the fashion industry, crafts and culinary arts while men dominate industries such as technical visual arts, filmmaking and production. These gender disparities perpetuate systemic inequalities. In the music industry, women mostly occupy supportive roles such as choreographers, secondary vocalists and dancers. Key roles such as music producers, and bandleaders are generally not accessible to women because these are perceived to be masculine jobs. The result is that many women struggle to set up as independent performances and face gendered barriers in accessing resources such as studios and production houses thus limiting their growth and influence in the creative industry⁸⁷. In the film industry, many women are less visible playing the roles of actresses or other support services, while more men are found in positions like directors, editors, cinematographers. This reflects gender disparities and leads to the underrepresentation of women's stories in the film industry, thus reinforcing patriarchy. Male dominance is also found in industries such as graphic designing, animation and digital arts which require advanced technological skills and innovation. Some musicians engaged during the study emphasized that some music genres are predominantly male dominated such as rock, jazz and R&B. Financial barriers, societal limitations and femininity expectations result in women's exclusion even in related collaborations and high valued networks. The dominance of men in various industries means that there are fewer women to act as role models or mentors for upcoming women creatives. This further marginalizes women, isolating them and restricting them to industries considered feminine.

Limited Access to High Value Networks

Many women creatives in Sierra Leone have limited access to high value networks typically made of industry leaders, collaborators and influential creative professions who can support them to advance their careers, enhance visibility and secure resources⁸⁸. Without the necessary high value networks, women's creatives rarely benefit from mentorship and formal apprenticeship programs, knowledge sharing platforms, professional connections and strategic partnership. Not only does this negatively impact their professional advancement but it also limits their opportunities to qualify for leadership and decision-making roles within the industry. For instance, in the music industry, male dominated cliques with access to performance venues and studios dominate the industry⁸⁹. Women's

lack of exposure to high value networks excludes them from engagements with industry donors, investors and funders willing to invest in their creatives. As a result, women struggle to grow their businesses due to difficulties in acquiring capital, sponsorships and grants. This also means that women creatives miss out participating in high profile events and exhibitions where they can amplify their visibility and enhance public recognition. They are therefore mostly sidelined; their work goes unnoticed and therefore undervalued. For instance, an average female publisher in Sierra Leone struggles to get connected with renowned publishers limiting the distribution and visibility of her work⁹⁰.

Skills Gap

In Sierra Leone, many women creatives rely on informal apprenticeship or self-teaching thus limiting the skills development of and advancement of women. The absence of dedicated formal institutions such as technical colleges, music and film schools to address the educational and training gaps that women face, presents significant barriers to the growth of women creatives⁹¹. With neither technical expertise nor certification women face fierce competition within the creative industry that inhibit them from gaining formal recognition of their talents. Thus, foreign workers with certification and expertise continue to flood the decision-making positions including occupying technical roles that local people can take if they receive the requisite training. For instance, in the fashion industry, many technical roles are occupied by foreigners even though there is a pool of untrained local women who have potential to take up these positions if exposed to capacity development⁹². This presents a major barrier to professionalization and competitiveness of local women creatives both in Sierra Leone and globally.

Intellectual Property and Monetization

The general absence of a strong Intellectual Property framework (IP) in Sierra Leone exposes women creatives to vulnerabilities such as exploitation and piracy. Many women creatives have had their work distributed without their content, misused and copied; and this is worsened by women creatives' limited access to legal resources. In the words of Turley Celia and Mahtani Sabrina (2012)

"Pirate DVD sellers roam the streets of Freetown and other urban areas."

Similarly, women creatives are disproportionately affected by the rampant piracy characterizing Sierra

⁸⁷ National Advisory Council on Women and Girls: Monthly Spotlight. (N.D): Gender Inequality in the Creative Arts.

⁸⁸ Williams R. (2023). What is the Glass Ceiling Phenomenon? A look at Barriers that Prevent Women Reaching their Career Potential.

⁸⁹ Interview responses – Female Musician

⁹⁰ Interview responses – Female Publisher

⁹¹ United Nations Girls Education Initiative. (2023). Social Norms and Girls Education in Sierra Leone: Insights and Recommendations Report. https://www.ungei.org/sites/default/files/2023-06/GCI%20social%20norms_Sierra%20Leone_full%20report.pdf

⁹² Interview response – Ministry of Gender and Children Affairs

Leone's creative industry largely because legal recourse is inaccessible for many of them who are in the informal sector. Some women artists and filmmakers have had their work sold and reproduced without any financial rewards, thus depriving them of their well-deserved income. The same applies to artists and fashion and fabric designers. This is well captured by Chikezie and Kumar (2022)⁹³, who write:

"The industry seems replete with unethical theft of intellectual property and presentation of designs as originals when they are anything but. At the individual level, theft of intellectual property serves as a disincentive for creative entrepreneurs to organize ventures to exploit their creative talents."

The absence of an IP framework has also exposed women to exploitation by more established individuals or firms who pay them much lesser than their work deserves, a reflection of gender based financial inequities in the sector.

Unfortunately, Sierra Leone is not included in monetization on platforms such as YouTube, Facebook and TikTok, and this limits online earnings for creatives⁹⁴. Women are already burdened by systemic financial inequalities including infrastructure, limited high value networks and funding, thus the lack of monetization leaves many women creatives with no choice but to restrict creative work to side hustles rather than full time professional work. Monetization also requires stable internet access and secure online payment that most women creatives are not exposed to because of their relatively lower economic status. This lack of monetization in Sierra Leone's creative industry has resulted in many women creatives pursuing other viable careers, thus limiting the time they invest on growing their professional creative work. Women are left with no option but to rely on local markets for income generation, which yield them low returns.

Gender Based Violence, Intimidation and Harassment

Gender Based Violence affects women in the entire creative value chain both online and offline⁹⁵. The study found that women in the creative industry, particularly those in freelance creative jobs are exposed to unsafe working conditions, harassment, exploitation and intimidation and this is worsened by the general absence of institutional protection mechanisms. Women creatives such as freelance creatives operate in informal and unregulated environments exposing them to physical abuse and harassment (Perrin et al, 2024⁹⁶; Ariana Diaries, 2024). Many freelance female musicians, designers and filmmakers occupy temporary locations without basic safety standards. Some work in the evening and during the night conducting related activities such as photoshoots, rehearsals or main performances; exposing them to high risk of violence and assault. Even worse, is the fact that the

informal nature of freelance creative work exposes women to sexual harassment as they face inappropriate sexual advances from their colleagues, employers, clients and audiences⁹⁷.

Economic exploitation is a major risk affecting women disproportionately in the creative industry. Some women creatives in Sierra Leone have reported being trafficked or coerced into working long hours without compensation or being underpaid under the guise of networking opportunities or exposure. As a result of the power dynamics in some industries, which is amplified by male dominance, many cases have remained unreported because of the fear of backlash or retaliation⁹⁸. Added to this, is the fact that the work of some women creatives has been overlooked or dismissed in collaborative networks. Like in many other industries, intimidation tactics pressure women to conform to patriarchal traditional norms and restrict them to supportive roles rather than high profile creative work. In more competitive industries such as fashion and music, women creatives are at the risk of bullying from their dominant male counterparts and their professional reputations usually undermined. This environment tends to be toxic, impacting negatively on women's capacity to thrive and discouraging new talent from aspiring to join the industry. Women's physical wellbeing including mental health, stress and anxiety makes it difficult for them to endure and expose some to drug and substance abuse. National referral mechanisms are barely utilized and relied upon and this is worsened by the lack of prioritization of issues in the creative industry by unions and associations.

Currently Sierra Leone does not have a specific policy or law that addresses intimidation, harassment, sexual abuse and bullying in the creative industry. Many women creatives do not have formal contracts, Terms of Reference or Memorandum of Understanding necessary for legal protection. United Nations Educational, Scientific and Cultural Organization (UNESCO, 2005)⁹⁹ highlights this factor and further notes that;

"As this work is defined by International Labor Organization as non-standard, that is often freelance, part-time, project based, precarious or insecure, rights and policies are not always applied to these

⁹³ Chikezie and Kumar (2022). Sierra Leone Fabrics and Fashion: Prospects and Challenges for the sector. https://media.odi.org/documents/ODI_case_study_Sierra_Leone_fabrics_and_fashion.pdf

⁹⁴ A call for Facebook Monetization in Sierra Leone. https://www.facebook.com/groups/1603452156617975/posts/3521597488136756/?_rd=1

⁹⁵ UNESCO (2023). Artists Condemn Gender Based Violence in the Creative Sector. <https://www.unesco.org/en/articles/artists-condemn-gender-based-violence-creative-sector#:~:text=The%20culture%20and%20creative%20industries%20stakeholder%20that,women%20and%20men%20in%20the%20creative%20environment>

⁹⁶ Perrin, N et al. (2024). Breaking the Cycle: Ending Gender Based Violence and Empowering Women in Sierra Leone. <https://blogs.worldbank.org/en/african/breaking-cycle-ending-gender-based-violence-and-empowering-women-sierra-leone#:~:text=The%20most%20reported%20forms%20of,than%20their%20non%20disabled%20counterparts>

⁹⁷ Interview – Female Journalist and Socialite

⁹⁸ Communication Initiative. (2025). Threats Against Public Facing Women in Sierra Leone. <https://globalcommunit.com/content/threats-against-public-facing-women-sierra-leone>

⁹⁹ UNESCO (2005). Gender Creativity: Progress on the Precipice. <https://www.unesco.org/creativity/sites/default/files/medias/fichiers/2023/01/375706eng.pdf>

occupations, which has a major impact on women creative workers for whom progress on reaching decent work conditions is recognized to be slower than men".

This also means that there is an absence of maternity leave and flexible working hours that are legalized in formal employment. There are multiple barriers that inhibit women from reporting sexual exploitation, intimidations, harassment and abuse ranging from fear of being blamed, to inaction by authorities and lack of confidentiality. Most associations and unions in the creative economy, including those advocating for the protection of women, do not have gender specific policies, grievance redress mechanisms and anti-sexual harassment guidelines that union workers can utilize to prevent and respond to harassment, intimidation and bullying¹⁰⁰.

Economic Barriers

Economic barriers and infrastructure challenges in Sierra Leone's creative economy disproportionately affect women. A major barrier that many women face is associated with high rental costs which makes it difficult for women to have access to studios and venues¹⁰¹. There are virtually no film incubators in Sierra Leone, which can finance creative industries. In addition, many women creatives do not have formal performance spaces and do not own technical equipment in their own right. With many relying on shared or informal spaces, their capacity for large scale projects is severely limited. Conversations with creatives revealed that export costs including high courier fees, expensive imported raw materials and taxation present severe barriers to women creatives who desire to reach global markets. DHL, and EHS are the major commercial courier services mentioned by creatives engaged during the study which are generally considered expensive. The increasing cost of importing fabrics, accessories, equipment and raw materials resulting from the ever-increasing exchange rates, disproportionately affects women especially the majority small scale women creative enterprises. According to Chikezie and Kumar (2022), though there are opportunities presented by the mushrooming of a new crop of fashion designers in Sierra Leone, the businesses operate in a challenging environment, facing high production and finance costs, skills staff shortages and numerous supply chain challenges¹⁰². Several women creatives in the design industry, reported a drop in demand resulting from the flooding in of cheaper imports especially from China. Women creatives in Sierra Leone also struggle to access credit, loans and financial support and this limits their capacity to grow (Ariana Diaries, 2024). According to UNDP (2018), many women do not have bank accounts with financial institutions, and this results in 'economic exclusion as they do not have access to credit beyond

informal money lenders and personal networks'¹⁰³. This is worsened by the fact that they are not well exposed to potential investors and thus cannot access resources to invest in their growth. Many women creatives are not well exposed to opportunities to go beyond their local stages to national, regional and international platforms thus reducing their potential to earn sustainable incomes from their creative work.

Spotlight on Initiatives Supporting Gender Inclusion in Sierra Leone's Creative Economy

Despite the continued gender related constraints in Sierra Leone's creative economy, various interventions by organizations such as Creative Hub Africa (CHA), Salone Film Union (SAFU), Fashion Design and Textiles Association (FDTA), PEN Sierra Leone, Ministry of Youth Affairs and Ministry of Tourism and Cultural Affairs demonstrate potential for transformative change. These organizations have been investing in promoting women creatives through capacity development, access to markets, infrastructure development and sensitization. Not only does these efforts pave the way for an inclusive creative economy by promoting gender equity, but they also drive cultural preservation and Sierra Leone's economy.

Creative Hub Africa

Engagements with Sierra Leonean women in the creative industry revealed that, while the journey is particularly challenging for women who are aspiring to carve a niche in the industry, there are also immense opportunities to redefine boundaries. The experience of prominent artists like Isatu Harrison, CEO and founder of Creative Hub demonstrates resilience and commitment to innovation. After spending two decades in United Kingdom, she launched a fashion brand in London and established a factory in Sierra Leone, merging her entrepreneurial vision with a focus on social impact. Isatu recognized the dedication of young women and young women in Sierra Leone and introduced practical mentorship and training to empower emerging businesses culminating in the launch of Creative Hub Africa (CHA) in 2022.

CHA exemplifies an inclusive and survivor centered approach to development through various approaches. CHA organizes and facilitates capacity development

¹⁰⁰ Interview – Female filmmaker

¹⁰¹ Cherie Blair Foundation for Women (2014). National Study on Women's Access to Financing in Sierra Leone. <https://cherieblairfoundation.org/wp-content/uploads/2021/11/National-Study-on-Womens-Access-to-Financing-in-Sierra-Leone.pdf>

¹⁰² Chikezie E.C and Kumar C (2022). Sierra Leone Fabrics and Fashion: Prospects and Challenges for the Sector. https://media.odi.org/documents/ODI_case_study_Sierra_Leone_fabrics_and_fashion.pdf

¹⁰³ United Nations Development Programme - UNDP (2023). Barriers and Enablers of Women Participation in Revenue Generation in Sierra Leone. <https://www.undp.org/sites/g/files/zskgke326/files/2023-02/Barriers-and-Enablers-of-Women%E2%80%99s-Participation-in-Revenue-Generation-in-SierraLeone-2023.pdf>

initiatives through training and mentorship for women across various disciplines including culinary arts and fashion. This has provided women with the requisite technical expertise and skills to develop their crafts and build sustainable businesses, including in industries dominated by men. Additionally, CHA also provides digital literacy training, in recognition of the growing importance of technology in the creative industry. This has enhanced women's ability to sell their products online, thus addressing the digital divide and equipping women with tools to expand their visibility beyond their communities. CHA has also been hosting and facilitating guest sessions with industry leaders who provide invaluable inspiration to upcoming creatives. These sessions emphasize gender inclusive practices and priorities inspiring women and other vulnerable groups to pursue their passions in a structured and supportive environment. CHA also organizes monthly pop-up markets to give women creatives a platform to showcase their work. This includes the popular cash-less Christmas Market. This initiative has promoted visibility while also enhancing financial independence and collaboration among female creatives. Another significant contribution of CHA in the creative industry relates to its membership model which allows access to shared spaces, equipment and tools for women creatives at a minimal cost. As a result, this eases the financial burden of infrastructure on women and allows them to concentrate on their creative work.

Ministry of Youth Affairs

The Ministry of Youth Affairs' role within the creative industry has been significant, particularly with regards to policy formulation and youth engagement. The Ministry collaborates with various organizations such as CHA, Salone Film Union (SAFU), donor organizations and international organizations (e.g. UNESCO, KOICA) to provide opportunities for young people including vulnerable young women, youth with disabilities and youth at risk to access training, mentorship and financial resources. In these partnerships, the Ministry has focused on skills development and entrepreneurship development; thus, many young women have transitioned their informal creative work to formal businesses. Additionally, the Ministry has been advocating for safe spaces for women to freely engage in the creative industry including addressing safety concerns and cultural barriers that often limit women's participation in the creative industry. There are ongoing engagements between government and the creatives on the development of policies and legal frameworks that promote equal opportunities in the industry. It is anticipated that; these policies will enhance gender equality by reducing gender disparities and creating a supportive environment for women entrepreneurs. The Ministry of Youth Affairs is also implementing a cross-sector collaboration project titled "Ready Salone" which is geared towards enhancing digital skills and entrepreneurship for young women and persons with

disabilities expected to benefit thousands of young women including those with disabilities through skills development.

Salone Film Union (SAFU)

The recently established Sierra Leone Union is advocating for greater inclusion in the film industry. SAFU is specifically lobbying for the adoption of the National Film Policy, focusing on intellectual property, infrastructure development and production support. SAFU has engaged extensively with relevant Ministries, Departments and Agencies (MDAs), donors and UN Agencies to advocate for the provision of capacity development opportunities including formal filmmaking education. Additionally, SAFU has also made strides in representing professionals in the film industry in Sierra Leone with the aim of creating an inclusive umbrella body that enhances collaboration among the creatives.

Fashion, Design and Textiles Association (FDTA)

The Fashion, Design and Textile Association (FDTA) employs three key strategies to address gender issues in the fashion industry. Firstly, FDFTA conducts trainings, facilitates symposiums and master classes to enhance technical and entrepreneurial skills among their women members. Secondly, FDFTA enhances market access for women creatives by collaborating regionally with other West African countries especially Nigeria and Ghana to expand women's visibility and sales. Thirdly, FDFTA encourages women creatives to enhance professionalism by registering their businesses, recruit staff, put in place business systems and policies that position them to access resources. FDFTA also conducts fashion weeks aimed at showcasing talent, linking women creatives to various stakeholders and markets, and building public awareness of the creative industry.

PEN Sierra Leone

PEN International in Sierra Leone is actively promoting women empowerment through various strategies, including the following:

Through school literacy clubs PEN Sierra Leone has been promoting reading and writing skills development among girls, thus preparing them for professional development in creative expression.

PEN Sierra Leone has also been conducting advocacy and sensitization activities encouraging girl child education and also particularly mobilizing girls for participation in creative disciplines. As a result, PEN Sierra Leone has significantly contributed to mobilization efforts to combat societal restrictions on potential future creatives.

PEN Sierra Leone's collaboration and partnership with various key stakeholders, institutions and groups enables cross cultural exchanges that have enhanced broader visibility for women's contributions in the creative industry.

Community Associations & Community Based Organizations

The study found evidence of collaboration between Community Based Organizations (CBOs), state institutions including Ministry of Gender and Children Affairs; Ministry of Youth Affairs and unions and associations focused on promoting women's participation in the creative industry through trainings, exhibitions, competitions and performances. Such interventions are fostering collaboration and amplifying the voices of women in the creative industry. In general, the contributions of Sierra Leone's CBOs towards the promotion of women creatives are categorized into three:

Capacity Building: Organizations such as Art Collectives host workshops and provide practical training in design and crafts thus inspiring women and marginalized groups. These interventions have not only encouraged individual capacities, but they have also fostered a supportive ecosystem, a culture of peer learning and collaboration among women creatives. The Balanta Academy of Music and Performing Arts is an example of successful interventions by grassroots organizations towards marginalized creatives through scholarships and low-cost training programs.

Access to Resources: A significant contribution by CBOs towards women creatives lies in bridging the resource gap. This includes market shows and exhibitions organized to showcase the work of women and providing them with a platform to sell their work, promoting financial independence and visibility.

Policy Advocacy: CBOs have also been advocating for a conducive legal framework for the protection and women's rights and gender inclusive practices. The advocacy and sensitization efforts by CBOs has particularly been significant in shifting perceptions and attitudes for the broader acceptance of women creatives.

Ministry of Tourism and Cultural Affairs

The Ministry of Tourism and Cultural Affairs (MoTCA) has implemented various initiatives that demonstrate a strong commitment towards gender equality in the creative industry. The Ministry collaborates with the private sector to provide training opportunities and infrastructure for women creatives through the creative village. MoTCA also brings together fashion houses by creating collaboration platforms that enhance gender inclusivity and professionalism.

MoTCA's led "Tourism for All Campaign" successfully mobilized communities leading to the identification of talent including nurturing women creatives. Another initiative that stands out in inspiring women creatives is the Creativity and Innovation Month.

Exploring Opportunities for Creating Safe and Inclusive Creation Hubs

This section explores opportunities for creating safe hubs, drawing from fieldwork, research and good practice. The establishment of safe and inclusive creation hubs in Sierra Leone is crucial given the systemic barriers, economic and socio-cultural barriers faced by marginalized groups including women and persons with disabilities. Creatives hubs could provide more centralized spaces for innovation and networking crucial for marginalized groups to thrive.

Infrastructure Provision

Well planned infrastructure that caters for diversity in the creative industry is crucial for safety and inclusivity. This can be done through the establishment of shared safe spaces that are accessible to women and people with disabilities (PWDs) and are well equipped with the necessary tools and machinery such as audio equipment, machines, studios and postproduction facilities. FDTA particularly emphasized this for the benefit of fashion designers. Inclusive and safe infrastructure can also be made possible with the establishment of multipurpose venues that integrate key requirement of different creative industries such as studios, exhibition areas, performance rooms that caters for music, visual, theatre and arts industries. An example is the transformation of Old Fourah Bay College into a cultural center that features gallery, music studio, cultural center and performance auditorium.

Policies and Laws

A conducive policy and legal framework is crucial for the creation of safe and inclusive hubs in Sierra Leone. The development and enforcement of a strong Intellectual Property framework can go a long way in safeguarding creatives work, preventing vulnerabilities associated with intimidation, harassment, bullying, sexual abuse and piracy. Several organizations, associations and unions in Sierra Leone have been advocating for the enforcement of IP rights. Connected to this, is the need to institute safety guidelines and protocols including anti-harassment policies, grievance redress mechanisms, codes of conduct, diversity protocols and safeguarding standards that guarantee safety for all creatives; while ensuring that measures are taken to prevent and respond to abuse.

Capacity Building

Capacity building interventions are also important in enhancing safety and inclusivity. Formal mentorship, training and apprenticeship is crucial in enhancing entrepreneurial skills, leadership development and technical advancement especially among the marginalized creatives. Organizations such as CHA have embraced this and are offering trainings and capacity development in various industries including visual arts and fashion that benefit women. These can be expanded to also consider male dominated industries. Additionally, interventions that empower marginalized groups with digital skills necessary for them to market their products and have access to monetization platforms are also crucial and can bridge the technology gap. In 2021, the British Council in Sierra Leone launched the Audio-Visual Storytelling Lab, a remarkable example of empowering women in the creative industry. The lab, delivered in collaboration with Freetown Media Centre (Sierra Leone) and Nova Studios (UK) featured skills enhancement for short form documentary and film production, incorporated peer led activities and hands on exercises, and helped upcoming artists to improve audiovisual and storytelling capacities under the guidance of experts (British Council, 2021).

Financial Empowerment

Interventions that promote accessibility to finances are also key for the creation of safe and inclusive hubs. Membership models that mobilize nominal fees for creatives to access creative hub facilities instill a sense of ownership and contribute towards the upkeep of the hubs. CHA exemplifies the success of this model. Sponsorships and partnerships mobilized through engagements with the private sector, donor organizations and NGOs can also pool funds for the establishment and maintenance of inclusive hubs. An example of a successful partnership in this regard is the collaboration between the United States Embassy and World Monuments that funded the cultural transformation of Old Fourah Bay College to a sustainable hub.

Community Engagement

Creative hubs that integrate community engagement foster safety and inclusivity. This can be done through public education, sensitization and outreach activities employing strategies like workshops, outdoor events, and festivals that promote inclusivity. An example is the CHA monthly pop-up markets that have provided creatives including women, people with disabilities and other marginalized groups with platforms to showcase their work. Another example is the "Tourism for All Campaign" that is being implemented by the Government of Sierra Leone, which has encouraged

women creatives, mobilizing communities against negative socio-cultural barriers that limit creatives.

Other Approaches for Creating Safe and Inclusive Hubs

Research findings revealed the following as good approaches to creating safe and inclusive hubs:

- I. Regional and International Integration:** The participation of creatives in international platforms can connect local creatives including those marginalized, to international audiences and visibility opportunities. An example is the Gnaoua World Festival spearheaded by Telecom that is providing a viable opportunity for local creatives to connect internationally.
- II. Institutional Frameworks:** Institutional frameworks are critical in promoting safety and inclusivity because they provide the necessary regulatory and policy environment for diverse creative activities including for vulnerable groups such as women and PWDs. Integrating inclusivity and safety into national policies and regulations provides a backbone to address systemic barriers such as gender disparities, infrastructure deficits and intellectual property issues. The MoTCA's thrust towards merging the Cultural and Creative Industries Policy presents an opportunity for streamlining and creating legal frameworks that protect the creatives' rights while setting up licensing protocols and providing mechanisms for centralized funds like the National Film Fund.
- III. Collaboration:** Cross sector collaborations in the creative industry have proved to be unifying and necessary in bring together fragmented sectors and individual creatives for inclusivity and expansion.
- IV. Geographical Clustering:** Additionally, opportunities for growth and specialization were also found in geographical clustering fosters specialization. For example, Bo is well known for craft production while Makeni has made strides through its textile tradition. These are local platforms that women are leveraging to showcase their talents, interact with their peers, share knowledge and access relevant resources.

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