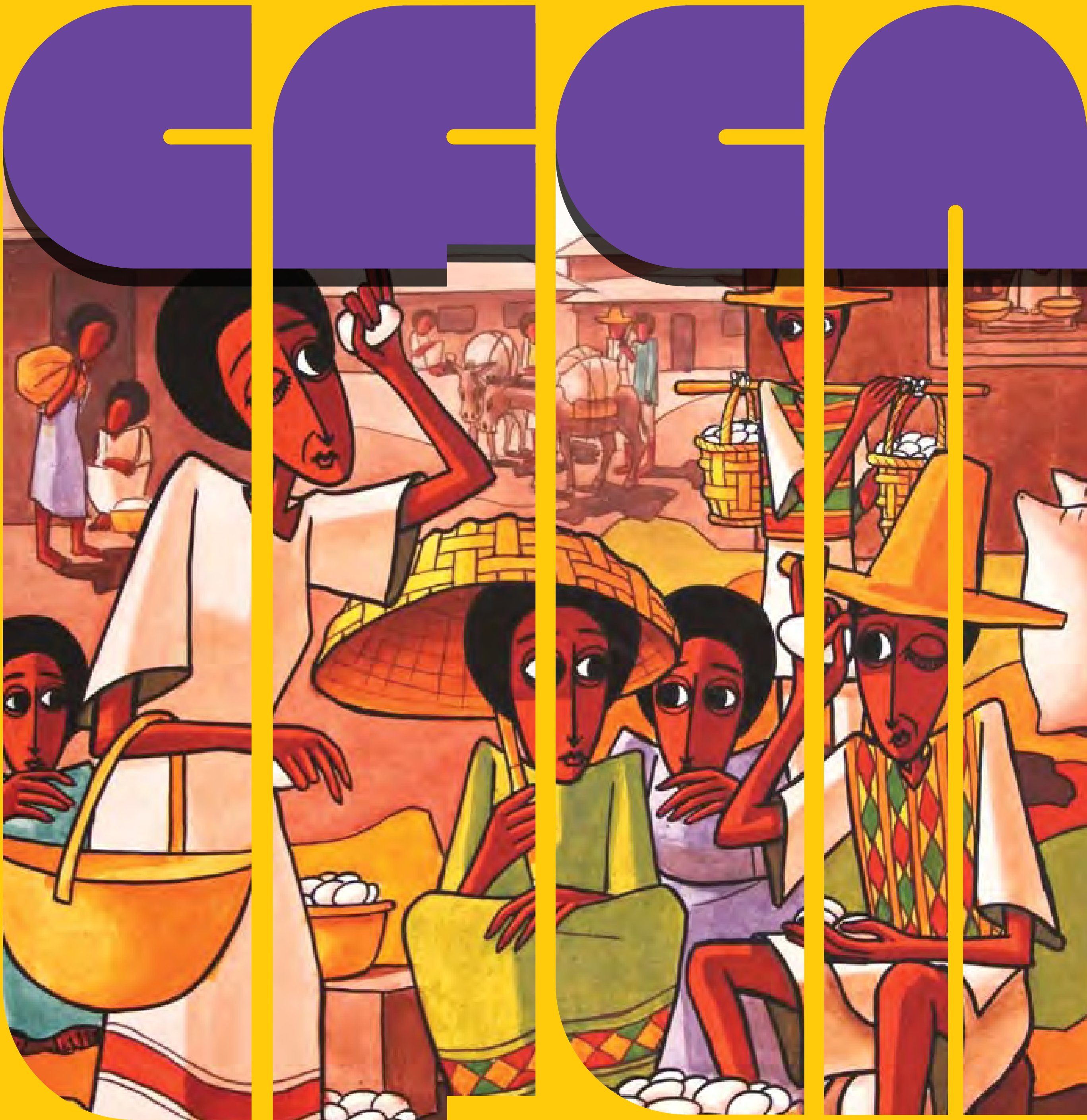
The Economic Contribution of the Cultural and Creative Industries (CCIs) to Gross Domestic Product (GDP), Employment, and Informal Sector Dynamics in Ethiopia – CfCA Study Report



CONNECT FOR CULTURE AFRICA

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ACRONYMS AND ABBREVIATIONS

CCIs	Cultural and Creative Industries
DCMS	Department for Culture, Media and Sport
EIPA	Ethiopian Intellectual Property Authority
ETB	Ethiopian Birr
GDP	Gross Domestic Product
GVA	Gross Value Added
ILO	International Labour Organization
IPR	Intellectual Property Rights
MSMEs	Micro, Small and Medium Enterprises
MoCS	Ministry of Culture and Sports
MoCT	Ministry of Culture and Tourism
OECD	Organization for Economic Co-operation and Development
UNCTAD	United Nations Conference on Trade and Development
UNIDO	United Nations Industrial Development Organization
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
WIPO	World Intellectual Property Organization
WIPO	World Intellectual Property Organization

EXECUTIVE SUMMARY

Ethiopia's Cultural and Creative Industries (CCIs)—including music, film, performing arts, fashion, publishing, design, crafts, heritage-based services, and emerging digital content—are increasingly recognized as strategic sectors with strong potential to contribute to economic transformation, job creation, innovation, and social inclusion. Globally, evidence shows that CCIs can generate substantial value added and employment, particularly for youth and women. In Ethiopia, however, the sector remains under-measured and under-prioritized in formal economic planning due to fragmented classification systems, weak administrative recording, and the predominance of informal activity.

To address this evidence gap, Selam Ethiopia under the Connect for Culture Africa (CfCA) initiative commissioned this study titled: "Study on the Economic Contribution of the Cultural and Creative Industries (CCIs) to GDP, Employment, and Informal Sector Dynamics in Ethiopia." The study provides the first comprehensive, evidence-based assessment of Ethiopia's CCI economy by triangulating secondary administrative records, global benchmarks, and local proxy estimates, supported by targeted primary data collection and qualitative consultations.

Study Purpose and Approach

The study aimed to quantify and describe the contribution of CCIs to Ethiopia's economy, focusing on: (i) GDP and value-added contribution, (ii) employment contribution and labor market dynamics, (iii) informal sector characteristics, and (iv) enabling factors and constraints affecting sector growth. A convergent mixed-methods design was applied. Quantitative analysis relied heavily on compiled secondary administrative data (especially from Addis Ababa City Administration Culture and Tourism Bureau), supplemented by primary surveys including enterprise profiling (55 enterprises) and an employee survey (242 workers). Qualitative evidence was generated through key informant interviews with officials and experts (17) and focus group discussions with employees (58).

Key Findings

CCIs are a major but "invisible" contributor to the economy

Using the most structured available proxy estimate (WIPO copyright-based industries), CCIs contribute an estimated more than 4.73% of GDP, indicating that the sector is a major pillar of the service economy. Despite this scale, the sector remains largely invisible in official national accounts due to weak classification and incomplete integration into national statistical systems. The study further documented ETB 1.33 billion in current capital among a subset of Addis Ababa-based CCI enterprises with recorded capital data, confirming that parts of the sector are increasingly capital-intensive and commercially significant.

The creative economy shows strong geographic concentration, shaped by administrative visibility

The compiled dataset documented 9,702 CCI enterprises and 70,792 CCI workers, with Addis Ababa accounting for 92% of documented institutions and 84.8% of documented employment. This concentration reflects Addis Ababa's role as the country's formal economic hub, but also reveals a significant institutional visibility gap: regional creative activity is likely undercounted rather than absent. In the heritage domain, regional employment is especially prominent, with the Amhara region accounting for over half of recorded Cultural and Natural Heritage employment—demonstrating that regional creative economies are strongly anchored in localized cultural assets.

Informality is structural and highly sector-specific

The study confirms that informality is not marginal—it is a defining feature of Ethiopia's creative economy. In Addis Ababa, the overall formalization rate (licensed institutions) is 72.6%, but this masks sharp sectoral differences. Design and Creative Services is highly formalized (89.2% licensed), while Performance and Celebration—the largest employment domain—is largely informal, with only 24% licensed (meaning roughly three-quarters are unlicensed). This pattern shows that the most culturally vibrant and labor-intensive parts of the sector remain excluded from formal credit systems, social protection, and structured government support.

Audio-visual and interactive media is the strongest growth engine

Across capital and profitability indicators, Audio-visual and Interactive Media emerges as the most dynamic domain. It accounts for over 61% of recorded current capital in the Addis Ababa subset and shows the strongest profit growth trend in the recorded series. This confirms that digitalization and screen-based content production are key frontiers for youth-led innovation and high-productivity creative enterprise growth, even though intellectual property enforcement and monetization systems remain weak.

Employment is substantial, but job quality is uneven

Primary employee survey findings show that CCIs provide meaningful employment opportunities but with mixed job quality. Among surveyed employees (N = 242), most reported permanent employment (83.5%), yet only 52.5% reported having a written contract. Training access is limited: only 20.7% of employees received any training in the last three years, and training is heavily concentrated in creative/artistic skills rather than business development, marketing, or financial literacy. Income satisfaction is generally low: 59.1% of employees reported dissatisfaction with income (dissatisfied or very dissatisfied), although most still expressed intention to continue working in the sector, reflecting strong professional commitment and/or limited alternative livelihood options.

The main constraint is institutional—not technical

A central conclusion of the study is that Ethiopia's inability to measure CCIs accurately is primarily due to institutional fragmentation and weak routine data systems rather than lack of creative activity. Without harmonized categorization, coding, and standardized datasets, CCIs remain scattered across broad administrative labels such as "trade" or "services," preventing accurate estimation of value-added, employment, and informal sector dynamics. Encouragingly, the study documents progress at multiple levels, including the Addis Ababa directive-based classification system and growing federal recognition of the importance of CCI data collection. Academic contributions such as Dr. Bayleyegn's framework [1] identifying approximately 179 subdomain categories further demonstrate that detailed classification is feasible and critical for national measurement and valuation.

Conclusions

Overall, the study concludes that Ethiopia's CCIs represent a strategic economic frontier: they are labor-intensive, youth-driven, increasingly capitalized, and strongly linked to innovation and service-sector growth. Yet the sector remains constrained by weak institutional coordination, limited financing, inadequate infrastructure, poor market access systems, weak intellectual property enforcement, and fragmented data ecosystems. Without systematic classification and measurement reforms, Ethiopia will continue to underestimate the sector's true contribution and underinvest in one of its most inclusive economic growth pathways.

Priority Recommendations

To unlock the full economic potential of Ethiopia's CCIs, the study recommends to:

1. Harmonize national CCI mapping and classification systems led by the Ministry of Culture and Sport in collaboration with relevant institutions, aligned with international standards such as the UNESCO Framework for Cultural Statistics (2009).
2. Establish a National Cultural Satellite Account (CSA) through the Ethiopian Statistics Service to institutionalize measurement of CCI contribution to GDP and employment.
3. Scale the Addis Ababa CCI data initiative nationally, using it as a blueprint for regional registries and improved administrative visibility.
4. Institutionalize a national CCI data and statistics program to routinely track enterprises, employment, revenues, and costs disaggregated by subsector, region, gender, and age.

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1. Bayleyegn Tasew. "A Classification Framework for Cultural Industries in Ethiopia." In: ZENA – LISSAN, Journal of Academy of Ethiopian Languages and Cultures, Vol. XXVII, No 1 (December 2018), Pp 17-58

5. Strengthen market access and distribution systems, including digital distribution models and export readiness pathways.

6. Improve job quality and workforce development, including expanded training in entrepreneurship, marketing, digital skills, and financial literacy.

7. Strengthen intellectual property enforcement and financing access, including financial products that recognize creative assets and digital/IP value as collateral.

By addressing these constraints and institutionalizing evidence-based planning, Ethiopia can reposition CCIs from an under-recorded cultural space into a recognized and investable economic sector capable of generating inclusive growth, decent jobs, innovation spillovers, and increased national competitiveness.

1. INTRODUCTION

Ethiopia's Cultural and Creative Industries (CCIs)—including music, film, performing arts, fashion, publishing, design, and emerging digital content—are increasingly recognized as dynamic sectors with the potential to contribute significantly to national economic transformation. Across many countries, the CCIs have demonstrated strong capacity for employment generation, entrepreneurship, innovation spillovers, and social inclusion, particularly for youth and women. In Ethiopia, the sector is characterized by both vibrant creativity and structural constraints, including fragmentation, limited investment, weak institutional management, and the predominance of informal economic activity.

Despite visible growth in creative production and demand for cultural goods and services, the economic contribution of the CCIs to Ethiopia's gross domestic product (GDP), employment, and broader development objectives remains insufficiently quantified. This evidence gap limits the ability of government, civil society, and development partners to allocate resources strategically, design supportive regulatory frameworks, and implement targeted investments in the creative economy.

In this context, Selam Ethiopia—under the Connect for Culture Africa (CfCA) initiative—has commissioned a national study titled: "Study on the Economic Contribution of the Cultural and Creative Industries (CCIs) to GDP, Employment, and Informal Sector Dynamics in Ethiopia." The study is intended to generate rigorous, policy-relevant evidence that captures both the formal and informal dimensions of the CCIs and supports advocacy for increased public and private investment. The research design emphasizes inclusivity, the integration of community-based knowledge, and methods that can illuminate "hidden" economic activity and underrepresented voices in the cultural space.

1.1. Background and Rationale

In recent decades, the CCIs have gained prominence as a strategic sector with demonstrable contributions to economic transformation, employment creation, innovation, and social development. Across advanced economies—and increasingly in emerging markets—the CCIs are recognized as engines of value creation that operate through integrated systems of production, distribution, and consumption, while also generating non-monetary public value such as cultural identity, social cohesion, and civic participation ((UNESCO, 2009) ; (UNESCO, 2022)). Globally, available estimates indicate that the sector's economic footprint is substantial. For example, a widely cited global mapping of the CCIs estimated total revenues of approximately US$2.25 trillion and 29.5 million jobs, underscoring the sector's role as a major source of livelihood worldwide (CISAC, 2015). Broader measurement approaches; depending on the definition and scope applied—often place the CCIs at around 3% of global GDP, with higher shares observed in some national economies where creative services, media, design, and cultural production are more established and better captured in national statistics ((UNESCO, 2022); (UNCTAD, 2024)).

In addition to domestic value creation, the CCIs participate in international trade in both cultural goods and services. Evidence suggests that global trade in creative goods and services reached hundreds of billions of US dollars, with a large share historically concentrated in developed economies due to stronger creative value chains, more advanced intellectual property systems, and greater market access infrastructure (UNDP & UNESCO, 2013). However, international comparisons also emphasize a persistent measurement problem: in many countries, the CCI sector remain underestimated in GDP and labor statistics because creative work is dispersed across multiple industries, partially informal, and often poorly represented in conventional industrial and occupational classifications ((UNESCO, 2009); (UNESCO, 2022)).

Within Africa, the development relevance of the CCIs is frequently discussed in terms of the continent's rich cultural resources, the expansion of youth-driven entrepreneurship, and the potential of creative markets to absorb labor—particularly where formal employment opportunities are limited. While many African countries have introduced policy commitments intended to modernize their respective cultural sectors and stimulate creative enterprise, implementations are often constrained by limited financing, gaps in skills and infrastructure, weak market systems, and insufficient intellectual property enforcement, all of which reduce productivity and inhibit formalization of creative work ((OECD, 2022); (UNESCO, 2022)).

Ethiopia is particularly well-positioned in cultural resources, given its extensive cultural diversity and long-standing traditions of cultural productions and creative expressions. At the same time, the country has not consistently translated this comparative advantage into robust economic outputs, scalable enterprise growth, or reliable measurement of creative-sector value added and employment. Recent national planning and policy frameworks have nonetheless signaled stronger ambition to harness culture and tourism for development outcomes, including job creation, income generation, and foreign exchange earnings. For instance, Ethiopia's national development strategy under the Second Growth and Transformation Plan (GTP II) explicitly frames culture and tourism as priority areas for employment creation and income growth, with stated targets to increase the sector's economic contribution and improve the recognition and promotion of heritage assets (National Planning Commission, 2016). In parallel, Ethiopia's National Cultural Policy emphasizes strengthening cultural institutions and addressing regulatory and financing gaps as part of developing cultural and creative sectors (UNESCO, 2017).

Despite these policy aspirations, the sector continues to face structural and management challenges. These include limited availability of disaggregated economic and labor market statistics for the CCIs, incomplete coverage of informal creative activity, and inconsistent classification of creative occupations and enterprises conditions that reduce the visibility of CCIs in decision-making and constrain evidence-based investment and policy prioritization ((UNESCO, 2009); (UNESCO, 2022)). Addressing these gaps requires credible, context-sensitive evidence capable of estimating the CCIs' direct and indirect contributions and clarifying the constraints that limit sector growth and inclusion.

The CCIs constitute an important frontier for inclusive economic development. Globally, the CCIs are increasingly positioned as strategic contributors to GDP, employment reduction, innovation systems, and export growth. As evidently indicated in the 2024 United Nations Conference on Trade and Development's (UNCTAD) Creative Economy Outlook, in countries where data are available, the creative economy contributes between 0.5% and 7.3% of GDP and employs between 0.5% and 12.5% of the workforce, highlighting the sector's growing economic relevance and its role in employment creation (UNCTAD, 2024). In international trade, creative services are expanding rapidly: UNCTAD reports that creative services exports increased by 29% to USD 1.4 trillion in 2022, while creative goods exports increased by 19% to USD 713 billion reinforcing the sector's significance within global trade and value chains (UNCTAD, 2024). Beyond measurable economic outputs, the CCIs also generate substantial non-monetary value by strengthening cultural identity, social cohesion, and civic participation, which contribute to broader development and social outcomes (Ibid).

In Ethiopia, the CCIs have long been a significant part of social and cultural life, and in recent years have expanded in urban centers and regional hubs through entertainment industries, creative entrepreneurship, event-based economies, digital content creation, and the growth of creative services. However, existing evidence on the sector's economic contribution remains fragmented and often anecdotal, and the CCIs are poorly captured in national accounting systems and labor statistics due to definitional limitations, the predominance of informal activity, and the cross-cutting nature of creative work (British Council, 2021). At the same time, the sector is constrained by systemic barriers, including limited financing options, inadequate infrastructure and production spaces, weak intellectual property protection and enforcement, skills gaps, and insufficient legal support—constraints that reduce productivity, income generation, and the transition of informal creative activity into sustainable enterprises (British Council, 2021). The Connect for Culture Africa (CfCA) initiative aims to strengthen networks and advocacy for increased investment in culture and creative sectors across Africa. To effectively influence national budgeting and policy processes, there is a pressing need for credible empirical evidence demonstrating CCIs' direct and indirect contributions to the economy—especially in terms of value added, employment, multiplier effects, and the potential of informal creative activity (UNCTAD, 2024). This study thus responds to that need by developing robust economic estimates and contextual analysis to inform government, stakeholders, and advocacy platforms.

1.2. Purpose of the Study

The purpose of this study is to generate a comprehensive and evidence-based assessment of the economic contribution of Ethiopia's Cultural and Creative Industries to national development outcomes, with a specific emphasis on:

- Contribution to GDP and value added
- Employment generation and labor market dynamics, including age and gender disaggregation
- Informal sector dynamics and hidden economic activity
- Multiplier effects and linkages with other economic sectors
- Constraints and enabling factors affecting growth and competitiveness

The study is designed to support national and regional policy issues and advocacy aimed at strengthening investment in the CCIs and positioning culture as a central component of inclusive development.

1.3. Study Objectives

The overall objective of the study is to conduct a rigorous economic valuation of the CCIs in Ethiopia and translate findings into policy-relevant insights for investment and sector development.

Specifically, the study aims to:

1. Quantify the contribution of the CCIs to national economic output, including GDP and value-added measures, using applicable methodologies adapted to the Ethiopian context.
2. Disaggregate employment data within the CCI sectors by key demographic characteristics, particularly age and gender, to assess inclusivity and labor market structure.
3. Assess the multiplier effects of the CCIs on the other sectors and entrepreneurship ecosystems, thereby clarifying macroeconomic relevance beyond direct contributions.
4. Identify systemic constraints and enablers shaping sector growth, including regulatory frameworks, infrastructure, finance, and skills development.
5. Develop actionable policy recommendations to unlock sector potential, support innovation, and enhance equitable access to opportunities and resources.
6. Assess the extent and value of informal creative activity and its contribution to the economy, with a focus on challenges and opportunities specific to informal the CCI sector.

1.4. Scope of the Study

The study was initially designed to have a national scope and to capture the economic significance of Ethiopia's Cultural and Creative Industries (CCIs) across both formal and informal segments. However, during implementation, it became clear that reliable and usable secondary data were largely concentrated in Addis Ababa. Data collection from regional states and cities proved difficult, and many regional institutions had limited systems for collecting, organizing, and making CCI-related data available for analysis. As a result, the empirical analysis is primarily based on data obtained from Addis Ababa, while national-level interpretation is made cautiously and only where the available evidence permits.

Accordingly, the scope of the study includes:

- Addis Ababa-focused economic valuation, with emphasis on estimating the GDP/ value-added contribution and employment generated by selected CCI subsectors using available administrative, institutional, and stakeholder-provided data.

- Indicative national interpretation, where relevant, based on triangulation with available secondary sources, stakeholder consultations, and sector knowledge. However, the study does not claim to provide a fully representative national estimate due to limited regional data availability.
- Subsectoral profiling of key CCI domains, including music, film, fashion, performing arts, publishing, design, and digital creative services, subject to data availability and the use of an operational classification method developed for the study.
- Formal sector assessment, covering registered firms, institutions, enterprises, and formally employed creative workers for which administrative or institutional data could be accessed.
- Informal sector assessment, capturing unregistered enterprises, freelance and gig-based creative work, informal production and distribution channels, and cultural livelihoods that are often not reflected in official statistics.
- Stakeholder-based analysis, integrating perspectives from government institutions, private sector actors, associations, creative entrepreneurs, community actors, and development partners, particularly those with direct knowledge of Addis Ababa's CCI ecosystem.
- Cross-cutting equity analysis, focusing on youth and gender inclusion, barriers to participation, and differences in access to opportunities within the CCI sector.

While the study seeks to generate estimates on the economic contribution of CCIs, the findings should be interpreted in light of important data limitations. In particular, the limited availability of organized regional data, weak administrative records for several subsectors, and the under-documentation of informal creative activity required the use of mixed methods, triangulation, and clearly stated assumptions. Therefore, the study should be understood primarily as an Addis Ababa-based empirical assessment with cautious national-level implications, rather than a fully comprehensive national CCI valuation.

1.5. Key Research Questions

The study seeks to give answers for the following central research questions, aligned with the CfCA ToR (2025):

1. What is the contribution of the CCIs to Ethiopia's GDP and national economic output?
2. How is value added and distributed across the CCI subsectors, and what are the sector's growth patterns and productivity characteristics?
3. What is the size and structure of employment in the CCIs, and how is it distributed by subsector, gender, and age (particularly youth)?
4. What is the scale, nature, and economic significance of informal creative work and informal creative enterprises?
5. What are the multiplier effects of the CCIs on other sectors and on innovation and entrepreneurship ecosystems?
6. What constraints hinder the growth and competitiveness of the CCIs in Ethiopia
7. What enabling factors can accelerate the sector's development?
8. What policy and investment interventions are most likely to increase the CCI contributions to inclusive economic development, employment, and innovation?

1.6. Coverage Limitations and Inference Boundaries

Although the study was initially intended to have a national scope, its analytical boundaries should be clearly recognized. The primary data collected through enterprise, employee, and institutional surveys were mainly intended to support descriptive analysis, structural profiling, and triangulation. They were not designed to produce statistically representative estimates for the entire national CCI population.

In practice, the available data used for the analysis were largely concentrated in Addis Ababa. Collecting comparable data from regional states and cities proved difficult, partly because many regional institutions have limited systems for collecting, organizing, and making CCI-related data available as secondary data sources. As a result, the study provides a stronger empirical basis for Addis Ababa than for other regions.

National-level economic and employment estimates are therefore based mainly on available secondary sources, including administrative records, reviewed literature, institutional datasets, and internationally benchmarked frameworks. Where direct data were incomplete or unavailable, the study relied on triangulation, proxy indicators, and clearly stated assumptions.

Because administrative, licensing, and institutional records are more complete and more accessible in Addis Ababa than in other parts of the country, formal sector coverage remains geographically uneven. Accordingly, national findings should be interpreted as structured approximations based on the best available evidence, rather than as results of a comprehensive nationwide census or a fully representative national survey.

1.7. Report Organization

This report is structured in nine chapters. Chapter 1 outlines the study's rationale, objectives, and scope. Chapter 2 describes the adaptive mixed-methods approach, highlighting the reliance on secondary data for national-level economic and employment estimation, complemented by targeted primary data and stakeholder consultations for descriptive profiling and interpretation.

Chapter 3 provides contextual analysis of Ethiopia's CCI landscape, including policy and institutional dynamics. Chapters 4 to 6 present the core findings: Chapter 4 estimates economic contribution using secondary data and proxy-based synthesis; Chapter 5 analyzes employment patterns and labor market characteristics; and Chapter 6 examines sector linkages and indicative spillover pathways.

Chapters 7 and 8 discuss structural enablers, constraints, and qualitative insights. Chapter 9 concludes with key findings and prioritized recommendations, including strengthening classification systems, data architecture, and national measurement frameworks for the creative economy.

2. APPROACH AND METHODOLOGY

2.1. Overall Study Approach

This study was conducted to generate policy-relevant evidence on the economic and employment contribution of the Cultural and Creative Industries (CCIs) in Ethiopia. A full economic valuation based on internationally recognized frameworks would require comprehensive enterprise-level data collection across all CCI subsectors in order to produce robust estimates of output, value added, and employment.

The Creative Trident and multiplier/linkage approaches were adopted as analytical reference frameworks to structure the interpretation of economic and employment dynamics within Ethiopia's CCIs. However, full implementation of these models requires complete enterprise-level census data across subsectors to estimate embedded, specialized, and support creative employment (Trident decomposition) and to calculate formal inter-industry multiplier coefficients.

Given these data limitations, the study did not undertake a full trident-based econometric estimation or input–output multiplier modeling exercise. Instead, selected elements of these frameworks were applied descriptively. Secondary data synthesis, enterprise profiling, and structured linkage pathway analysis were used to interpret employment structures, sector interdependencies, and indicative spillover channels. These results should therefore be understood as analytically guided interpretations rather than formally estimated trident or multiplier coefficients.

Implementing a full valuation model at national scale would require extensive enterprise coverage, as well as substantial time, financial resources, and logistical capacity. In light of these practical constraints, the study adopted an adaptive and phased approach. Rather than conducting a census-style or large-scale enterprise survey, it relied primarily on secondary data to estimate the economic and employment contribution of CCIs, complemented by targeted primary data collection and stakeholder consultations to strengthen triangulation and contextual interpretation.

The study also undertook a systematic review of existing CCI classification systems, institutional data practices, and emerging initiatives that could serve as entry points for improving CCI measurement in Ethiopia. These findings provide a foundation for future enhancements, including the development and scaling of structured data systems capable of supporting more comprehensive and robust sector valuation in subsequent phases.

2.2. Study Design

The study employed a convergent mixed-methods design, in which quantitative and qualitative components were implemented in parallel and integrated during interpretation. The quantitative component focused on compiling and synthesizing available evidence to estimate the economic and employment contributions of CCIs and to develop structured profiles of CCI activity across subsectors. In parallel, qualitative evidence was gathered to explore the structural and institutional factors affecting data availability, business performance, market access, and policy implementation. This design strengthened triangulation across multiple evidence streams and ensured that quantitative findings were interpreted in light of stakeholder perspectives and contextual realities, thereby supporting more credible and policy-relevant conclusions.

2.2.1. Quantitative Component

The quantitative component supported structured measurement of enterprise characteristics, employment patterns, and economic contribution indicators. Although full enterprise accounting across all CCI subsectors at national level was not feasible, the study applied available data sources and survey-based enterprise profiling to strengthen understanding of sector structure and employment distribution. Where possible, the analysis included disaggregation of employment and enterprise characteristics by key demographic variables, particularly gender and age, to support assessment of inclusivity within the sector.

2.2.2. Qualitative Component

The qualitative component captured institutional perspectives from government officials and CCI experts, as well as business-level perspectives from enterprise owners and cooperative leaders. This component provided essential insight into systemic barriers affecting the sector, including challenges related to data collection systems, coordination across institutions, regulatory and taxation burdens, limited access to finance, infrastructure gaps, and professionalization needs. Qualitative findings also supported validation and interpretation of quantitative results and strengthened the development of practical recommendations for improving CCI measurement and sector support.

2.2.3. Integration of Findings

Integration of quantitative and qualitative findings was undertaken during interpretation and reporting. Quantitative results were compared with qualitative evidence to explain observed patterns, clarify inconsistencies, and strengthen the policy relevance of conclusions. This approach ensured that estimates and descriptive findings were supported by contextual explanations, particularly in areas where data gaps and institutional constraints limit direct measurement of economic and employment contributions.

2.3. Data Sources

The study drew on a combination of secondary and primary data sources to generate evidence on the economic and employment contribution of CCIs in Ethiopia. Secondary data were used to support national-level estimation of economic contribution and employment potential and to contextualize the sector within broader macroeconomic and policy environments. Primary data collection complemented these sources by mapping CCI enterprises, profiling business operations, and capturing employment-related characteristics from workers engaged in the profiled businesses. In addition, institutional inputs were gathered to assess the availability of CCI data, identify challenges affecting data collection and program implementation, and document opportunities for strengthening measurement systems.

2.3.1. Secondary Data Sources

The estimation of economic and employment contributions was primarily based on secondary data drawn from available national and sector sources. These included national macroeconomic indicators relevant to GDP and employment profiling, administrative and institutional records related to CCI licensing, registration, and enterprise classification (where available), sector studies and literature on CCIs in Ethiopia, existing datasets and assessments containing indicators relevant to creative enterprises and labor markets, and relevant government policies, strategies, directives, and legal frameworks. These sources were reviewed and synthesized to generate indicative estimates of sector contribution and to identify key evidence gaps, particularly in relation to informal activity and weakly documented subsectors.

2.3.2. Primary Data Sources

Primary data were collected using three structured survey tools designed to map enterprises, profile businesses, and gather employment information from workers. The primary data strengthened the study's understanding of CCI enterprise characteristics, labor market structure, and operational realities across selected subsectors and locations. In addition, institutional tools and consultations were used to gather perspectives from government officials and CCI experts on sector classification, data systems, coordination mechanisms, and governance challenges, which were essential for interpreting findings and developing practical recommendations.

2.4. Data Gathering Tools

To strengthen the evidence base and support structured sector profiling, the study applied three complementary survey tools. Together, these tools generated consistent information on business presence, enterprise characteristics, and employment conditions within selected CCI subsectors and study locations. The tools were designed to support both descriptive profiling and analysis of employment structure and inclusivity, while also capturing operational challenges affecting enterprise performance and sustainability.

2.4.1. Business Mapping Survey

A business mapping survey was conducted to identify and document CCI enterprises and business units operating within the study areas. This mapping process was conducted with 17 officials and experts from different regional states and city administration and established a structured inventory of creative enterprises and provided an entry point for organizing businesses by subsector and location. The mapped enterprise list also served as the basis for selecting and administering the enterprise profiling survey and for understanding the distribution and visibility of CCI activity within the study context.

2.4.2. Enterprise Profiling Survey

An enterprise profiling survey was administered to owners or managers of mapped businesses to capture key information on enterprise structure and operations. Business profiling was conducted to 55 CCIs. The survey documented the type of activity performed, business characteristics, operational arrangements, market linkages, and major constraints affecting sustainability and growth. The profiling data provided foundational evidence for understanding enterprise dynamics across subsectors and supported interpretation of employment patterns and economic contribution estimates within the limits of available data.

2.4.3. Employee Survey

An employee survey was administered to 242 workers engaged in the profiled enterprises to capture employment-related characteristics relevant to labor market analysis. The survey collected information on job roles, working arrangements, and demographic characteristics, including variables relevant to youth and gender inclusion. This component strengthened the study's ability to assess employment structure within CCIs and supported analysis of inclusivity and workforce composition across subsectors.

2.4.4. Key informant interviews (KIIs)

Key informant interviews (KIIs) were conducted with 17 key informants as an integral part of the business mapping survey, since the mapping tool included open-ended questions that required detailed qualitative inputs from respondents. These KIIs were carried out with selected CCI experts and government officials to generate institutional and technical insights on the structure and classification of CCI subsectors, the availability and quality of administrative data, coordination challenges across institutions, and barriers affecting effective sector measurement and program implementation. The qualitative evidence generated through this integrated KII approach was used to triangulate survey findings, clarify sector dynamics, and strengthen the interpretation of results and recommendations.

2.4.5. Focus Group Discussions (FGDs)

Focus group discussions (FGDs) were conducted to complement the structured employee survey and to generate deeper qualitative insights into employment conditions, workplace challenges, and sector support needs within the CCIs. A total of six (6) FGDs were conducted with 58 employees, all of whom also participated in the employee survey. The FGDs provided an opportunity to validate survey findings, explore shared experiences in greater depth, and capture employee perspectives on key issues affecting job stability, working arrangements, skills development needs, and barriers to income growth. The qualitative evidence generated through the FGDs strengthened triangulation of findings and supported the interpretation of employment-related results across the profiled subsectors.

2.5. Sample Size and Data Collection Procedures

The study gathered primary data from different actors in the CCI sector using the list of enterprises obtained during the enterprise mapping exercise, complemented by additional enterprises reached through a snowball sampling approach. This approach supported identification of relevant respondents and enabled recruitment across subsectors despite the absence of a comprehensive sampling frame for the sector.

As part of the mapping survey, the study reached 17 regional and city administration-level officials and CCI experts, who provided both structured mapping information and qualitative insights through open-ended questions. These inputs were treated as key informant interviews (KIIs) and helped strengthen understanding of enterprise classification practices, data availability, and institutional challenges affecting CCI measurement and sector support.

The enterprise-level surveys covered 55 CCI enterprises through the business mapping and enterprise profiling tools. In addition, an employee survey was administered to 242 workers engaged in the profiled enterprises to capture employment-related characteristics, including job roles, working arrangements, and demographic attributes relevant to youth and gender inclusion.

To complement the employee survey and generate deeper qualitative insights, the study also conducted six (6) focus group discussions (FGDs) with 58 employees, all of whom also participated in the survey. These FGDs helped validate survey findings and provided additional evidence on employment realities, workplace challenges, and priority support needs across subsectors.

Although the study initially anticipated collecting a larger volume of enterprise-level economic and operational data, the final achieved sample was influenced by field realities. In particular, some business owners and enterprise representatives were hesitant to provide detailed business information, which limited the extent of enterprise-level responses that could be collected within the available time and resources. Despite these constraints, the combined use of mapping, profiling, employee survey data, and qualitative evidence supported the study in generating relevant findings and developing policy-relevant, actionable recommendations for strengthening Ethiopia's CCI landscape.

2.6. Data Management and Analysis

Data management and analysis followed a structured framework designed to ensure data integrity, confidentiality, and analytical reproducibility. Quantitative survey data were collected using digital data capture systems with built-in validation rules, logical checks, and skip patterns to reduce entry errors and improve completeness. The data was cleaned through consistency checks, outlier screening, and verification of key variables, including employment counts and enterprise characteristics. Qualitative data were transcribed, translated, and organized systematically to support analysis.

Quantitative analysis began with descriptive statistics to summarize enterprise structures, employment patterns, and market participation. The analysis also generated cross-tabulations and disaggregated results by subsector, gender, and age. Qualitative analysis was conducted using thematic coding, where responses and discussion notes were reviewed and grouped into recurring themes and sub-themes. This process supported systematic interpretation of stakeholder perspectives and enabled the study to identify common patterns across respondents, while also capturing important variations by subsector and respondent group. The thematic analysis was used to interpret constraints and opportunities affecting the sector, including informal sector dynamics, rights enforcement and access to finance, skills gaps, market access limitations, other challenges and enabling conditions for enterprise growth. The integration of quantitative and qualitative findings strengthened both the robustness and explanatory power of the study.

FINDINGS

3. CONTEXT AND OVERVIEW OF CCIS IN ETHIOPIA

This chapter synthesizes evidence from the desk review, ecosystem mapping, and sector studies to describe the baseline conditions shaping Ethiopia's CCIs. The synthesis highlights key structural features of the creative economy, including the prominence of informality, fragmented market systems, underdeveloped monetization and distribution mechanisms, weak intellectual property (IP) enforcement, and limited integration of CCIs into national accounting and labor statistics. These conditions are important for interpreting the subsequent empirical findings on GDP contribution, value added, employment, and other dimensions of CCI performance (British Council, 2021; UNESCO, 2019, 2022; UNCTAD, 2024a; WIPO, 2015).

3.1. Overview of Ethiopia's Creative Economy Landscape

Ethiopia's creative economy is anchored in deep and diverse cultural heritage, including heritage sites, intangible cultural expressions, languages, artistic traditions, and cultural practices that continue to shape cultural production and creative entrepreneurship. These resources contribute to economic activity through crafts, performing arts, cultural events, and cultural tourism, while increasingly serving as inputs into commercial and modern creative industries such as fashion, audiovisual content, music production, and design services (UNESCO, 2017, 2022). Global evidence similarly emphasizes that cultural heritage and creative expression are not only social and identity assets but also economic production systems capable of generating jobs, innovation, and localized development when supported by enabling market structures (UNESCO, 2022).

Ecosystem mapping evidence indicates that Ethiopia's creative economy is strongly concentrated in Addis Ababa, while gradually expanding into regional urban centers through music and event economies, tailoring and fashion enterprises, media production, and emerging digital creative services. Creative work is frequently pursued as both livelihood and enterprise pathway, particularly among youth, and often involves micro-enterprise models and project-based work arrangements (British Council, 2021). This pattern aligns with international evidence that CCIs provide important entry points to self-employment and micro-enterprise development, particularly in contexts where formal labor markets are limited (UNESCO, 2022; UNCTAD, 2024a).

A defining feature of Ethiopia's CCIs is the extent of informality. Much of cultural production and creative employment occurs in informal or semi-formal conditions through unregistered enterprises (e.g., informal craft production, tailoring units), casual labor arrangements (e.g., gigs and freelance work), and unrecorded transactions (e.g., cash-based sales and informal payments). UNESCO's Culture|2030 Indicators framework stresses that cultural employment and output are often undercounted in official statistics due to definitional gaps, informality, and the multi-occupational and intermittent nature of creative work—particularly in developing countries (UNESCO, 2019). This limits the visibility of CCIs in national planning and reduces the ability of policymakers and investors to assess their actual economic and social contribution (UNESCO, 2019, 2022; UNCTAD, 2024a).

The desk review further indicates that Ethiopia's creative economy has strong cross-sectoral linkages and multiplier potential. UNCTAD's global creative economy analysis highlights that CCIs generate multipliers through linkages with tourism, ICT, retail, advertising, education, and services (UNCTAD, 2024a). Evidence from Ethiopia suggests similar linkages exist, particularly through event economies (hospitality and transport), fashion (textiles and retail), and film/media (advertising and ICT). However, weak monetization systems, limited distribution infrastructure, and enforcement challenges constrain value capture, reinvestment, and the scale of spillover effects (British Council, 2021; UNESCO, 2022; UNCTAD, 2024a).

3.2. Policy, Institutional, and Governance Context for CCIs

Ethiopia's policy framework recognizes culture as a national development asset. The National Cultural Policy affirms culture's role in national identity and development and outlines priorities related to cultural protection, institutional strengthening, infrastructure development, and human resource development (UNESCO, 2017). Despite this policy recognition, ecosystem mapping evidence suggests that implementation pathways for improving creative industry competitiveness—such as structured financing mechanisms, innovation and incubation systems, creative enterprise support programs, and export promotion—remain limited and fragmented (British Council, 2021). UNESCO similarly notes that many countries recognize culture's role in development but face persistent challenges in translating policy commitments into coherent economic instruments and sustained implementation capacity (UNESCO, 2022).

Institutional responsibilities for CCIs are distributed across multiple sectors and levels of government, including culture, tourism, education, trade, labor, ICT, youth, and gender programming. This multi-sectoral character creates coordination challenges, since multiple actors hold partial mandates without strong mechanisms for integration, joint planning, or consolidated sector strategies (British Council, 2021; UNESCO, 2017). UNESCO identifies institutional fragmentation as a common governance barrier in creative economy development, particularly where culture is not consistently integrated into economic planning and investment frameworks (UNESCO, 2022).

The desk review also confirms the existence of legal and institutional frameworks for copyright protection and neighboring rights in Ethiopia. However, ecosystem mapping indicates that enforcement remains a major challenge, contributing to piracy, weak licensing practices, and revenue leakage—particularly in music, publishing, and audiovisual subsectors (British Council, 2021; WIPO, 2015). WIPO emphasizes that effective copyright and related rights systems are central to sustainable creative industries because they enable creators to monetize intangible assets, attract investment, and generate measurable economic performance (WIPO, 2015).

Measurement constraints remain significant as well. UNESCO and UNCTAD emphasize that sustained investment in CCIs requires credible statistics and standardized measurement systems for GDP contribution, employment, and trade (UNCTAD, 2024a; UNESCO, 2019). Ethiopia currently lacks institutionalized systems for regular creative economy measurement, which limits the integration of CCIs into public budgeting and national development strategies and weakens evidence-based policymaking and investment prioritization (UNESCO, 2019, 2022; UNCTAD, 2024a).

3.3. CCI Subsector Mapping and Value Chain Overview

3.3.1. Subsector mapping

The desk review confirms that subsector classifications vary across institutions due to definitional differences and data constraints. Nevertheless, available mapping and sector evidence consistently identifies key creative subsectors such as music and live performance, film/television/audiovisual production, fashion and textiles design, visual arts and crafts, publishing, design and advertising services, and digital creative content (British Council, 2021; UNCTAD, 2024a). This challenge is consistent with international experience: the UK DCMS framework stresses that clear definitions aligned to national industry codes are essential for measuring the creative economy's contribution to GDP and employment, while UNESCO's Culture|2030 Indicators likewise emphasize definitional clarity as a core requirement for monitoring cultural and creative economy indicators (DCMS, 2016; UNESCO, 2019).

Subsector organization and data availability differ substantially across creative domains. Some subsectors—such as event-based economies, fashion and tailoring, crafts markets, and informal music production—have large participation and employment potential but weak formal documentation. Other subsectors—such as formal publishing houses, registered production firms, and structured institutions—may have smaller participation but stronger administrative records. This unevenness is particularly relevant where sector measurement relies heavily on administrative sources (British Council, 2021; UNESCO, 2019; UNCTAD, 2024a).

3.3.2. Value chain overview

Across subsectors, creative activity is strongest in the creation and production segment—artists, designers, producers, workshops, studios, and performance-based work. However, formal rights management systems (licensing, collective management, contract enforcement), structured distribution channels (publishing distribution, cinema networks, platform monetization), and sustainable business models remain underdeveloped (British Council, 2021; WIPO, 2015). WIPO emphasizes that rights management and commercialization systems function as essential economic infrastructure for CCIs; where these systems are weak, substantial economic value exists but may not be effectively monetized or captured in formal statistics (WIPO, 2015).

The desk review also indicates that CCIs include a large ecosystem of supporting service workers and enterprises—sound and lighting technicians, event logistics providers, stylists, editors, printers, marketing agents, and digital service providers. These actors contribute significantly to employment and value chains but are often excluded from narrow subsector definitions. UNESCO and UNCTAD highlight that comprehensive measurement should incorporate both core creative production and associated value chain services where creative content is produced, distributed, and consumed (UNESCO, 2019; UNCTAD, 2024a).

3.4. Historical and Emerging Trends (Growth Patterns and Market Structure)

Evidence suggests continuity in heritage-based cultural production alongside an increasing shift toward entrepreneurial and market-oriented creative enterprise. This includes growth in branding, fashion entrepreneurship, digital media production, and professionalization of studios and creative service firms (British Council, 2021; UNESCO, 2022). Digital platforms and social media have expanded visibility and audience reach for Ethiopian creators; however, monetization remains constrained by weak rights enforcement, limited licensing systems, and revenue capture challenges, limiting reinvestment and income stability (British Council, 2021; UNESCO, 2022; WIPO, 2015).

Sector studies further suggest that the film and audiovisual subsector has become increasingly dynamic, with rising content production and market demand, while continuing to face structural constraints related to financing, distribution infrastructure, professional training, and market organization (Selam Ethiopia, 2025). Event-based creative economies (concerts, festivals, weddings, and private events) also represent a major income and employment channel but remain predominantly informal and seasonal, making their contribution difficult to capture in conventional accounting systems (British Council, 2021; UNESCO, 2019).

3.5. Key Stakeholders and Sector Actors

The CCI ecosystem is multi-actor and involves public institutions, private enterprises, associations, intermediaries, and development partners. Key stakeholder groups include public institutions responsible for culture, tourism, education, trade, labor, ICT, youth, and gender; creative practitioners and creative enterprises (formal and informal); intermediaries such as promoters, venues, distributors, broadcasters, advertisers, and digital platforms; professional associations and networks; and international partners supporting capacity building and policy dialogue (British Council, 2021; UNESCO, 2017, 2022; UNCTAD, 2024a). However, stakeholder platforms are often fragmented, and collective organization remains limited, reducing policy influence, undermining coordinated market reforms, and weakening advocacy for investment. UNESCO notes that collective platforms and civil society engagement are important for strengthening sector governance and safeguarding creative rights and freedoms (UNESCO, 2022).

4. ECONOMIC CONTRIBUTION OF CCIS TO GDP AND VALUE ADDED

4.1. Size and Macroeconomic Footprint

This findings section triangulates two complementary evidence streams: (i) published secondary literature and proxy macro-estimates, and (ii) a compiled secondary administrative/documentary dataset assembled during the study from accessible records held by relevant sector institutions and stakeholders. The compiled dataset of CCIs in Ethiopia; it reflects only institutions and enterprises for which verifiable records were obtained during the compilation period. Consequently, the distributions presented below should be interpreted as documented patterns within accessible records, with under-coverage expected—particularly where creative activity is informal, intermittently organized, embedded in other businesses, or weakly captured in administrative systems.

At the global level, CCIs are widely recognized as a material contributor to GDP and value creation. UNESCO's global synthesis estimates that cultural and creative industries contribute about 3.1% of global GDP (UNESCO, 2022). Cultural Action Europe in parallel and UN Conference on Trade and Development (UNCTAD) highlight the macroeconomic relevance of the creative economy through trade and digital markets, reporting that global exports of creative services reached about US$ 1.4 trillion in 2022 (UNCTAD, 2024). These global benchmarks are important for Ethiopia because they clarify that creative value creation can be substantial even where national statistical systems face persistent measurement constraints.

For Ethiopia specifically, the most structured and widely cited macro proxy remains the WIPO copyright-based industries assessment. While copyright industries do not fully cover the UNESCO CCI scope, they provide a defensible proxy for GDP or value added because they capture monetizable segments such as publishing, audiovisual production, broadcasting, and other copyright-dependent production and distribution systems. In Ethiopia, the WIPO-commissioned national study reports that copyright-based industries contributed 4.73% of GDP, while core copyright industries contributed 1.96% of GDP (Belete and Tadesse (WIPO), 2014). Read together with the global literature on structural undercounting and the growing importance of digital creative markets, these estimates imply that Ethiopia's "observed" creative industries in standard macroeconomic reporting is likely a partial view of a broader context ((UNESCO, 2022); (UNCTAD, 2024)).

4.2. Institutional Density and Economic Concentration

The institutional counts presented in this section are derived from the compiled secondary dataset assembled during the study from available administrative and documentary sources accessed through responsible sector institutions and related stakeholders. The dataset reflects only the institutions for which verifiable records were obtained and consolidated during the data compilation period. Accordingly, the results should not be interpreted as a national census of CCIs. Instead, they represent a documented subset of the CCI business firms captured in accessible sources, and they are most appropriately used to describe patterns of institutional distribution and relative concentration by domain and region within the compiled dataset. Under-coverage is expected, particularly in domains and locations where creative activity is informal, embedded within other businesses, intermittently organized, or weakly recorded in administrative systems.

The compiled secondary dataset documented 9,702 CCI enterprises across the regions included in the dataset. These institutional counts do not measure value added directly; however, they provide an important indicator of where documented/formal CCI activity is most visible within accessible records—an important consideration when interpreting economic contribution using administrative data.

Table 1: Number of CCI Enterprises by Domain and Region

CCI Domains	Addis Ababa	Amhara	Sidama	Southwest	Gambela	Oromia	Total
Cultural and Natural Heritage	32	168	46	120	33	0	**399**
Performance and Celebration	580	26	52	136	35	46	**875**
Visual Arts and Crafts	2,489	0	0	20	12	0	**2,521**
Books and Press	1,018	43	0	0	0	0	**1,061**
Audio-visual and Interactive Media	510	4	0	0	0	5	**519**
Design and Creative Services	4,250	0	0	0	0	0	**4,250**
Transversal: Equipment & supporting materials	48	0	0	0	0	0	**48**
Related Domain	0	13	4	12	0	0	**29**
Total	8,927	254	102	288	80	51	**9,702**

Source: Secondary data from Addis Ababa City Administration Culture and Tourism Bureau and own primary data (2025- 2026)

Table 1 shows a pronounced concentration of documented institutions in Addis Ababa (8,927) relative to the combined total across the other included regions (775). This pattern is consistent with Addis Ababa's role as Ethiopia's dominant hub for formal markets, service industries, and administrative visibility. However, consistent with the global literature that highlights measurement and documentation gaps—especially where informality is high—this concentration should also be interpreted as an indicator of documentation and registration asymmetries, not only economic absence in the regions ((UNESCO, 2022); (UNCTAD, 2024)).

Table 2: Share of Total Documented Institutions by Region (%)

Region	Number of institutions	Share of total (%)
Addis Ababa	8,927	92.0
South-West Ethiopia	288	3.0
Amhara	254	2.6
Sidama	102	1.1
Gambela	80	0.8
Oromia	51	0.5
Total	**9,702**	**100.0**

Source: Secondary data from Addis Ababa City Administration Culture and Tourism Bureau and own primary data (2025- 2026)

Table 2 presented that 92.0% of documented institutions in the compiled dataset are located in Addis Ababa. The remaining 8.0% is distributed across the other regions captured in the dataset, led by South-West Ethiopia (3.0%) and Amhara (2.6%). This distribution suggests that the administratively visible (documented) layer of the creative economy is heavily urban-centric within the accessible records—an important caveat when interpreting macroeconomic contributions using secondary sources.

Table 3: Share of Total Documented Institutions by Domain (%)

CCI Domain	Number of institutions	Share of total (%)
Design and Creative Services	4,250	43.8
Visual Arts and Crafts	2,521	26.0
Books and Press	1,061	10.9
Performance and Celebration	875	9.0
Audio-visual and Interactive Media	519	5.3
Cultural and Natural Heritage	399	4.1
Transversal: Equipment & supporting materials	48	0.5
Related Domain	29	0.3
Total	**9,702**	**100.0**

Source: Secondary data from Addis Ababa City Administration Culture and Tourism Bureau and own primary data (2025- 2026)

The data presented in Table 3 depicted that Design and Creative Services (43.8%) and Visual Arts and Crafts (26.0%) together account for 69.8% of all documented CCI institutions in the compiled dataset. From an economic contribution perspective, the dominance of these two domains is consistent with a pattern observed in many settings where service-oriented creative activities (e.g., design, branding, advertising-linked services) and craft-linked enterprise forms tend to be more administratively visible—particularly in large urban markets—because they are more likely to appear in registries, licensing systems, and formal business documentation (UNESCO, 2022). In the Ethiopian context, creative-economy mapping literature also highlights the expanding role of urban creative entrepreneurship and the growing presence of design/fashion and creative services value chains, which can increase the measured "institutional footprint" of these domains in accessible records (British Council, 2021).

At the same time, the domain shares should not be interpreted as a direct proxy for value added or GDP contribution, because institutional counts capture where records exist rather than the full scale of economic activity. This limitation is particularly important for domains where value creation can be high even when the number of formally recorded entities is modest. For example, Audio-visual and Interactive Media (5.3%) represents a smaller share of documented institutions, yet international evidence shows that digitalization is reshaping creative value chains and enabling significant output, revenues, and exports through fewer but more scalable firms and platform-based production/distribution models (UNCTAD, 2024). Relatedly, copyright-based measurement guidance emphasizes that publishing and audiovisual-related activities (reflected here under Books and Press, and Audio-visual and Interactive Media) are often among the most measurable—and economically consequential—

segments of the creative economy because their monetization channels are more traceable through markets, rights-based transactions, and formal intermediaries (WIPO, 2015).

Overall, Table 3 suggests that the recorded CCI ecosystem in available administrative sources is concentrated in domains that are easier to document (notably creative services and crafts). Consistent with UNESCO's measurement guidance, this reinforces the conclusion that Ethiopia's CCI economic contribution is likely undercounted in conventional ways unless complementary approaches (e.g., improved classification and satellite-account style measurement) are used to better capture informal production, embedded creative services, and digitally mediated value creation ((UNESCO, 2022); (UNCTAD, 2024)).

4.2. Capital Profile and Wealth Formation (Addis Ababa Only)

To move from institutional presence toward economic depth, the study extracted capital information (initial and current capital) where recorded in administrative sources. Capital status was obtainable only for Addis Ababa enterprises within the compiled records. Accordingly, the capital profile below is strictly an Addis Ababa subset and should not be generalized to other regions or to all CCI institutions. This means the table below should be interpreted as an Addis Ababa–based capital profile of documented enterprises with available records, not as a complete picture of capital formation in Ethiopia's CCIs, nor as representative of all regions and all institutions captured in the broader institutional listing.

Table 4: CCI Enterprises with Recorded Capital, Initial Capital, and Current Capital

Domain	Number of institutions with recorded capital	Initial Capital	Current Capital	Average Current Capital per Enterprise (ETB)
Cultural and Natural Heritage	29	1,019,429	1,852,000	63,862
Performance and Celebration	222	11,041,989	68,884,623	310,291
Visual Arts and Crafts	1,373	54,122,401	63,097,644	45,956
Books and Press	154	838,941	55,864,600	362,757
Audio-visual and Interactive Media	509	695,040,647	816,234,451	1,603,604
Design and Creative Services	4,243	316,427,752	300,221,500	70,757
Transversal: Equipment & supporting materials	48	107,746,500	28,804,000	600,083
Related Domain	–	–	–	
Total (Addis Ababa)	**6,578**	**1,186,237,659**	**1,334,958,818**	**202,943**

Source: Secondary data from Addis Ababa City Administration Culture and Tourism Bureau

The data presented in Table 4, captured 6,578 Addis Ababa–based CCI institutions with recorded capital information, amounting to ETB 1,186,237,659 in initial capital and ETB 1,334,958,818 in current capital. This indicates a net increase of ETB 148,721,159 between initial and current capital among the enterprises for which capital records were available. Importantly, this capital profile reflects only the subset of Addis Ababa enterprises with documented capital status and should not be generalized to all CCI institutions or to other regions where capital data were not accessible in the compiled sources.

Across domains, the capital structure is highly concentrated in a small number of segments. When current capital is examined alongside the number of enterprises reporting capital, clear differences in capital intensity per enterprise emerge.

- Audio-visual and Interactive Media shows the largest capital base, with 509 institutions reporting ETB 695,040,647 in initial capital and ETB 816,234,451 in current capital. This translates into an average current capital of approximately ETB 1,603,604 per enterprise, making it the most capital-intensive domain in the dataset. This pattern is consistent with the relatively high asset requirements of film production, studios, cinema infrastructure, digital editing systems, and technology-enabled media services.
- Transversal: Equipment & Supporting Materials (48 institutions) reports ETB 28,804,000 in current capital, corresponding to an average of approximately ETB 600,083 per enterprise. Although smaller in scale, this domain reflects relatively high capital intensity due to equipment ownership, rental systems, and production support assets.
- Books and Press (154 institutions) increases from ETB 838,941 to ETB 55,864,600 in current capital, with an average of approximately ETB 362,757 per enterprise. This relatively high per-enterprise capital likely reflects machinery, printing infrastructure, and production-related fixed assets.
- Performance and Celebration (222 institutions) shows a substantial rise from ETB 11,041,989 to ETB 68,884,623, corresponding to an average of approximately ETB 310,291 per enterprise. This suggests moderate capital requirements related to staging equipment, sound systems, lighting, and event production logistics.
- Design and Creative Services, while the largest domain by number of institutions reporting capital (4,243 institutions), shows current capital of ETB 300,221,500, corresponding to a comparatively lower average of approximately ETB 70,757 per enterprise. Despite its large institutional base, this indicates that the domain is structurally dominated by small-scale, service-oriented firms with relatively low fixed-asset requirements.
- Cultural and Natural Heritage (29 institutions) shows modest growth from ETB 1,019,429 to ETB 1,852,000, corresponding to an average of approximately ETB 63,862 per enterprise, reflecting the typically lower-capital profile of many heritage-oriented institutions in formal registries.
- Visual Arts and Crafts, comprising 1,373 institutions, records current capital of ETB 63,097,644, corresponding to an average of approximately ETB 45,956 per enterprise, reinforcing its characterization as a predominantly micro- and small-enterprise segment with relatively low capital intensity.

Taken together, the evidence reveals a clear structural divide within Addis Ababa's recorded CCI ecosystem. Technology-driven and equipment-dependent domains—particularly Audio-visual and Interactive Media—are highly capital-intensive, while crafts, heritage, and service-oriented creative activities operate with significantly lower capital per enterprise. This differentiation has direct policy implications: financing instruments and investment support mechanisms for CCIs should be tailored to domain-specific capital structures, combining technology and equipment financing for high-intensity domains with micro-finance, working capital support, and market access interventions for labor-intensive, low-capital segments.

This pattern aligns with UNCTAD's broader characterization of the contemporary creative economy as increasingly shaped by digital production systems and scalable creative services markets (UNCTAD, 2024), while still encompassing a wide base of micro-enterprises and culturally embedded creative livelihoods.

4.3. Profitability Profile and Growth Signals

A further indicator of economic contribution is enterprise performance through gross profit. Gross profit records (2012–2014) were available only for a subset of institutions compiled from secondary sources; therefore, the series below should be treated as a recorded administrative snapshot, not sector-wide profitability. This limitation is consistent with the broader measurement challenge highlighted in the creative-economy literature—namely that creative activity is frequently undercounted where informality is high and where data systems do not yet apply comprehensive cultural/creative accounting approaches (UNESCO, 2022; UNCTAD, 2024a).

Table 5: CCI Enterprises with Recorded Gross Profit, by Domain (2020/21–2022/23)

UNESCO CCI Domain	Number of Institutions	Gross Profit_2020/21	Gross Profit_2021/22	Gross Profit_2022/23	Per enterprise gross profit for the year 2022/23
Cultural and Natural Heritage	11	180,000	805,500	584,730	53,157
Performance and Celebration	570	44,699,524	50,704,875	60,761,493	106,599
Visual Arts and Crafts	498	17,722,946	21,331,539	35,161,745	70,606
Audio-visual and Interactive Media	514	39,629,608	107,827,374	144,980,569	282,063
Design and Creative Services	98	46,925,924	53,314,824	66,192,174	675,430
Transversal: Equipment & supporting materials	46	27,875,144	17,650,144	61,117,144	1,328,634
Total	**1,737**	**177,033,146**	**251,634,256**	**368,797,855**	**212,319**

Source: Secondary data from Addis Ababa City Administration Culture and Tourism Bureau

Across the 1,737 institutions with recorded gross profit, total recorded gross profit increases from ETB 177.0 million in 2020/21 to ETB 368.8 million in 2022/23, representing an absolute increase of ETB 191.8 million and a growth rate of approximately +108.3% over the three-year period. This upward movement should be interpreted as growth in recorded gross profit within accessible administrative datasets, rather than as definitive sector-wide profitability growth, since coverage may vary across years and informal activities remain underrepresented in official records (UNESCO, 2022; UNCTAD, 2024a).

A defining feature of the 2022/23 profitability profile is the strong concentration of gross profit in Audio-visual and Interactive Media, which contributed ETB 144.98 million, accounting for approximately 39.3% of total recorded gross profit in that year. Between 2020/21 and 2022/23, recorded gross profit in this domain increased by approximately +266%, making it the strongest growth driver in the dataset. This trend is consistent with global evidence that digitalization, streaming platforms, and scalable media production models are transforming the creative economy by enabling wider distribution and higher monetization potential in screen-based industries (UNCTAD, 2024a).

When profitability is examined on a per-enterprise basis, additional structural differences emerge. In 2022/23:

- Transversal: Equipment & Supporting Materials records the highest average gross profit per enterprise at approximately ETB 1,328,634, despite representing only 46 institutions. This indicates high profitability concentration among equipment and production-support providers, likely reflecting capital-intensive rental and technical service models.
- Design and Creative Services follows with an average of ETB 675,430 per enterprise, suggesting that although the domain includes relatively fewer institutions (n = 98), it generates comparatively strong returns per firm—consistent with higher-value consulting, advertising, branding, and professional service models.
- Audio-visual and Interactive Media records an average of ETB 282,063 per enterprise, indicating both scale and strong profitability across a larger institutional base (514 institutions).
- In contrast, Performance and Celebration, despite having the largest number of institutions (n = 570), records a lower per-enterprise average of ETB 106,599, suggesting that profitability is spread across many smaller or event-based enterprises.

- Visual Arts and Crafts reports an average of ETB 70,606 per enterprise, while Cultural and Natural Heritage records the lowest average at ETB 53,157 per enterprise, reflecting the typically smaller-scale and less capital-intensive nature of these segments.

The per-enterprise indicators demonstrate a clear structural differentiation within the CCI ecosystem: while Performance and Celebration and Visual Arts and Crafts absorb large numbers of institutions, higher profitability per enterprise is concentrated in equipment-intensive, service-oriented, and technology-driven domains.

Other domains show steady but more moderate aggregate growth. Design and Creative Services increased from ETB 46.9 million in 2020/21 to ETB 66.2 million in 2022/23 (approximately +41.1%), while Performance and Celebration grew from ETB 44.7 million to ETB 60.8 million (approximately +35.9%). Visual Arts and Crafts nearly doubled over the period, increasing from ETB 17.7 million to ETB 35.2 million (approximately +98.4%), indicating improving recorded profitability among captured enterprises.

The Transversal: Equipment & Supporting Materials category displays a non-linear trajectory, declining in 2021/22 before rising sharply to ETB 61.1 million in 2022/23. Such volatility is plausible in supplier and rental segments where profitability may be concentrated among a small number of firms and where reporting coverage can vary across years.

4.4. Trends, Capital Structure, and Potential Growth (Economic Contribution Lens)

The gross profit evidence indicates strong recorded profitability momentum within the subset of CCI institutions for which data were available, particularly in domains aligned with digitization and scalable content-based value chains. Total recorded gross profit more than doubled over the reference period, with Audio-visual and Interactive Media emerging as a dominant contributor. This pattern is consistent with international evidence that the contemporary creative economy is increasingly driven by digital transformation, platform-based distribution, and technology-enabled content production, which allow relatively small numbers of enterprises to generate substantial value (UNCTAD, 2024).

These profitability dynamics should be interpreted alongside macro-level proxy evidence, particularly the copyright-based industries framework, which remains a widely used method for approximating creative-economy value added and GDP contribution in contexts where Cultural Satellite Accounts are not yet institutionalized (Belete and Tadesse, 2014; WIPO, 2014; WIPO, 2015). Together, the evidence suggests that segments of Ethiopia's CCIs—especially those linked to audiovisual media and digital services—have measurable value-creation potential, even within partial administrative datasets.

Further insight emerges when profitability is examined in relation to capital intensity. A comparison of average capital per enterprise and average gross profit per enterprise (2022/23) reveals a structurally differentiated CCI ecosystem.

Technology- and equipment-intensive domains—particularly Audio-visual and Interactive Media—display both high capital intensity (ETB 1.60 million per enterprise) and strong per-enterprise profitability (ETB 282,063). This suggests that domains requiring significant upfront investment in production infrastructure, digital systems, and technical assets are also capable of generating higher average returns per firm, consistent with scalable monetization models.

Similarly, Transversal: Equipment & Supporting Materials, with capital intensity of approximately ETB 600,083 per enterprise, records the highest per-enterprise gross profit (ETB 1,328,634). Although smaller in number, enterprises in this segment appear to operate with concentrated asset bases and relatively high margins, reflecting the central role of production infrastructure within creative value chains.

By contrast, Visual Arts and Crafts and Cultural and Natural Heritage exhibit low capital intensity (ETB 45,956 and ETB 63,862 per enterprise, respectively) and correspondingly lower per-enterprise profitability (ETB 70,606 and ETB 53,157). These segments appear structurally labor-intensive and micro-enterprise dominated, with limited asset accumulation and thinner margins.

Design and Creative Services presents an intermediate but economically significant profile: moderate capital intensity (ETB 70,757 per enterprise) combined with relatively high per-enterprise profitability (ETB 675,430). This suggests that professional, knowledge-driven creative services may generate substantial returns without heavy fixed asset requirements, drawing primarily on intellectual, reputational, and relational capital.

Taken together, the evidence points to a multi-tiered CCI structure composed of:

- High-capital, high-return technology segments (Audio-visual);
- Asset-intensive supplier segments with concentrated profitability (Equipment & Support);
- Knowledge-driven service segments with strong margins but moderate asset bases (Design & Creative Services);
- Labor-intensive, low-capital livelihood segments (Crafts, Heritage).

From a macroeconomic perspective, this differentiation has direct policy implications. A uniform support model would be inefficient. Capital-intensive domains may require equipment finance, digital infrastructure investment, credit guarantees, and strengthened intellectual property systems. In contrast, labor-intensive segments require microfinance, working capital access, market integration, and formalization pathways. As emphasized in global cultural economy literature, sustained and broad-based value-added growth depends not only on sector expansion but on strengthening enabling conditions—particularly rights management, financing mechanisms, business capabilities, and improved measurement systems that capture both formal and informal creative production (UNESCO, 2022; WIPO, 2015).

4.5. Public and Private Investments and Spending Patterns

Secondary evidence consistently indicates that CCIs' economic contribution depends not only on creativity and demand, but also on enabling investment conditions—finance, infrastructure, skills systems, and intellectual property (IP) governance. In many developing-country contexts, creative enterprises tend to face structural financing constraints (e.g., limited access to formal credit, reliance on self-financing, and irregular project-based funding), which can suppress productivity improvements and constrain scale-up even where markets are growing (British Council & HEVA Fund, 2020). At the same time, global evidence shows that digitization is reshaping value creation and market access in CCIs—often increasing the importance of technology, data, and rights management systems for revenue capture and investment decisions (UNCTAD, 2024). In parallel, UNESCO (2022) emphasizes that without coherent policy and investment frameworks (including support infrastructure and governance mechanisms), cultural and creative activity may expand in participation while remaining under-monetized and under-recorded in economic statistics.

Within Ethiopia, these dynamics imply that investment patterns will likely be uneven across cultural domains and subsectors within the domains with stronger formalization and clearer monetization channels (e.g., audiovisual media, publishing/press, and some creative services) are generally more visible to finance and administration, while highly informal segments may remain economically active but financially "invisible." The ownership evidence compiled in this study provides an additional institutional proxy for how investment responsibility and spending patterns may be distributed across public entities, private firms, and collective structures—recognizing that the table below reflects recorded Addis Ababa institutions only, based on available secondary sources (not a census).

Ownership Structure of Recorded CCI Enterprises /Institutions

Ownership/organizational structure was only available for Addis Ababa creative business enterprises in the compiled dataset; therefore, the results below should be interpreted strictly as the ownership profile of recorded Addis Ababa CCI enterprises with ownership information, not as a national CCI ownership picture. This limitation is material, given the well-documented challenges of administrative under coverage in creative economies with substantial informality (UNESCO, 2022).

Table 6: Overall distribution by ownership type (Addis Ababa only; N = 8,651)

Ownership type	Number of institutions	Share of total (%)
Government / Public sector	489	5.7
Private sector	7,142	82.6
Association / Cooperative (membership-based)	1,020	11.8
Total	**8,651**	**100.0**

Source: Secondary data from Addis Ababa City Administration Culture and Tourism Bureau

The Addis Ababa ownership snapshot is strongly private-sector-led (82.6%), implying that most recorded creative activity in the capital is organized through privately owned entities—consistent with broader evidence that commercialization in the CCIs is often driven by private investment and market-based intermediation (UNCTAD, 2024). Associations/cooperatives (11.8%) represent a meaningful institutional layer, which is relevant in creative economies where collective action can reduce transaction costs (shared production inputs, bargaining, and market access), particularly under financing constraints (British Council & HEVA Fund, 2020). The public sector share (5.7%) suggests that direct state ownership is limited within the recorded Addis Ababa subset—though the public sector may still influence the economy indirectly through regulation, procurement, public cultural institutions, and infrastructure investments (UNESCO, 2022).

Table 7: Ownership structure by CCI domain

CCI domain	Institutions (N)	Share of total (%)	Government N (% within domain)	Private N (% within domain)	Association N (% within domain)
Cultural and Natural Heritage	32	0.4	8 (25.0%)	9 (28.1%)	15 (46.9%)
Performance and Celebration	580	6.7	361 (62.2%)	174 (30.0%)	45 (7.8%)
Visual Arts and Crafts	2,213	25.6	1 (0.0%)	1,949 (88.1%)	263 (11.9%)
Books and Press	1,018	11.8	99 (9.7%)	905 (88.9%)	14 (1.4%)
Audio-visual and Interactive Media	510	5.9	11 (2.2%)	469 (92.0%)	30 (5.9%)
Design and Creative Services	4,250	49.1	7 (0.2%)	3,598 (84.7%)	645 (15.2%)
Transversal: Equipment & supporting materials	48	0.6	2 (4.2%)	38 (79.2%)	8 (16.7%)
Total (Addis Ababa)	**8,651**	**100.0**	**489 (5.7%)**	**7,142 (82.6%)**	**1,020 (11.8%)**

Source: Secondary data from Addis Ababa City Administration Culture and Tourism Bureau

As the presented, the domain-by-domain ownership pattern indicates a segmented investment and governance landscape:

- Design and Creative Services is the largest recorded domain (49.1% of Addis Ababa enterprises with ownership data) and is predominantly private (84.7%), with a notable association/cooperative segment (15.2%). This structure aligns with international evidence that service-oriented creative fields can scale through market linkages, but also frequently rely on networks and collective organization to access clients, inputs, and contracts—especially where finance and business services are constrained (British Council & HEVA Fund, 2020; UNCTAD, 2024).
- Visual Arts and Crafts (25.6%) are overwhelmingly private (88.1%), consistent with craft and art enterprise models that are typically market-facing and micro-/SME-driven. In economic-contribution terms, this suggests that value capture in crafts is likely

shaped by private investment capacity and market intermediation (inputs, retail, tourism linkages), while undercounting risks remain high where production is informal (UNESCO, 2022).

- Books and Press (11.8%) is also strongly private-led (88.9%), with a modest public share (9.7%). This is consistent with the general pattern that publishing/press-related activities are often part of the more “measurable” creative economy because they connect to formal distribution systems and rights-based monetization channels—although enforcement and financing constraints can still limit investment and growth (UNESCO, 2022; WIPO, 2015).
- Performance and rituals appear the most public-sector-dominant domain in this Addis Ababa snapshot (62.2% government). This suggests that the recorded performance institutional layer (as captured in the accessible sources) is strongly linked to publicly owned/managed entities. However, performance economies also include substantial informal and event-based markets that are often not fully registered, meaning the private share in the full ecosystem may be higher than this administrative snapshot implies (UNESCO, 2022).
- Audio-visual and Interactive Media shows the strongest private dominance among major domains (92.0% private). Given UNCTAD’s emphasis that digitization is transforming creative industry value chains and monetization models, the private-heavy structure in this domain is consistent with market-led investment in production capabilities, distribution, and technology-enabled services—even if the number of formal entities appears smaller than other domains (UNCTAD, 2024).
- Cultural and Natural Heritage is small in Addis Ababa (0.4%) but has the highest relative association/cooperative share (46.9%), alongside a meaningful public presence (25.0%). This composition is plausible where heritage-linked activities are organized through membership-based entities, community-linked groups, or associations, and where public stewardship is common (UNESCO, 2022).

Overall, the Addis Ababa ownership evidence reinforces a central implication for “investment and spending patterns”: most recorded CCI activity is structured through private entities, implying that private capital and private spending decisions are likely major determinants of observed value creation in the documented institutional layer. At the same time, the presence of public dominance in performance and notable association/cooperative roles in heritage and design/creative services suggests that economic contribution is shaped by a mixed institutional model—market-led in many domains, but with selective public and collective organizational importance. These results should be interpreted with caution because they reflect only Addis Ababa institutions with recorded ownership type, within a secondary dataset assembled from accessible records rather than a census (UNESCO, 2022).

5. EMPLOYMENT AND LABOR MARKET DYNAMICS

5.1. Employment by Subsector

Both the literature and the compiled dataset indicate that employment in Ethiopia's CCIs is unevenly distributed across subsectors, reflecting differences in enterprise structures, levels of formalization, and the extent to which subsectors depend on scalable institutional systems. Internationally, the literature emphasizes that copyright-linked subsectors (publishing, media, broadcasting, advertising-related services, audiovisual production) tend to be more visible and measurable in employment and output statistics, largely because they operate through structured value chains and monetizable institutional arrangements (WIPO, 2015). The Ethiopian copyright industries study similarly found that measured employment is concentrated in copyright-linked activities that have stronger institutional bases and measurable distribution channels (Belete & Tadesse, 2014).

At the same time, mapping evidence for Ethiopia highlights that the broader employment base includes highly labor-intensive activities such as crafts production, performance/events, photography, and informal cultural trade—subsectors that can absorb large numbers of workers because they often have lower entry barriers and rely on flexible arrangements such as project-based work and informal hiring. This reinforces a key interpretation issue: the largest employment segments in CCIs may not always appear clearly in conventional labor statistics unless occupational classifications and administrative capture improve (British Council, 2022; UNESCO, 2022).

Table 8: Employment in CCIs by Domain and Region

CCI Domains	Addis Ababa	Amhara	Sidama	Southwest	Gambela	Oromia	Total
Cultural and Natural Heritage	1,028	2,456	12	600	495	–	4,591
Performance and Celebration	15,754	862	1	2,720	1,500	1,729	22,566
Visual Arts and Crafts	8,795	–	–	24	86	–	8,905
Books and Press	3,493	129	–	–	–	–	3,622
Audio-visual and Interactive Media	18,311	60	–	–	–	75	18,446
Design and Creative Services	11,900	–	–	–	–	–	11,900
Transversal: Equipment & supporting materials	760	–	–	–	–	–	760
Related Domain	–	–	–	2	–	–	2
Total	**60,041**	**3,507**	**13**	**3,346**	**2,081**	**1,804**	**70,792**

Source: Secondary data from Addis Ababa City Administration Culture and Tourism Bureau and own primary data (2025- 2026)

The compiled secondary dataset documents a total of 70,792 CCI workers across the included regions and domains. Consistent with the institutional concentration observed elsewhere in the report, employment is strongly concentrated in Addis Ababa, which accounts for 60,041 workers (84.8%), while the combined total across the other regions is 10,751 workers (15.2%). This pattern reflects Addis Ababa's role as the country's main hub for formal markets, production infrastructure, and administratively visible enterprises. However, the literature cautions that CCIs are often structurally undercounted—particularly in contexts where informality is high—meaning that regional employment may be significantly larger than what is captured in accessible administrative sources (British Council, 2022; ILO, 2015; UNESCO, 2022).

Across domains, recorded employment is dominated by Performance and Celebration (22,566; 31.9%) and Audio-visual and Interactive Media (18,446; 26.1%), followed by Design and Creative Services (11,900; 16.8%) and Visual Arts and Crafts (8,905; 12.6%). Together, these four domains account for the majority of recorded employment in the dataset, reflecting their labor intensity and the breadth of their value chains. This pattern is consistent with global evidence that the CCIs generate employment not only through core creative occupations but also through extensive support and technical functions that scale with event activity, media production, and creative services (UNESCO, 2022; UNCTAD, 2024).

The domain distribution also highlights important contrasts between institutional counts and employment intensity. For example, while Design and Creative Services includes high institutional density in earlier tables, it also records substantial employment (11,900 workers), implying a sizable workforce base within the formally visible segment of the capital's creative service economy. Similarly, Audio-visual and Interactive Media shows strong recorded employment (18,446), consistent with the literature emphasizing that audiovisual industries typically require large support workforces, technical teams, and production infrastructure (Belete & Tadesse, 2014; WIPO, 2015). However, it is important to interpret these figures as recorded employment within the compiled dataset, not as a definitive measure of total CCI employment.

One notable exception to Addis Ababa dominance is Cultural and Natural Heritage, where regional employment is particularly significant. Amhara records 2,456 workers, representing 53.5% of total employment in this domain, compared to 1,028 workers in Addis Ababa (22.4%). This distribution aligns with expectations that heritage-linked employment is often geographically tied to heritage sites, museums, cultural institutions, and tourism-related activity outside the capital. Such heritage-based employment patterns are widely recognized in cultural economy literature as being spatially distributed according to cultural assets and historical resources rather than market centralization alone (UNESCO, 2022).

Overall, Table 8 supports the conclusion that Ethiopia's CCIs provide substantial employment opportunities across multiple domains, but that the measured employment profile is shaped heavily by administrative visibility and data availability, with Addis Ababa dominating the recorded data. This finding reinforces the importance of improving cultural labor measurement systems and capturing informal and semi-formal employment structures—particularly in regional cultural economies where creative work is likely under-recorded (British Council, 2022; ILO, 2015).; UNESCO, 2022).

5.2. Employment Size in CCIs (Formal and Informal)

The evidence compiled for this study confirms that Cultural and Creative Industries (CCIs) represent a meaningful source of employment and livelihood opportunities in Ethiopia, particularly in urban settings and among youth. This finding aligns with the global literature, which consistently characterizes CCIs as employment-intensive sectors because they rely more on human creativity and labor than on physical capital and because they generate jobs not only in creative occupations (artists, designers, performers, producers) but also across a broader ecosystem of support services—such as event logistics, technical production, marketing, distribution, retail, and administrative support (UNESCO, 2022; UNCTAD, 2024).

In the Ethiopian context, the strongest available secondary proxy estimate is provided by the copyright-based industries study conducted under the WIPO framework, which estimated that copyright industries employed 240,287 persons in 2012, representing 4.2% of Ethiopia's urban employed population across economic sectors (Belete & Tadesse, 2014). This evidence is highly informative because copyright industries cover only a portion of the broader CCI contexts. Therefore, the total employment footprint of the CCIs is likely larger once creative domains such as crafts, cultural heritage-linked activity, informal performance economies, and emerging digital creative work are more fully captured in official statistics and administrative systems (Belete & Tadesse, 2014; UNESCO, 2022).

Importantly, Ethiopia's CCI labor market is also shaped by high informality, which is typical of many low-income and lower-middle-income economies where own-account work, micro-enterprises, and casual employment dominate service and cultural sectors. According to international labor definitions, informal employment includes work that is not regulated or protected by legal or regulatory frameworks and often includes own-account workers and employment in informal sector enterprises (ILO, 2015). This labor structure is particularly relevant for Ethiopia's CCIs, where creative work is commonly generated through freelance production, micro-enterprise trade (e.g., crafts, small-scale fashion), and event-based hiring arrangements that are often not fully captured in administrative records or standard labor statistics (British Council, 2022).

Formalization Status of Recorded CCI Enterprises (Licensed vs. Unlicensed)

Licensing status information was available only for Addis Ababa within the compiled secondary dataset. Therefore, the results below should be interpreted as describing the formalization profile of recorded Addis Ababa CCI business activities for which licensing information was obtained, rather than representing the national CCI ecosystem or a census of institutions. As with other administrative indicators, under-coverage is expected—particularly for smaller and informal institutions that may not appear in accessible registries.

Table 9: Formalization Status of Recorded CCI Enterprises by Domain

CCI Domain	Licensed	Unlicensed	Total	Formalization Rate [2] (% Licensed)
A. Cultural and Natural Heritage	19	13	**32**	59.4%
B. Performance and Celebration	139	441	**580**	24.0%
C. Visual Arts and Crafts	1,273	857	**2,130**	59.8%
D. Books and Press	111	44	**155**	71.6%
E. Audio-visual and Interactive Media	218	253	**471**	46.3%
F. Design and Creative Services	3,793	457	**4,250**	89.2%
Transversal: Equipment & supporting materials	12	36	**48**	25.0%
Related Domain	–	–	–	–
Total (Addis Ababa)	**5,565**	**2,101**	**7,666**	**72.6%**

Source: Secondary data from Addis Ababa City Administration Culture and Tourism Bureau

The licensing results indicate that the recorded CCI institutional landscape in Addis Ababa is predominantly formalized, although the degree of formalization varies substantially across domains. In total, 7,666 institutions had licensing information recorded, of which 5,565 were licensed and 2,101 were unlicensed, implying an overall Formalization Rate of 72.6%. This suggests that, within the subset captured in administrative records, most CCI institutions in Addis Ababa operate under a licensing framework. However, the presence of 27.4% unlicensed institutions also confirms that informality remains a significant structural feature, even in the capital.

Formalization is strongest in Design and Creative Services, which records 3,793 licensed institutions out of 4,250, corresponding to a Formalization Rate of 89.2%. This high rate likely reflects that many design and creative service enterprises (e.g., advertising-

2. Note: Formalization Rate = Licensed ÷ (Licensed + Unlicensed) × 100

linked services, consulting, event design, studio services, and digital service providers) tend to function within business registration and licensing systems, especially when serving formal clients, operating contracts, or requiring permits.

The second highest formalization level is observed in Books and Press, where 111 out of 155 institutions are licensed, yielding a Formalization Rate of 71.6%. This pattern is plausible given that printing, publishing, and press-related activities often require stronger regulatory compliance and formal operational status to access supply chains, contracts, and distribution systems.

In contrast, the lowest formalization levels are recorded in Performance and Celebration and Transversal Equipment & Supporting Materials. Performance and Celebration has only 139 licensed institutions out of 580, corresponding to a Formalization Rate of 24.0%, while Transversal Equipment shows 12 licensed out of 48 (25.0%). These low rates likely reflect the fact that performance-related activity is frequently organized through event-based, temporary, and freelance arrangements, and therefore many actors operate outside consistent licensing systems. Similarly, equipment supply and rental services may include informal traders and temporary providers that are not systematically registered in accessible datasets.

Domains such as Visual Arts, Crafts and Cultural and Natural Heritage display moderate formalization, with formalization rates of 59.8% and 59.4%, respectively. This indicates a mixed structure where a formal institutional layer is visible, but a substantial informal segment remains active. In crafts and heritage-related activities, informality is common due to micro-enterprise structures, self-employment, and the embedded nature of some creative activity within broader household livelihoods and local markets.

Finally, Audio-visual and Interactive Media shows a Formalization Rate of 46.3% (218 licensed out of 471), indicating that nearly half of recorded institutions in this domain remain unlicensed. Given the rapid growth of digital content creation, production services, and platform-based media work, this result is consistent with a sector in transition—where formal studios and media houses coexist with many informal creators, freelancers, and small production enterprises.

Overall, these findings reinforce a key structural characteristic of Ethiopia's creative industry: even in Addis Ababa, the CCI context includes both formal and informal segments, and formalization varies strongly depending on the domain's business model, regulatory exposure, and reliance on contracts and structured value chains. For interpretation, these results should be treated as a formalization profile of the recorded Addis Ababa subset, not as a national estimate, since comparable licensing data were not available for other regions in the compiled dataset.

5.3. Employment by Gender and Age (Youth-Focused Lens)

Secondary evidence suggests that youth represent a major share of Ethiopia's creative workforce, reflecting the demographic profile of the country and the sector's function as an entry point into income generation where formal wage employment remains limited. The CCIs tend to attract youth because they combine cultural participation, entrepreneurship opportunities, and relatively accessible pathways into informal and freelance work, especially in music, digital content creation, design, visual arts, fashion, and event economies. The British Council mapping of the Ethiopian creative ecosystem explicitly focused on cultural practitioners, with particular emphasis on those aged 18–35, and documented youth-driven creative entrepreneurship and sector participation as a defining feature of the ecosystem. This indicates that CCIs represent a strategic labor market segment for youth inclusion, even when job quality is uneven and earnings are highly variable (British Council, 2022).

Gender dynamics in CCI employment are shaped by both opportunities and structural barriers. Secondary evidence suggests that women participate actively in several creative subsectors, particularly crafts, fashion, cultural trade, and some creative services. However, women's participation is often constrained by limited access to finance, restricted mobility in night-time event economies, safety concerns in certain public performance spaces, unequal access to production infrastructure, and weaker representation in leadership and market intermediaries. The DCMS and UNESCO's global evidence also emphasizes that gender equality in cultural employment depends not only on participation rates but also on the distribution of women across subsectors and roles, access to public funding and opportunities, and the capacity to formalize and scale enterprises. This framework is directly relevant to Ethiopia's creative economy context and informs interpretation of gender gaps where secondary data do not provide full measurement (DCMS 2016; UNESCO, 2022).

5.4. Job Quality and Working Conditions (Income, Stability, Contracts, Benefits)

Secondary evidence indicates that job quality in the CCIs is highly differentiated and frequently characterized by precarious work conditions. Across many CCI subsectors, employment tends to be informal, intermittent, and project-based, with irregular incomes and limited access to written contracts, social protection, health insurance, or pension systems. This is consistent with broader global evidence showing that cultural employment is often associated with non-standard forms of work, including freelance contracts, own-account production, seasonal work, and gig-based engagement. These labor market characteristics are particularly pronounced in contexts with high informality, where workers rely on networks and informal arrangements rather than institutionalized labor protections (ILO, 2015; UNESCO, 2022).

In Ethiopia, this pattern is likely amplified by the prominence of informal creative production and the limited institutionalization of labor contracting mechanisms in cultural markets. Secondary evidence suggests that while formal segments of the sector—such as media institutions, publishing houses, and larger entertainment enterprises—provide more stable employment, a significant share of creative work occurs through informal earnings arrangements. As a result, income stability is often weak, and creative workers frequently combine multiple livelihood sources across creative and non-creative work. These conditions reinforce the need to interpret employment contribution not only in terms of job counts but also in terms of job quality, stability, and resilience.

To complement this secondary evidence and ground the analysis in the lived realities of creative workers, the study collected primary data on employment conditions within selected CCI enterprises. This primary evidence was intended to move beyond broad characterizations of informality and precarious work by documenting how job quality is experienced in practice—particularly in relation to income stability, employment arrangements, written contracts, and access to professional development opportunities. Accordingly, an employee survey was administered within the enterprises reached through this study, where a total of 242 employees were interviewed using a structured tool. The survey generated quantitative and qualitative evidence on employees' socio-demographic profiles, working conditions, income patterns, and career development experiences, providing an important basis for interpreting job quality and labor market dynamics within Ethiopia's Cultural and Creative Industries.

Table 10: Socio-Demographic Characteristics and CCI Work Domain of Surveyed Employees

		Female (N=95)	Male (N=147)	Total (N=242)	Number of respondents
Age (Mean) of participants		38a	42b	40	
Highest education level	Postgraduate	3.2	3.4	3.3	8
	Bachelor	35.8	15.6	23.6	57
	Diploma	18.9	10.9	14.0	34
	TVET/ Certificate	4.2	4.1	4.1	10
	Secondary	15.8	20.4	18.6	45
	Primary	22.1	45.6	36.4	88
Marital status	Married	42.1	81.6	66.1	160
	Single	46.3	17.0	28.5	69
	Separated / Divorced	6.3	0.7	2.9	7
	Widowed	5.3	0.7	2.5	6

Culture and Creative Industries (CCIs) domain of your main work	Heritage & Handicrafts (Museums, crafts, artifacts, festivals)	30.5	58.5	47.5	115
	Visual Arts & Design (Painting, sculpture, architecture, fashion)	3.2	0.7	1.7	4
	Music & Performing Arts (Music, dance, theatre)	27.4	25.2	26.0	63
	Audiovisual & Media (Film, TV, radio, photography, animation)	26.3	14.3	19.0	46
	Publishing & Literature (Books, newspapers, magazines, digital publishing)	4.2	0.0	1.7	4
	Cultural Tourism (Heritage sites, cultural events)	0.0	1.4	0.8	2
	Digital Creative Services (Gaming, digital content, online platforms)	2.1	0.0	0.8	2
	Other Support	6.3	0.0	2.5	6

Source: Employee Survey conducted for this study among workers employed in Cultural and Creative Industries (CCI) enterprises reached through the enterprise mapping and profiling exercise (Ethiopia, 2025).

As depicted in Table 10 above, a total of 242 employees participated, including 95 females (39.3%) and 147 males (60.7%). The overall mean age was 40 years, with female employees slightly younger (38 years) than male employees (42 years).

Regarding education, the workforce is largely concentrated in basic and mid-level schooling. Primary education was most common (36.4%, n = 88), followed by bachelor's degree (23.6%, n = 57) and secondary education (18.6%, n = 45). Smaller proportions reported diploma (14.0%, n = 34) and TVET/certificate (4.1%, n = 10), while only 3.3% (n = 8) had postgraduate education. Female employees were more represented in bachelor-level education (35.8%) compared to males (15.6%), while males were more concentrated in primary education (45.6%) than females (22.1%).

Most respondents were married (66.1%, n = 160), while 28.5% (n = 69) were single. Female respondents were more likely to be single (46.3%) compared to males (17.0%), whereas males were more likely to be married (81.6%) than females (42.1%).

In terms of main CCI domain, nearly half of employees worked in Heritage and Handicrafts (47.5%, n = 115), followed by Music and Performing Arts (26.0%, n = 63) and Audiovisual and Media (19.0%, n = 46). Other domains were minimally represented. Male employees were more concentrated in Heritage and Handicrafts (58.5%), while females were relatively more represented in Audiovisual and Media (26.3%).

Table 11: Employment Conditions, Work Experience, Working Hours, and Monthly Income

		Female (N=95)	Male (N=147)	Total (N=242)	Number of respondents
Employment status	Permanent	75.8	88.4	83.5	202
	Contract	21.1	10.9	14.9	36
	Freelance	3.2	0.7	1.7	4
Employee with written contract			40.8	52.5	127
Years of experience in this occupation (Mean)		11a	20b	16	
Years of experience in this organization		7a	10b	9	
Weekly hours in main Culture and Creative Industries (CCIs) job (Mean)		44a	49b	47.13	
Monthly income from main creative work, 2024/25 (Mean)		12465a	11192a	11697.58	
Monthly income 2023/24 (Mean)		9232a	10846a	10125.08	
Monthly income 2022/23 (Mean)		7553a	9594a	8627.60	

Source: Employee Survey conducted for this study among workers employed in Cultural and Creative Industries (CCI) enterprises reached through the enterprise mapping and profiling exercise (Ethiopia, 2025).

The *Table 11* above summarizes key indicators on employment arrangements, contractual status, work experience, working hours, and income levels among employees surveyed in CCI enterprises reached through this study. Out of the 242 employees, most reported being in permanent employment (83.5%, n = 202), while 14.9% (n = 36) were employed on a contract basis, and only 1.7% (n = 4) identified as freelance workers. Permanent employment was more common among male employees (88.4% (n = 130)) than female employees (75.8% (n = 72)), while contract employment was higher among females (21.1% (n = 20)) compared to males (10.9% (n = 16)).

In terms of job formality, just over half of employees reported having a written contract (52.5% (n = 127)). A notable gender difference was observed: 70.5% of female employees (n = 67) reported having written contracts compared to 40.8% of male employees (n = 60), indicating relatively higher contract formalization among female respondents in the surveyed enterprises.

Regarding experience, employees reported substantial time in the sector. On average, respondents had 16 years of experience in their occupation, with male employees reporting longer experience (20 years) than females (11 years). Similarly, the mean years of experience in the current organization was 9 years, with males averaging 10 years and females 7 years.

In terms of workload, employees reported working an average of 47.13 hours per week in their main CCI job. Male employees worked slightly longer hours (49 hours per week) compared to female employees (44 hours per week).

The income results show an upward pattern over the three reference years. Mean monthly income from main creative work was ETB 8,627.60 in 2022/23, increasing to ETB 10,125.08 in 2023/24, and reaching ETB 11,697.58 in 2024/25. Female employees reported slightly higher average income than males in 2024/25 (ETB 12,465 vs. ETB 11,192), while males reported higher average income in 2022/23 and 2023/24 (ETB 9,594 and ETB 10,846, respectively) compared to females (ETB 7,553 and ETB 9,232). Overall, the results indicate improving earnings over time, although gender differences vary across years.

5.5. Skills Development and Training Needs

Secondary evidence indicates that skills development is a critical determinant of productivity and income in the field of CCIs, and that skills gaps constrain sector growth across multiple subsectors. International analysis highlights that creative industries benefit strongly from training systems that combine artistic skills with entrepreneurship, digital competencies, marketing, financial management, and intellectual property literacy (UNCTAD, 2024; UNESCO, 2022). This is particularly relevant for Ethiopia, where creative entrepreneurship is expanding but training pathways remain fragmented and unevenly distributed across regions and subsectors.

Mapping on Ethiopia's CCIs highlights that many creative practitioners rely on informal learning pathways, peer mentorship, and self-training rather than structured industry-standard technical education. This has implications for production quality, market competitiveness, and the ability of creative enterprises to access financing and expand distribution. The growing role of digital content creation also increases the need for skills development in digital production tools, platform monetization strategies, audience analytics, and brand management. Without skills development investment, subsectors may continue to expand in participation while remaining low productivity, limiting value added and income generation potential (British Council, 2022; UNCTAD, 2024).

To complement this secondary evidence and better understand the extent of skills development opportunities available to creative workers, the study assessed employees' access to training and the types of training received in recent years. This primary evidence provides insight into whether the current training landscape is aligned with the multi-dimensional skills required for productivity growth in CCIs—particularly in areas such as creative competence, digital skills, entrepreneurship, marketing, and financial literacy.

Table 12: Training Participation and Types of Training Received Among CCI Employees

		Female (N=95)	Male (N=147)	Total (N=242)
Received training in last 3 years		23.2	19.0	20.7
Number of respondents reported receiving training in last 3 years		Female (N=22)	Male (N=28)	Total (N=50)
Type of training received	Creative / Artistic	63.6	57.1	60.0
	Business / Entrepreneurship	18.2	7.1	12.0
	Digital skills	13.6	25.0	20.0
	Marketing / Promotion	4.5	10.7	8.0
	Financial literacy	9.1	0.0	4.0

Source: Employee Survey conducted for this study among workers employed in Cultural and Creative Industries (CCI) enterprises reached through the enterprise mapping and profiling exercise (Ethiopia, 2025).

The employee survey results presented in Table 12 show that training access remains limited across the surveyed workforce. Overall, only 20.7% (n = 50) of employees reported receiving training in the last three years, while the majority 79.3% (n = 192) had not received any training during the same period. Training participation was slightly higher among female employees (23.2% (n = 22)) compared to male employees (19.0% (n = 28)).

Among those who received training (n = 50), the most common type was Creative/Artistic training (60.0% (n = 30)), reported by 63.6% of trained females (n = 14) and 57.1% of trained males (n = 16). This suggests that training opportunities are mainly focused on strengthening core creative and artistic skills. In contrast, fewer respondents reported training that supports enterprise development and market competitiveness. Digital skills training was received by 20.0% (n = 10) of trained respondents, with higher uptake among males (25.0% (n = 7)) than females (13.6% (n = 3)). Business/entrepreneurship training was reported by 12.0% (n = 6), more common among trained females (18.2% (n = 4)) than trained males (7.1% (n = 2)). Marketing/promotion training was reported by 8.0% (n = 4), while financial literacy training was the least common (4.0% (n = 2)) and was reported only by female respondents (9.1% (n = 2)).

Overall, the findings indicate that training coverage is low and the content is heavily concentrated in artistic skills, with relatively limited access to business, marketing, and financial literacy training—skills that are essential for improving income stability, enterprise sustainability, and long-term competitiveness in Ethiopia's CCIs.

The employee survey also examined income satisfaction and employees' likelihood of continuing in creative work. These indicators help to understand whether workers feel that creative employment provides an adequate livelihood and whether they see the sector as a sustainable long-term career option.

The results presented in the Table 13 show that income satisfaction is generally low among employees working in the surveyed CCI enterprises. Only 5.8% (n = 14) of respondents reported being very satisfied with their income, while 20.2% (n = 49) reported being satisfied. Another 14.9% (n = 36) indicated a neutral position. In contrast, a large proportion reported dissatisfaction: 26.9% (n = 65) were dissatisfied and 32.2% (n = 78) were very dissatisfied. Taken together, this means that 59.1% (n = 143) of employees were dissatisfied with their income.

Table 13: Employee Income Satisfaction and Likelihood of Continuing in Creative Work

		Female (N=95)	Male (N=147)	Total (N=242)
Satisfaction with income	Very satisfied	6.3	5.4	5.8
	Satisfied	26.3	16.3	20.2
	Neutral	25.3	8.2	14.9
	Dissatisfied	27.4	26.5	26.9
	Very dissatisfied	14.7	43.5	32.2
Likelihood of continuing in creative work	Very likely	33.7	24.5	28.1
	Somewhat likely	31.6	58.5	47.9
	Not sure	18.9	8.2	12.4
	Unlikely	9.5	8.2	8.7
	Very unlikely	6.3	0.7	2.9

Source: Employee Survey conducted for this study among workers employed in Cultural and Creative Industries (CCI) enterprises reached through the enterprise mapping and profiling exercise (Ethiopia, 2025).

Differences by sex are evident. Among female employees, 6.3% (n = 6) were very satisfied and 26.3% (n = 25) were satisfied. Male employees reported substantially higher dissatisfaction, with 43.5% (n = 64) indicating they were very dissatisfied, compared to 14.7% (n = 14) of female employees. This suggests that dissatisfaction is widespread across the workforce, but is more severe among male employees in the sample.

Despite the high level of dissatisfaction with income, most employees expressed a willingness to remain in creative work. Overall, 28.1% (n = 68) reported being very likely to continue, and 47.9% (n = 116) reported being somewhat likely. Combined, this indicates that 76.0% (n = 184) of employees still see themselves continuing in the sector.

Female employees reported stronger commitment, with 33.7% (n = 32) stating they were very likely to continue, compared to 24.5% (n = 36) of male employees. Male respondents were more concentrated in the somewhat likely category (58.5% (n = 86)), which may reflect continued engagement but with greater uncertainty. A smaller share reported low commitment: 8.7% (n = 21) were unlikely and 2.9% (n = 7) were very unlikely to continue in creative work.

Overall, the findings indicate a clear tension: many employees are dissatisfied with their current earnings, yet most still intend to remain in creative work, which may reflect commitment to the profession, limited alternative employment opportunities, or expectations that conditions may improve with stronger sector support.

5.6. Barriers to Entry and Inclusion (Gender, Age, Disability, Geographic Access)

Secondary evidence suggests that entry into the CCIs is relatively accessible as compared to some formal sectors, but inclusion and advancement are constrained by structural barriers. The most frequently cited barriers in CCI sector literature include limited financing options, lack of affordable workspace and production infrastructure, weak market access mechanisms, and limited rights enforcement that undermines monetization. For women and youth, these barriers are compounded by unequal access to networks, unequal access to training and mentorship, and, in some subsectors, heightened safety and social constraints. UNESCO's evidence emphasizes that inclusion in the cultural economy depends not only on participation but also on equitable access to opportunities, funding, and decision-making structures (UNESCO, 2022).

Geographic inequalities also shape access to creative employment. Creative markets and production infrastructure tend to cluster in urban centers—particularly capital cities—where audiences, investment, and distribution systems are concentrated. This creates barriers for practitioners in smaller cities and rural areas, who may have strong cultural production capacities but limited access to commercial markets, professional networks, and national platforms. These geographic constraints are especially important for subsectors such as crafts and heritage-related creative work, where production may be widely distributed but commercialization systems remain centralized.

5.7. Entrepreneurship and MSME Ecosystem in the CCIs

Secondary evidence indicates that entrepreneurship and micro- and small enterprise development are central features of Ethiopia's CCI economy. Across subsectors such as fashion, crafts, design services, photography, digital content, and event-based production, creative workers frequently operate as micro-enterprises or own-account producers. International evidence highlights that CCIs are often manifested in activities of micro and small enterprises, and that the entrepreneurial nature of the sector is both a strength and a vulnerability: it enables flexible entry and innovation, but it also increases exposure to financing constraints, market volatility, and weak resilience mechanisms (UNCTAD, 2024; UNESCO, 2022).

In Ethiopia, creative entrepreneurship has been supported by emerging incubation programs and ecosystem initiatives, including targeted fashion and creative enterprise development models. However, secondary evidence suggests that these initiatives remain limited in scale relative to the size of the sector, and that broader MSME support systems are not consistently adapted to creative enterprises' needs, particularly regarding intangible assets, copyright-based revenue models, and fluctuating income patterns. As a result, many creative enterprises remain undercapitalized and operate below their potential scale, reinforcing the importance of tailored financial products, rights management systems, and market infrastructure investments to enable enterprise growth and job creation (British Council, 2022; UNCTAD, 2024).

6. GOVERNMENT POLICIES, STRATEGIES, AND DIRECTIVES RELEVANT TO CCIS IN ETHIOPIA

This section reviews the policy, legal, and institutional framework relevant to Ethiopia's Cultural and Creative Industries (CCIs) and highlights how these instruments shape sector development and measurement. Secondary evidence shows that Ethiopia's CCIs are characterized by strong cultural vitality and a growing entrepreneurial base; however, their ability to generate higher value-added, sustainable employment, and competitive domestic and export market performance remains strongly influenced by the broader enabling environment. Key determinants include the effectiveness of regulatory systems, access to finance, availability of infrastructure and production facilities, intellectual property rights (IPR) enforcement, market access mechanisms, and institutional coordination (British Council, 2022; UNESCO, 2022; UNCTAD, 2024).

While the existence of policies, strategies, and directives provides an important foundation for governing creative activity and promoting cultural development, the economic valuation of CCIs depends heavily on whether these frameworks are supported by reliable and standardized data systems. Without consistent classification of CCI domains and systematic compilation of enterprise, employment, revenue, and cost information, it remains difficult to quantify the sector's contribution to GDP and employment or to track changes over time. In this regard, city-level initiatives such as the Addis Ababa City Administration's Cultural and Tourism Service Providers Professional Qualification and Standards Guide (Directive No. 95/2014) demonstrate a practical approach for organizing CCI activities and strengthening administrative visibility, which can be adapted and scaled to support national measurement efforts (Addis Ababa City Administration Culture and Tourism Bureau, 2014).

6.1. Policy and Regulatory Environment

Secondary sources indicate that Ethiopia has established policy recognition of culture and creative activity as important to national development, but implementation remains uneven and fragmented. Ethiopia's National Cultural Policy (2017) outlines objectives related to protecting and promoting culture and heritage, improving cultural infrastructure, strengthening human resources, and addressing financing and governance challenges affecting the sector (UNESCO, 2017). UNESCO's policy monitoring platform further notes that the policy seeks to strengthen cultural governance systems and integrate culture into sustainable development frameworks. However, secondary evidence suggests that these ambitions have not yet translated into a comprehensive and coordinated creative economy strategy capable of aligning regulation, investment, skills development, and rights enforcement into a coherent growth pathway. As a result, CCIs are often treated primarily as cultural activities rather than as economic sectors requiring structured enterprise development approaches (UNESCO, 2022; UNCTAD, 2024).

Government Policies, Strategies, and Directives Relevant to CCIs in Ethiopia

Ethiopia has established an important policy and legal foundation that supports the growth and governance of Cultural and Creative Industries (CCIs). The existence of national policies and proclamations on culture, heritage, media, and intellectual property reflects increasing recognition of culture and creativity as strategic assets for national development, identity, and social cohesion (UNESCO, 2017). These instruments provide an enabling environment for creative production, protection of cultural expressions, regulation of creative markets, and institutional coordination. However, maximizing the economic and employment benefits of CCIs requires systematic collation of relevant data across subsectors. Reliable data on CCI enterprises, employment, revenues, costs, and value chains is essential to clearly understand the current status of the sector, support evidence-based planning, guide implementation, and measure changes over time in terms of GDP/value-added contribution, job creation, and informal sector dynamics (Addis Ababa City Administration Culture and Tourism Bureau, 2014).

National Cultural Policy (2017)

Ethiopia's National Cultural Policy (2017) provides a broad framework for the protection and promotion of cultural values, strengthening cultural institutions, and addressing financing and governance issues affecting the sector (UNESCO, 2017). The policy establishes a national commitment to cultural development and highlights the role of culture in national progress. While the policy provides strategic direction, it requires stronger integration with administrative and statistical systems to support the measurement of economic and employment outcomes from CCIs.

Copyright and Neighbouring Rights Protection Proclamation (No. 410/2004)

A major legal instrument relevant to the creative economy is the Copyright and Neighbouring Rights Protection Proclamation No. 410/2004. This proclamation establishes legal protection for literary and artistic works and provides a framework for recognizing rights holders and regulating the use of creative outputs (Federal Democratic Republic of Ethiopia [FDRE], 2004). The proclamation is particularly important for subsectors such as film, music, publishing, and visual arts, where creative works constitute marketable assets. The existence of such legal protection strengthens the enabling environment for creative entrepreneurship, investment, and the development of monetization systems (e.g., licensing and royalties).

Media (Amendment) Proclamation No. 1374/2025

The media sector is a core component of the CCI ecosystem, influencing audiovisual production, broadcasting, publishing, and digital content distribution. Ethiopia's Media (Amendment) Proclamation No. 1374/2025 provides a regulatory framework governing media operations and oversight (FDRE, 2025). This legal instrument is relevant for CCIs because it shapes the environment in which media-based creative content is produced, disseminated, and accessed, with direct implications for market growth, investment confidence, and employment opportunities within media and audiovisual industries.

Proclamation on Research and Conservation of Cultural Heritage (No. 209/2000)

Cultural heritage is a foundational domain within CCIs, particularly in countries with strong historical and cultural assets. Ethiopia's Proclamation No. 209/2000 on Research and Conservation of Cultural Heritage provides legal definitions and protections for cultural heritage, including both tangible and intangible forms (FDRE, 2000). This includes cultural expressions such as traditions, performances, folklore, and other heritage practices that may also have economic value through tourism, cultural services, and creative products. The proclamation therefore supports preservation and governance while also enabling heritage-based economic activity.

Addis Ababa City Administration Directive No. 95/2014 (Professional Qualification and Standards Guide)

At the city level, the Addis Ababa City Administration has issued the Cultural and Tourism Service Providers Professional Qualification and Standards Guide (Directive No. 95/2014). This directive establishes structured professional categories and standards for cultural and tourism service providers and serves as a practical administrative mechanism for identifying and organizing creative professions and enterprises (Addis Ababa City Administration, 2014). This is a critical development for CCIs because classification and professional standards help improve the visibility of creative activities and create pathways for compiling enterprise registries and workforce data needed for sector valuation.

6.2. Implications for Economic Valuation of CCIs in Ethiopia

The reviewed policies and directives demonstrate that Ethiopia has taken meaningful steps toward supporting and regulating cultural and creative activities. However, the economic valuation of CCIs requires more than an enabling legal environment; it requires the ability to systematically identify, classify, and measure creative enterprises and workers across domains and subdomains. While the National Cultural Policy provides strategic direction, it does not on its own establish a nationally harmonized classification system that can be directly integrated into national accounts and labor market statistics (UNESCO, 2017). Without standardized CCI domains and subdomains, creative enterprises may be registered under broader economic categories such as trade or general services, limiting the ability to isolate sector-specific output and value-added.

Similarly, copyright legislation is essential for protecting creative works and supporting monetization, but it does not automatically generate comprehensive administrative datasets required for valuation unless enforcement and rights-management systems are linked to reporting mechanisms (Federal Democratic Republic of Ethiopia, 2024). Media regulation influences the structure and functioning of creative content industries, yet the contribution of film, broadcasting, and digital content remains difficult to quantify without consistent enterprise-level reporting on revenue, costs, and employment (Federal Democratic Republic of Ethiopia, 2025). Heritage proclamations support protection and governance of cultural assets, but heritage-related economic activities often overlap with tourism and public service functions, which complicates attribution of value-added and employment to CCIs unless clear classification and reporting mechanisms exist (Federal Democratic Republic of Ethiopia, 2000).

In this context, city administration-level initiatives such as Addis Ababa's professional qualification and standards directive represent a promising model for strengthening CCI measurement. By defining professional categories and activity areas, the directive provides an administrative entry point for compiling data on enterprises, employment, and business performance indicators that are essential for economic valuation (Addis Ababa City Administration Culture and Tourism Bureau, 2014). If such initiatives are adopted and harmonized across regional states and city administrations, Ethiopia would be better positioned to generate reliable estimates of CCI contribution to GDP and employment, including formal and informal segments, and to track sector growth and policy impact over time.

7. CONSTRAINTS AND ENABLERS OF SECTOR GROWTH

This section synthesizes evidence from the literature review and study findings to examine the main constraints limiting growth, productivity, and value capture in Ethiopia's Cultural and Creative Industries, as well as the key enablers that can strengthen sector performance. The review highlights that barriers to growth are often interconnected—financing gaps, infrastructure shortages, weak market access, limited enforcement of intellectual property rights, and institutional capacity constraints frequently reinforce one another, limiting enterprise sustainability and reducing employment potential. At the same time, the evidence points to clear opportunities for accelerating sector development through improved financing mechanisms, stronger data and classification systems, supportive regulation, and targeted investments that enable creative enterprises—particularly youth- and women-led actors—to expand, professionalize, and compete in domestic and international markets (UNESCO, 2022; UNCTAD, 2024).

7.1. Financing and Investment Constraints

Financing constraints emerge consistently across secondary sources as one of the most binding barriers to growth in Ethiopia's CCIs. Creative enterprises are predominantly micro and small businesses and frequently operate with limited working capital, low asset bases, and weak collateral—conditions that restrict access to formal credit. Because much creative value is embodied in intangible assets such as skills, reputation, and intellectual property, conventional collateral-based lending systems are poorly suited to creative entrepreneurship. UNCTAD and UNESCO emphasize that the creative economy's growth depends on financing instruments that recognize intangible value, support early-stage enterprise development, and enable investment in production technologies and market access systems (UNCTAD, 2024; UNESCO, 2022).

This challenge is reinforced by the absence of strong government-backed financing mechanisms and collateral-free models tailored to the realities of micro-enterprises and youth-led businesses. As noted in UNESCO's global evidence, limited access to credit and the lack of suitable financing products disproportionately affect youth and small creative enterprises, restricting their ability to invest, scale, and formalize (UNESCO, 2022).

Qualitative findings reinforce these financing-related constraints, particularly from business owners and employees who highlighted the difficulty of sustaining production under rising costs and unstable cash flow.

> *Inflation and the rising cost of materials have made creative production increasingly expensive. When payments are delayed and there is no adjustment for value-added tax, the profit becomes too small to justify the effort."*
>
> *(Employee respondent, 2025)*

Ethiopia-specific ecosystem mapping reinforces this constraint, documenting that many creative practitioners rely on self-financing, informal borrowing, and irregular project-based funding rather than structured investment. This underinvestment limits productivity, reduces the ability to upgrade equipment and production quality, and prevents enterprises from scaling beyond small informal operations. Financing challenges are particularly acute for youth- and women-led enterprises that face additional barriers in access to assets, networks, and institutional support. The evidence therefore suggests that without tailored financing models—such as micro-grants, blended finance, revenue-based financing, and formal investment vehicles designed for CCIs—many subsectors will remain trapped in low-scale and low-productivity pathways despite strong market demand and cultural vitality (British Council, 2022; UNCTAD, 2024).

From the perspective of enterprise owners, limited financing was directly linked to restricted growth opportunities.

> *If access to finance were easier and more supportive for creative enterprises, we could implement many more projects, invest in better production, and build a stronger presence in international markets."*
>
> *(Business owner respondent, 2025)*

7.2. Infrastructure and Facilities (Venues, Studios, Technology, Distribution)

Infrastructure gaps significantly constrain creative production and monetization in Ethiopia. CCIs require specialized spaces and facilities, including performance venues, studios, rehearsal spaces, exhibition areas, production workshops, post-production facilities, and affordable access to digital tools and technologies. The British Council mapping of Ethiopia's creative ecosystems highlights the importance of both physical and virtual spaces for creative production, and it documents the uneven distribution of such spaces across urban and regional contexts. Limited access to quality venues and studios reduces production output, constrains professionalization, and limits the ability of enterprises to meet market demand—particularly in high-growth subsectors such as audiovisual production, music production, and digital content creation.

Additional sector evidence also highlights that inadequate infrastructure—particularly affordable production spaces, post-production facilities, and structured distribution channels—limits productivity and competitiveness across multiple creative domains (Selam Ethiopia, 2025).

The qualitative findings strongly align with this evidence, as both employees and business owners repeatedly raised the lack of affordable and suitable workspaces as a major constraint on productivity and quality.

> *Access to affordable working spaces and studios is a major challenge. Government-supported workspaces or studios would reduce operating costs and improve our ability to produce consistently."*
>
> *(Employee respondent, 2025)*

Distribution infrastructure is another core constraint. Many creative goods and services face weak distribution channels, limited formal retail outlets, high logistics costs, and market concentration in major urban centers. These constraints reduce the ability of creators and enterprises to reach national markets, let alone export markets. In sectors such as publishing, music, and audiovisual content, distribution systems are also shaped by weak rights enforcement and piracy, which further reduces returns on investment and discourages expansion. UNESCO's global evidence highlights that infrastructure—including production facilities and distribution systems—is a major determinant of whether creative sectors can translate cultural production into sustainable value added and employment (UNESCO, 2022).

Business owners similarly emphasized the importance of physical infrastructure as a practical requirement for improving output and competitiveness.

> *We need a wider and more standard workplace, along with training space, so that we can improve the quality of our products and increase output."*
>
> *(Business owner respondent, 2025)*

7.3. Intellectual Property Rights and Enforcement

Weak intellectual property protection and enforcement is widely documented as a major barrier to creative sector growth, particularly in copyright-dependent industries such as music, audiovisual production, publishing, broadcasting, and digital content. Ethiopia's copyright and neighboring rights framework is anchored in legal proclamations and amendments, including the Copyright and Neighboring Rights Protection laws administered through the national intellectual property authority system. Secondary sources confirm that Ethiopia has established key copyright instruments, including the Copyright and Neighboring Rights Protection Proclamation No. 410/2004 and its amendments, as well as institutional arrangements under the Ethiopian Intellectual Property Authority (EIPA).

However, secondary evidence also indicates that enforcement remains limited and that creators frequently experience piracy, unauthorized copying, and uncompensated use of creative works. This reduces monetization and weakens incentives for investment in production quality and professionalization. International evidence is clear that copyright-based industries depend on predictable rights protection systems and that weak enforcement produces economic leakage and under-monetization, particularly harming small and informal creators who lack bargaining power and legal resources (WIPO, 2015).

Institutional strengthening efforts have been noted in secondary sources. For example, the U.S. International Trade Administration reports that in November 2021 Ethiopia upgraded the former intellectual property office to the Ethiopian Intellectual Property Authority to strengthen enforcement capacity and included a mandate to establish an Intellectual Property Tribunal to arbitrate disputes and appeals. These reforms suggest a pathway toward stronger enforcement, but the evidence indicates that implementation capacity, awareness, and accessibility of enforcement mechanisms remain key determinants of whether creators experience meaningful rights protection in practice.

7.4. Market Access (Domestic, Regional, Digital Marketplaces)

Market access constraints are repeatedly identified in secondary evidence as limiting creative enterprise growth and reducing value capture. Domestically, market demand is often concentrated in major cities, and access to distribution channels is shaped by limited retail networks, weak intermediary systems, and uneven purchasing power. Many creative enterprises rely on informal markets, episodic events, and social networks for sales rather than structured market platforms. This affects predictability of income and prevents enterprises from building stable market positions.

Qualitative findings confirm that creatives experience major challenges in visibility, promotion, and buyer linkage.

> *To increase my income, I need stronger social media influence and better network connections. However, due to financial constraints, I cannot afford the promotion and outreach required to reach customers."*
>
> *(Employee respondent, 2025)*

Regional and international market access remains underdeveloped for many subsectors despite export potential. UNCTAD's global evidence indicates that creative goods and services can represent important export opportunities, especially where countries invest in branding, quality improvement, and export facilitation mechanisms (UNCTAD, 2024). For Ethiopia, secondary evidence suggests that export-oriented creative subsectors such as fashion, crafts, and design have potential but face barriers such as limited export logistics systems, quality standards constraints, weak marketing capacity, and limited participation in regional and global trade networks.

Digital marketplaces represent a major potential enabler, particularly for youth-driven creative entrepreneurship and creative services. Digital platforms can reduce geographic barriers and provide access to international clients and audiences. They also offer a strategic pathway for Ethiopia to reach diaspora markets, which often have stronger purchasing power and sustained demand for Ethiopian cultural content and creative products. Diaspora audiences can support the growth of Ethiopian music, film, design, crafts, and cultural services by expanding consumer markets, strengthening global visibility, and creating opportunities for creative exports and foreign currency earnings. Beyond consumption, diaspora networks may also play roles as promoters, distributors, investors, and cultural intermediaries, facilitating market access through international events, screenings, festivals, retail linkages, and online communities.

However, secondary evidence indicates that digital monetization remains constrained by gaps in digital payments infrastructure, platform revenue concentration, limited digital literacy, and intellectual property concerns. UNESCO emphasizes that policies supporting digital creativity must ensure equitable access, fair remuneration mechanisms, and strong rights protection to enable creators to benefit meaningfully from platform-based markets (UNESCO, 2022). Strengthening digital payment integration and rights enforcement is therefore essential for enabling Ethiopian creatives to translate diaspora demand into sustainable income and employment growth, particularly in copyright-dependent sectors such as music and film (WIPO, 2015).

7.5. Governance and Institutional Capacity

Institutional fragmentation and capacity constraints reduce the effectiveness of support systems for CCIs. CCIs intersect with multiple institutional mandates, including culture and heritage governance, trade and investment agencies, labor and social affairs systems, education and training institutions, and city administrations. UNESCO's policy monitoring platform highlights the multi-institutional nature of cultural policy governance in Ethiopia, involving multiple ministries and regional bureaus. However, in practice, coordination challenges often reduce strategic alignment and prevent the development of integrated support systems.

Institutional capacity constraints also affect data systems. The absence of consistent cultural statistics and creative economy satellite accounts limits evidence-based policymaking and reduces the ability of institutions to track performance, employment, and value added trends. UNCTAD emphasizes that improving measurement systems is a foundational requirement for effective creative economy policy because it enables investment prioritization, monitoring, and accountability (UNCTAD, 2024).

In addition, the lack of a national standard classification system and institutionalized cultural datasets has been identified as a central barrier to both sector development and economic valuation. Without standardized classifications and consistent data collection systems, it becomes difficult to measure sector performance, compare trends over time, or design targeted policy interventions. International evidence also confirms that inconsistent classification and weak statistical systems constrain evidence-based policymaking and limit the visibility of CCIs in national accounts and labor statistics (DCMS, 2016; UNESCO, 2019).

Institutional qualitative findings strongly validate these constraints.

> *Our office has limited budget and low institutional capacity. We also lack standard definitions for CCI domains and there is weak coordination with other institutions. Because of these combined challenges, we cannot collect or regularly update reliable CCI data."*
>
> *(Official/Expert respondent, 2025)*

Where institutional capacity is weak, support interventions tend to be ad hoc, fragmented, or limited to small-scale projects rather than systematic national programs.

7.6. Gender- and Youth-Specific Constraints

Youth are highly represented across creative subsectors, but face constraints in converting participation into stable and dignified livelihoods. The UNCTAD workshop concept note on Ethiopia's creative economy highlights that Ethiopia's creative scene is concentrated in Addis Ababa and that many creative workers, particularly youth, lack formal education, skills, resources, and opportunities to grow. Youth face limited access to finance, weak mentorship systems, and restricted access to production infrastructure, while also experiencing market insecurity due to irregular contracts and weak rights protection.

Women face additional and often intersecting constraints. In many creative subsectors, women's participation is constrained by unequal access to finance and assets, weaker access to market networks, social norms affecting mobility and participation in night-time economies, and safety concerns in some creative spaces. UNESCO's global evidence emphasizes that gender inequality in cultural employment is not only a participation issue but also a structural issue related to representation in leadership, access to funding, and access to professional opportunities and distribution systems (UNESCO, 2022). These constraints imply that enabling policies must be gender- and youth-responsive, integrating targeted financing, safe infrastructure, mentorship, and institutional support mechanisms that address structural exclusion.

Qualitative responses from employees reinforce the reality that many creatives cannot dedicate full time to their profession because income is unstable.

Because income from creative work is not stable, I spend much of my time trying other businesses to survive. This reduces the time I can dedicate to my creative profession."

(Employee respondent, 2025)

At the same time, youth-led entrepreneurship remains one of the most important opportunities for inclusive employment and self-employment pathways, especially when enabling systems are strengthened to support enterprise growth and sustainability (UNESCO, 2022).

7.7. Enablers and High-Potential Growth Opportunities

Despite the above constraints, secondary evidence identifies several enablers and high-potential growth opportunities that could accelerate the contribution of CCIs to GDP, employment, and inclusive development. First, Ethiopia's cultural heritage and creative diversity represent strong comparative assets that can be leveraged for tourism-linked creative value chains, destination development, and cultural branding. In particular, leveraging Ethiopia's UNESCO-listed heritage sites presents opportunities to accelerate local economic development through cultural tourism, crafts, and heritage-linked services (UNESCO, 2017).

Qualitative findings from business owners indicate that tourism recovery and stability are seen as critical enabling conditions for market revival, especially in handicrafts and heritage-linked subsectors.

Tourists have decreased significantly since COVID, and without peace and stability in the country it is very difficult to attract buyers. When visitors do not come, our sales drop and maintaining income becomes extremely difficult."

(Business owner respondent, 2025)

Second, digital creativity represents a high-growth frontier. With expanding mobile connectivity and social media usage, subsectors linked to digital content creation, design services, online marketing, and platform-based creative enterprise models have strong potential to scale rapidly, especially among youth. Digital and diaspora markets also offer export opportunities in creative services, music, and film—provided that payment systems, platform monetization mechanisms, and rights enforcement are strengthened (WIPO, 2015).

Third, the growth of creative hubs, incubators, and ecosystem initiatives provides a platform for upgrading creative enterprise capacities. UNIDO's Creative Industries Programme, including Creative Hub Ethiopia launched in 2021, reflects an emerging ecosystem investment model focused on youth and women and aimed at strengthening entrepreneurship and linking local heritage to broader markets.

Fourth, strengthening intellectual property enforcement and rights management systems is a key enabler for monetization and investment. Recent institutional reforms toward strengthening IP governance (including upgrading to EIPA and establishing mechanisms such as an IP tribunal mandate) suggest a pathway for improving the enabling environment for copyright-based industries and digital creative markets. Finally, the existence of cultural policy frameworks that recognize the role of culture in development provides an entry point for expanding policy coherence and investment prioritization. When combined with improved cultural statistics, structured financing mechanisms, and infrastructure investments, these enablers provide a credible basis for growth scenarios in which CCIs generate higher value added, better jobs, and stronger exports (UNCTAD, 2024; UNESCO, 2022; WIPO, 2015).

Institutional respondents also stressed that sector support can unlock foreign currency earnings and youth employment if CCIs receive stronger recognition and facilitation.

"Developing clear policies and programs, strengthening coordination, providing capacity building for practitioners, and creating awareness among policymakers are essential. Special interventions are also needed within existing policies to better support and coordinate the industry." *(Official/Expert respondent, 2025)*

Finally, the growing global policy momentum around the economic value of CCIs provides a timely opportunity for Ethiopia to institutionalize measurement systems, strengthen governance structures, and position CCIs as part of inclusive growth, employment creation, and innovation policy agendas (UNCTAD, 2024).

8. MULTIPLIER EFFECTS, LINKAGES, AND INNOVATION SPILLOVERS

8.1. Inter-sectoral Linkages (Tourism, ICT, Hospitality, Education, Retail, Manufacturing)

This section presents a structured linkage pathway analysis rather than a formally estimated input-output multiplier model. Due to the absence of disaggregated creative economy input-output tables and national creative satellite accounts, the study does not compute econometric multiplier coefficients. Instead, it identifies and interprets key transmission channels through which Cultural and Creative Industries (CCIs) interact with and stimulate other sectors of the economy. These effects should therefore be understood as analytically informed and directionally indicative, rather than as quantified indirect or induced multipliers.

Economic significance of CCIs extends beyond their direct contribution to GDP and employment because creative industries generate strong backward and forward linkages with other sectors. Globally, UNCTAD emphasizes that creative industries stimulate demand across multiple parts of the economy through value chain interdependencies, including retail trade, advertising, ICT services, tourism and hospitality, transport, education, and light manufacturing (UNCTAD, 2024). These linkages are particularly important in contexts such as Ethiopia where CCIs are deeply integrated into services economies and urban informal markets.

In the Ethiopian context, cultural heritage and cultural expressions form a major linkage pathway through tourism. Ethiopia's tourism sector is heavily anchored in cultural, historical, and heritage assets, which create demand for cultural products and services and generate indirect employment in hospitality, transport, and retail markets. The World Bank has highlighted ongoing efforts to map Ethiopia's tourism assets—particularly attractions, cultural and historical sites—as part of a strategy to mobilize investments and strengthen integrated destination management. This approach indicates a recognition that cultural assets and creative experiences constitute economic resources that can stimulate growth through value chain development and private capital mobilization. The linkage between CCIs and tourism is reinforced by the 2024 launch of Ethiopia's Tourism Satellite Account, which reflects institutional movement toward better measuring and strengthening tourism's contribution to the economy—a contribution that is partially driven by cultural heritage, cultural services, and creative experiences.

Creative industries also maintain strong linkages with the ICT ecosystem. UNESCO's global evidence shows that digitalization has become a central force shaping CCIs by enabling new modes of creation, distribution, and market access, while also generating new demand for ICT infrastructure, digital services, and platform-based business models (UNESCO, 2022). In Ethiopia, this linkage is reflected in the expanding digital content creation ecosystem, including digital media production, social media-based creator economies, online marketing, and emerging streaming and platform-based distribution models. These dynamics strengthen the role of CCIs as drivers of innovation in digital markets, while also increasing the sector's dependence on reliable connectivity, affordable data, digital payment systems, and regulatory frameworks that enable monetization and rights protection.

Finally, CCIs generate linkages with education and skills development systems, particularly through training institutions, vocational programs, private academies, and informal apprenticeship systems that support creative skills development. UNCTAD notes that creative economies require skills ecosystems that combine technical creative skills with entrepreneurship and digital competencies, and that investment in human capital is essential for scaling creative sector productivity and innovation.

8.2. Indicative Transmission Channels (Secondary Evidence)

In contexts where comprehensive input-output tables and cultural satellite accounts exist, formal multiplier analysis can be used to estimate indirect and induced impacts of CCIs. However, such modeling is not currently feasible in Ethiopia due to classification and data constraints. Accordingly, this study does not compute multiplier coefficients but instead identifies plausible transmission pathways based on secondary evidence and sectoral structure. This is primarily due to the same structural constraints discussed earlier: CCIs are not consistently separated in national accounts, creative subsectors are distributed across multiple classifications, and informal transactions dominate in several creative value chains.

Nevertheless, secondary evidence supports the conclusion that multiplier effects are likely significant. UNCTAD's Creative Economy Outlook 2024 highlights that CCIs generate economic impacts beyond the sector by stimulating demand for intermediate inputs, creating jobs in linked sectors, and increasing consumption through wages and profits generated in creative markets. These multiplier effects are particularly pronounced where CCIs are integrated into tourism, hospitality, digital services, and manufacturing value chains such as textiles and printing. Similarly, WIPO's work on copyright-based industries highlights that copyright industries generate both direct and indirect contributions to economic performance, including through linkages with advertising, retail distribution, manufacturing of inputs, and service sectors that support creative production and dissemination.

For Ethiopia, the most defensible secondary conclusion is that linkage and transmission effects are likely strongest in four areas. First, cultural tourism value chains generate indirect value through accommodation, transport, food services, guiding services, cultural markets, and event economies. Second, urban entertainment and live events stimulate demand in hospitality, advertising, security, venue services, logistics, and transport. Third, crafts and fashion link to textiles, leather, local materials, retail trade, and export channels where developed. Fourth, digital content production and creative services link to ICT services, device markets, digital marketing, and emerging monetization systems. While the study did not rely on secondary multiplier coefficients to quantify these effects, the evidence base strongly supports their existence and policy significance (UNCTAD, 2024; UNESCO, 2022).

8.3. Innovation, Digital Platforms, and New Business Models

Innovation in CCIs increasingly occurs through digital platforms, new distribution technologies, and hybrid monetization models. UNESCO reports that digital creativity has expanded rapidly, shaping cultural production and distribution while enabling new markets for creators and enterprises. Digital transformation has strengthened opportunities for creators to reach audiences and clients beyond their immediate geographic location, including through streaming, social media platforms, online marketplaces, and remote creative service provision. UNCTAD similarly emphasizes that creative services and digital creative markets represent a major growth frontier, with countries increasingly recognizing the economic potential of digital creative industries and platform-based business models.

In Ethiopia, this global trend suggests that digital platforms have become a critical enabler of innovation, particularly for youth-driven creative entrepreneurship. Emerging business models include influencer-driven marketing, content creation for brand promotion, digital design services, online music distribution, social media monetization, and online marketplaces for creative goods. However, the secondary evidence also highlights that digital innovation does not automatically translate into economic value capture. Weak intellectual property enforcement, limited access to digital payment systems, platform revenue concentration, and gaps in digital literacy can limit the ability of creators to monetize and scale production. UNESCO's analysis underscores that policies supporting digital creativity and equitable market access are essential to ensure that creators benefit from digital transformation rather than being marginalized within platform economies.

8.4. CCIs as Drivers of Local Economic Development

Secondary evidence supports the conclusion that CCIs function as drivers of local economic development through clustering, place-based identity, urban regeneration, and small business growth. Creative industries often form geographic clusters where production networks, markets, and skills ecosystems concentrate. These clusters stimulate local demand and create employment not only in creative production but also in associated services. UNCTAD notes that creative economy development is often linked to urban development strategies and that creative clusters can generate economic vibrancy, attract investment, and strengthen local entrepreneurship ecosystems.

In Ethiopia, cultural and creative clusters are particularly visible in major cities where audiences, infrastructure, and distribution channels are concentrated. These clusters support local economies through performance venues, cultural markets, festivals, fashion districts, media production sites, and creative service hubs. At the same time, heritage-linked cultural economies can also support rural and regional local development through tourism value chains and cultural markets, especially where cultural sites and cultural festivals attract visitors and stimulate demand for crafts, hospitality, and transport services. The World Bank's integrated destination management approach highlights that unlocking tourism-driven local development requires linking attractions, cultural assets, and experiences to infrastructure investment, firm-level support, and private capital mobilization—conditions that directly connect CCIs to local growth pathways.

8.5. CCIs and Social Value (Community Cohesion, Identity, Social Inclusion)

Evidence consistently highlights that CCIs generate significant non-monetary social value, which complements their economic contribution and strengthens their development relevance. UNESCO positions culture as a global public good and emphasizes that cultural and creative industries contribute to social cohesion, identity formation, civic participation, and democratic engagement. These social values are particularly important in diverse societies because cultural expressions help strengthen shared narratives, support intercultural dialogue, and reinforce community belonging.

In Ethiopia, cultural production is deeply embedded in social life, including ceremonies, community events, religious and cultural festivals, and local artistic traditions. While these cultural expressions may not always be monetized within formal markets, they generate intangible benefits such as community cohesion, intergenerational knowledge transfer, cultural continuity, and local identity reinforcement. Secondary evidence therefore supports the argument that policy and investment frameworks for CCIs should not focus solely on GDP and employment metrics; they should also recognize the sector's role in strengthening social inclusion and national identity, which in turn can create enabling conditions for sustainable economic development. This reinforces UNESCO's broader framework that culture contributes simultaneously to economic outcomes and to broader societal well-being.

9. CASE PROFILE [3]

This case profile illustrates why categorization, coding, and systematic data collection are critical building blocks for measuring the economic and employment contribution of Ethiopia's Cultural and Creative Industries (CCIs). While CCIs are widely recognized as drivers of economic growth, job creation, innovation, and social cohesion, Ethiopia continues to face major challenges in producing credible national estimates of CCI contribution to GDP/value-added, employment, and informal livelihoods. One of the most binding constraints is the absence of a fully classified and nationally harmonized framework of CCI domains and subdomains that can be consistently applied across federal institutions, regional bureaus, city administrations, and national statistical systems. Without such a shared classification structure, CCIs remain treated as fragmented activities rather than a coherent economic sector, limiting the ability to register enterprises consistently, measure employment reliably, and track performance over time.

A practical example of progress is demonstrated by the Addis Ababa City Administration, Culture and Tourism Bureau, which has introduced a structured certification system through its professional qualification and standards directive. This directive provides a formal framework for issuing certificates of qualification across a wide range of culture- and creativity-related professions and business activities, including film and audiovisual services, theatre production and exhibition, music bands and recording studios, visual arts and promotion, libraries and archives, cultural centers, cultural consultancy services, handicrafts and gift articles, and other entertainment and promotion services (Addis Ababa City Administration, 2014). This initiative shows that a city-level administrative system can effectively identify and organize creative occupations and enterprises through a structured classification and coding approach. Importantly, such systems do not only support certification and regulation—they also create a foundation for compiling enterprise-level information that is essential for economic valuation and labor market measurement.

In addition to the Addis Ababa initiative, academic work has also demonstrated the feasibility and importance of establishing detailed classification systems for cultural industries in Ethiopia. For example, Dr. Bayleyegn's classification framework identifies approximately 179 cultural industry subdomain categories, providing a more detailed mapping of creative activity types that can support standardized coding, enterprise profiling, and national-level measurement of the sector (Bayleyegn, 2016). This type of expanded subdomain classification is particularly important because it improves the visibility of creative activities that are often hidden within broader economic categories, and it strengthens the foundation for building datasets that can support estimation of CCI contribution to GDP, employment, and informal sector livelihoods.

Despite these promising initiatives, national measurement of CCIs remains constrained because Ethiopia still lacks a fully structured and harmonized classification system that clearly defines CCI domains and subdomains in a way that supports statistical reporting and economic accounting. This results in several practical challenges. First, it becomes difficult to estimate GDP and value-added contributions because many CCI businesses are registered under broad categories such as "trade," "services," or "entertainment," making it impossible to isolate CCI-specific output. Second, employment measurement remains inconsistent because CCI labor markets are highly diverse, including formal workers, freelancers, informal operators, and project-based workers. Without clear subdomain classification, employment cannot be counted consistently across subsectors

3. CASE PROFILE: Classification, Coding, and Data Systems as Foundations for CCI Economic Valuation

such as film, music, theatre, visual arts, and cultural promotion. Third, administrative datasets collected for licensing, certification, taxation, and regulation cannot be easily merged across institutions, resulting in fragmented enterprise records and weak national-level evidence. Finally, incomplete classification weakens the visibility of informal creative activity, which constitutes a significant share of the sector but remains outside official systems, limiting the ability to design policies that support formalization, financing access, and social protection.

At the same time, encouraging progress is emerging at the federal level. A Ministry of Culture and Sports expert interviewed during this study emphasized that the Ministry is fully aware of the importance of establishing clear categorization and coding systems and maintaining structured CCI datasets. The expert further noted that the Ministry has already begun undertaking CCI data collection efforts, reflecting growing institutional recognition that reliable CCI measurement requires standardized classification and routine data systems. This signals a positive shift toward building the foundations needed for stronger national valuation and evidence-based planning for the sector.

Overall, this case profile highlights that the main challenge is not the absence of creative activity, but the absence of a nationally harmonized classification and data system that allows CCIs to be measured as an economic sector. Strengthening categorization, coding, and enterprise-level reporting—building on city-level initiatives such as Addis Ababa's directive, incorporating detailed subdomain frameworks such as Bayleyegn's work, and scaling similar practices across regional states and city administrations—would enable Ethiopia to develop a national CCI enterprise registry, produce disaggregated employment statistics, strengthen measurement of informal activity, and generate credible GDP/value-added estimates. These steps are foundational for evidence-based policy, monitoring sector growth, and unlocking the full economic potential of Ethiopia's cultural and creative industries.

10. CONCLUSIONS AND RECOMMENDATIONS

10.1. Conclusions

The findings of this study provide the first comprehensive, evidence-based assessment of the economic weight and structural dynamics of Ethiopia's Cultural and Creative Industries. By triangulating secondary administrative data, global benchmarks, and local proxy estimates, several detailed conclusions can be drawn:

A Macroeconomic Powerhouse in the "Shadow"

The study confirms that the CCIs are not merely a social or cultural asset but a primary pillar of the Ethiopian service economy. With a proxy GDP contribution estimated at 4.73% (based on WIPO copyright industries data), the creative sector's economic weight rivals, and in some cases exceeds, traditional sectors such as hospitality and retail. However, this contribution remains largely "invisible" in official national accounts. The current study's documentation of ETB 1.33 billion in current capital across a subset of Addis Ababa firms alone signals that the creative sector is a capital-intensive industry capable of driving significant value-added growth if properly integrated into national macroeconomic planning.

The "Hub and Spoke" Labor Market

The labor market analysis reveals a distinct geographic and sectoral "Hub and Spoke" model. Addis Ababa serves as the primary hub, housing 84.8% of the documented workforce and nearly all modern creative services like Design and Audio-visual Media. In contrast, the Regional States act as the vital "spokes" for labor-intensive, tradition-based sectors. The finding that Amhara leads the nation in Cultural and Natural Heritage employment (over 53% of that domain's total) proves that regional creative economies are anchored in localized cultural assets and historical resources rather than urban market centralization alone.

Informality as a Structural Component

A central conclusion of this study is that informality is not a marginal "problem" to be eliminated, but a structural characteristic of how creative work is organized in Ethiopia. While the capital city shows a formalization rate of 72.6%, the data reveals a sharp "Sectoral Divide." Professional services like Design are highly formalized (89.2%), while the Performance and Celebration domain—which provides the highest volume of employment—is nearly 76% unlicensed. This indicates that the most culturally vibrant parts of the economy are currently excluded from formal credit markets, social protections, and government support systems.

Digitalization as the Growth Catalyst

The data identifies Audio-visual and Interactive Media as the most dynamic engine of the creative economy. Accounting for over 61% of the recorded current capital in the Addis Ababa subset and showing the strongest profit growth in the 2012–2014 series, this domain is the primary frontier for youth-led innovation. The rapid expansion of this sector, even in the face of weak intellectual property enforcement, suggests that digital content creation is the most potent pathway for Ethiopia to transition toward a high-productivity, export-oriented creative economy.

The Institutional Visibility Gap

Perhaps the most significant conclusion is the presence of a "Visibility Gap" between cultural activity and administrative recording. The stark difference between the high density of institutions in Addis Ababa (92%) versus the regions suggests that regional creative output is significantly under-counted rather than non-existent. Without a harmonized national mapping system and a Cultural Satellite Account, the true scale of Ethiopia's creative wealth—particularly in the Oromia, Sidama, and Southwest regions—will continue to be underestimated, leading to suboptimal resource allocation.

A High-Employment Sector with Uneven Job Quality

Beyond job numbers, the study highlights that CCIs operate as a high-employment sector with uneven job quality and limited institutional protection. Employment in many subsectors is shaped by project-based engagement, informal contracting, and limited access to written agreements and employment-related benefits. This reinforces the conclusion that the employment contribution of CCIs should not be interpreted only in terms of job counts, but also in terms of income stability, contract security, and the sustainability of creative livelihoods over time.

The Measurement Constraint is Institutional, Not Technical

The study shows that Ethiopia's limited ability to measure the GDP and employment contribution of CCIs is not due to the absence of creative activity, but due to weak institutional systems for classification, coding, and routine data production. Fragmented mandates, inconsistent reporting mechanisms, and the absence of standardized datasets prevent creative activities from being systematically captured within national economic and labor statistics.

More importantly, the constraint is structural rather than technical. Sustained public and private investment in CCIs requires credible, regularly produced, and nationally harmonized statistical evidence. Without an institutionalized measurement architecture—such as a harmonized classification framework, coordinated administrative registries, and a Cultural Satellite Account—the creative economy will continue to remain partially invisible in macroeconomic planning and fiscal prioritization. The absence of consistent measurement therefore limits not only valuation accuracy, but also long-term sectoral integration into Ethiopia's national development strategy.

Formalization is Constrained by Administrative Design

The study further concludes that informality persists not only because of compliance behavior, but because the administrative systems available for licensing, registration, and taxation are not fully aligned with the operating realities of creative enterprises. Many CCI activities function through seasonal production, short-term engagement, and network-based contracting. As a result, formalization requires not only enforcement, but simplified and flexible administrative models that support gradual transition into formality without excluding micro-enterprises and youth-led operators.

Diaspora and Digital Markets as Underutilized Growth Channels

The study identifies diaspora-linked demand and digital market channels as a major opportunity for expanding creative exports and strengthening monetization. Ethiopian diaspora communities represent an important market for music, film, cultural products, fashion, and digital content, and they also serve as channels for international exposure, partnerships, and investment. However, this opportunity remains under-utilized due to weak distribution systems, limited digital payment infrastructure, and insufficient rights protection mechanisms that reduce creators' ability to earn sustainable returns from diaspora and global audiences.

A Strategic Economic Frontier

The study shows that Ethiopia's CCIs represent an untapped economic frontier. The sector is uniquely labor-intensive, youth-led, and increasingly capital-rich. However, it is currently constrained by a fragmented institutional landscape and an outdated regulatory environment. The transition from a vibrant cultural scene to a robust, formal creative industry is no longer a matter of creative talent, but a matter of institutional will. By addressing the binding constraints of financing, rights management, and data institutionalization, Ethiopia can leverage its immense cultural endowments to drive inclusive, digitally-enabled national growth.

Taken together, the findings of this study underscore that Ethiopia's creative economy challenge is not one of cultural scarcity, but one of statistical architecture and institutional coordination. This report represents a structured baseline effort to synthesize available evidence, apply proxy-based valuation, and organize fragmented data into a coherent economic narrative. However, sustainable sector growth will depend on transitioning from one-off analytical exercises to an institutionalized system of regular measurement. Building a harmonized classification framework, strengthening administrative registries across regions, and establishing a Cultural Satellite Account are not merely technical upgrades—they are foundational investments in economic governance. Embedding CCIs within Ethiopia's national statistical and planning systems will be essential for attracting sustained investment, improving policy design, and unlocking the sector's full macroeconomic potential over time.

10.2. Policy Recommendations and Implementation Roadmap

To unlock the full economic potential of Ethiopia's Cultural and Creative Industries (CCIs), the following prioritized and sequenced actions are proposed. The recommendations distinguish between immediate operational actions, medium-term institutional strengthening, and longer-term structural reforms, while identifying responsible institutions and implementation sequencing.

I. Immediate Actions (0–2 Years): Foundation and System Alignment

These actions are administratively feasible within existing mandates and establish the institutional foundation for long-term measurement and sector growth.

1. Harmonize Mapping and Classification Frameworks

Lead Institutions: Ministry of Culture and Sport (MoCS), Ministry of Trade and Regional Integration (MoTRI), Ethiopian Statistics Service (ESS)

Currently, the mapping of the creative sector in Ethiopia is characterized by fragmented efforts across different ministries, city administrations, and development partners.

Recommendation: The Ministry of Culture and Sport, in collaboration with the Ministry of Trade and Regional Integration, should lead a national initiative to finalize and harmonize CCI mapping and classification. This effort should move away from isolated pilot projects and toward a unified national database that uses a standardized classification system aligned with international standards (e.g., UNESCO Framework for Cultural Statistics (2009)). This will ensure that creative activities are recorded consistently across all government agencies.

2. Scale the Addis Ababa Data Initiative

Lead Institutions: MoCS in collaboration with Regional Culture Bureaus and City Administrations

The Addis Ababa City Administration has demonstrated significant progress in collecting, organizing, and licensing CCI data (as evidenced by the high formalization and institutional density documented in this report).

Recommendation: Strengthen the ongoing data collection and organization initiative within the Addis Ababa City Administration and use it as a blueprint for national expansion. The Ministry of Culture and Sport should facilitate the scaling of this model to other regional states and city administrations. By replicating the Addis Ababa approach to sectoral registries, regional governments can bridge the data gap and foster more organized creative hubs in cities like Bahir Dar, Adama, Hawassa, and Dire Dawa.

3. Develop a Strategic Advocacy and Communication Plan

Lead Institutions: MoCS, CCI Associations, Development Partners

The findings of this study provide a wealth of "hard data" that can be used to influence policy and investment. However, data alone is insufficient without a targeted communication plan.

Recommendation: Develop a Strategic Advocacy and Communication Plan to disseminate the study's findings. This strategy should avoid a "one-size-fits-all" approach and instead focus on:

- Tailored Messaging: Preparing specific, evidence-based advocacy messages for different stakeholder tiers, including high-level government officials, financial institutions, and international development partners.
- Stakeholder-Specific Engagement: Designing specialized briefing papers and presentations that translate the economic data (GDP, capital growth, and employment) into the specific "language" of each stakeholder (e.g., job creation for policy makers, or market viability for investors).
- Sector-Led Advocacy: Empowering creative associations and guilds with this data so they can advocate for their own sub-sectors using verifiable economic evidence.

II. Medium-Term Institutional Strengthening (2–5 Years): System Development and Market Expansion

These actions require inter-institutional coordination and capacity strengthening.

1. Institutionalizing a National CCI Data and Statistics Program

Lead Institutions: ESS (Technical Lead), MoCS (Sector Lead)

The study highlights that CCIs remain under-measured due to weak institutional systems for routine data production and reporting.

Recommendation: Establish a national CCI data and statistics program that supports regular collection and reporting of core indicators such as enterprise counts, employment, revenues, and costs, disaggregated by subsector, region, gender, and age. This would strengthen evidence-based planning, improve investment targeting, and support monitoring of sector performance over time.

2. Developing a National Market Access and Distribution Strategy

Lead Institutions: MoCS, Ministry of Tourism, Ministry of Innovation and Technology

A major constraint identified in both secondary evidence and qualitative findings is weak market access, limited visibility, and underdeveloped distribution systems.

Recommendation: Develop a national market access and distribution strategy for CCIs that strengthens domestic value chains and supports export readiness through improved distribution channels, structured market platforms, promotion mechanisms, and linkages to tourism and events. Special attention should be given to digital distribution models that enable creators to reach national and international markets more efficiently.

3. Strengthen Diaspora and Export Monetization Pathways

Lead Institutions: MoCS, Ministry of Foreign Affairs, Ethiopian Investment Commission

The study identifies diaspora engagement as a major opportunity for export earnings, international partnerships, and market expansion, especially in music, film, fashion, and digital content.

Recommendation: Strengthen diaspora-oriented monetization pathways by facilitating access to global distribution platforms, improving digital payment systems, supporting diaspora-led investment initiatives, and enabling stronger international marketing and cultural exchange programs. These efforts should be supported by improved intellectual property enforcement to protect creators' earnings from international audiences.

4. Improve Job Quality and Contracting Practices

Lead Institutions: Ministry of Labor and Skills and MoCS

While CCIs generate employment at scale, job quality remains uneven. Many workers face limited contract security and unstable incomes, and the sector is not yet fully captured in the national employment dataset.

Recommendation: Promote improved job quality in CCIs through simplified contracting tools, awareness-raising and enforcement of written agreements, and the integration of creative workers into labor protection and social security pathways where feasible. Improving job quality will strengthen the sustainability of creative livelihoods and increase sector productivity over time.

In addition, the Ministry of Labor and Skills is reportedly developing a national employment database for different sectors. This presents an important opportunity to systematically capture employment data for CCIs using standardized domains, classifications, and codes that can be applied consistently at national and regional levels.

III. Structural and Long-Term Reforms (5+ Years): Measurement Architecture and Enabling Environment

These reforms embed CCIs into Ethiopia's macroeconomic governance systems.

1. Establish a National Cultural Satellite Account (CSA)

Lead Institution: Ethiopian Statistics Service (ESS), in collaboration with MoCS and Ministry of Finance

While this study provides a robust snapshot of the sector's contribution, Ethiopia lacks an institutionalized system to track the creative economy's performance within the national accounts.

Recommendation: Establish a National Cultural Satellite Account (CSA). This specialized accounting framework will allow the Ethiopian Statistics Service (ESS) to isolate and measure the specific contribution of CCIs to the national GDP. Institutionalizing the CSA will transform the creative sector from an "administratively invisible" activity into a recognized macroeconomic pillar, enabling more precise evidence-based policymaking and national budget allocations.

2. Strengthening Intellectual Property Enforcement and Rights Management

Lead Institutions: Ethiopian Intellectual Property Authority (EIPA), Ministry of Justice

Accelerate the operationalization of the Intellectual Property (IP) Tribunal and strengthen the capacity of the Ethiopian Intellectual Property Authority (EIPA) to reduce revenue leakage and protect creator income.

3. Improve Access to Finance for Creative Enterprises

Lead Institutions: National Bank of Ethiopia, Commercial Banks, Development Finance Institutions

Collaborate with the banking sector to design financial products that recognize creative intellectual property and digital assets as a form of collateral, addressing the binding constraint of limited access to credit for SMEs and youth-led enterprises.

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