

Defining the Cultural and Creative Industry: An Exploration of the Nigerian Cultural and Creative Ecosystem

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Keywords: Cultural Industry; Creative Industry; Nollywood;
Cultural Heritage; Intellectual Property; Creative Economy

Abstract

The recency of the cultural and creative industries and the cultural diversity existing among the nations of the world have caused many societies, organisations and governments to define the industry based on the peculiarities of their specific culture and environment. Government agencies like the UK Department for Culture, Media and Sports and multilateral institutions like UNCTAD (United Nations Conference on Trade and Development) have all defined the industry by leveraging on specific criteria that they developed for that purpose. As an industry sector in Nigeria, the cultural and creative industry recently received the attention it deserves when Nollywood (the Nigerian Film Industry) was listed as a significant contributor to the economy of Nigeria, which is Africa's largest economy. This development has made it imperative to understand the components of the cultural and creative industry in Nigeria and leverage such information to define the industry in the Nigerian context. In conclusion, this paper posits that any definition of the cultural and creative industry must incorporate four essential elements: the producers, the regulators, creative cities and clusters and those industries that offer allied support services.



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Introduction

Every society possesses a richly diverse cultural heritage viewed as an asset to the people and which represents a shared identity that binds them together. Stakeholders within the cultural and creative industry exert optimal effort in preserving this heritage and the diverse cultural content within the context of the prevailing political and economic climate. Within the Nigerian context, the cultural and creative industries represent an ever-expanding complex of different economic sectors. In recent times, there has been an increase in focus on those sectors that have high creative intensity, leading to an urgent need towards achieving an all-encompassing definition of cultural and creative industry.

As is the case at the global level, the cultural and creative industries have been generating so much attention at the local level, principally as a result of the interconnection with new media technologies, and because they are considered as an essential source of innovation and contributors to national wealth (De-Miguel-Molina, et al., 2012). Cultural and creative industries promote the transition to new models of sustainable development based on green and smart economy and are becoming an important paradigm for the new European development strategies foreseen by Europe 2020 (Lazzeretti and Capone, 2015).

Despite the resonance at the global level and the growing relevance of the literature

on the issues related to creative industries and the creative economy (Chuluunbaatar, Ottavia & Kung, 2013; Flew & Cunningham, 2010), there exists a raging debate as to which activities are significant enough to be considered as a part of the creative sector. According to the Department of Culture, Media and Sports (DCMS) of the United Kingdom, there is a need to adopt a more widely accepted model. Thus, a principal qualifying factor for a sector to be deemed as creative is a high percentage of creative occupations or what is called creative intensity, inherent within such sector (Bakhshi, Freeman and Higgs 2013). Conversely, others are of the view that the approach should be expanded to incorporate activities relating to crafts (Bertacchini and Borrione, 2013), tourism (Richards, 2011), events, or the experience economy (Power, 2009; Cooke, 2013) and digitisation of cultural assets (De Laurentis, 2006). This attempt to broaden the taxonomy of creative industries to incorporate diverse activities has led to further challenges and continuous evolution in the definition of the cultural and creative industries.

The term 'cultural industries' was originally used by Horkheimer and Adorno (2002) to refer to entertainment that emanated through the industrial production process. These include recorded music, publishing, film, and broadcasting. This position is different from the subsidised "arts" which includes museums and art galleries, the visual and performing arts (Galloway and Dunlop, 2007). This shares a close relationship with the cultural industries

policy plan of the UNESCO in 1978, and that of the Council of Europe in 1980 (Garnham, 1990) and also the French cultural policy of the 1980s (Towse, 2000; Flew, 2002). According to Howkins (2002), conceptually, the creative industry started in the early 1990s in Australia. However, for most commentators on the subject, the term 'creative industries' came into being with the election of "New Labour" in Britain in 1997. Subsequently, the term "creative industries" became prominent in public policy (Flew, 2002; Caust, 2003; Pratt, 2004). Creative industries as a concept, however, is context specific. In some advanced capitalist economies where culture is supported, it has been widely adopted.

To most people, the disparity between the creative and the cultural industries is fuzzy. However, Cunningham (2001) provides a clear explanation of the differences between the two terms. He based his comparison on the historiography of the phrase cultural industries which he argues is "essentially... a concatenation of the arts and the established commercial or large-scale public sector media – a concatenation that didn't hold" (Cunningham, 2001, p. 24). He argues that the emergence of the World Wide Web and digitisation of media have drastically changed the original concept of the cultural industries which emphasised the visual and creative arts, broadcasting, music, and film. The implication, therefore, is that while the cultural industries emerged from advances in technology witnessed during the earlier part of the twentieth century, the creative industries were kick-started by the technological changes witnessed between the end of the twentieth century and the onset of the twenty-first century.

On this background, this paper seeks to identify the critical components of the cultural and creative industry in Nigeria and highlight the principal players within the industry. Leveraging review of extant literature and document analysis and observation, this paper goes further to elucidate on the concept of creative cities and clusters and how they all define the industry and most importantly proposes a definition of the Cultural and Creative Industry in the Nigerian context.

Towards an Ideal Definition of the Cultural and Creative Industry

The creative industries have struggled with some form of identity challenges occasioned by multiple definitions and inconsistent treatment on what qualifies as creative activity (Higgs, Cunningham and Bakhshi, 2008). The deliberations on the issue of a universal definition of the cultural and creative industry have proved to be difficult mainly because of the terminological clutter subsumed within the cultural perspectives. Consequently, most definitions of the industry are founded on an aggregation of five main criteria – creativity, intellectual property, symbolic meaning, use value and methods of production (Galloway and Dunlop, 2007).

Extant literature has proposed diverse definitions for the cultural and creative industry, all proposed in consideration of the different countries where those definitions emanated from and the different scholars proposing those definitions. Some of the definitions are presented below.

Table 1: Existing Definitions for Cultural and Creative Industries

EXISTING DEFINITIONS	SOURCE
<p>“those industries that are based on individual creativity, skill and talent with the potential to create wealth and jobs through developing intellectual property” - includes thirteen sectors: advertising, architecture, the art and antiques market, crafts, design, designer fashion, film, interactive leisure software (i.e. video games), music, the performing arts, publishing, software, and television and radio.</p>	<p>DCMS (1998)</p>
<p>“those activities which deal primarily in symbolic goods – goods whose primary economic value is derived from their cultural value... This definition, then, includes what have been called the ‘classical’ cultural industries – broadcast media, film, publishing, recorded music, design, architecture, new media – and the ‘traditional arts’ – visual art, crafts, theatre, music theatre, concerts and performance, literature, museums and galleries – all those activities that have been eligible for public funding as ‘art’...”</p>	<p>O’Connor, J (1999)</p>
<p>1 - The activities of the cultural industries involve some form of creativity in their production; 2 - The cultural industries are concerned with the generation and communication of symbolic meaning; 3 - Their output embodies, at least potentially, some form of intellectual property.</p>	<p>Throsby (2001)</p>
<p>Horkheimer and Adorno (2002) originally used the term cultural industries to refer to industrially produced commercial entertainment – Broadcasting, film, publishing, recorded music – as distinct from the subsidized “arts” – visual and performing arts, museums and galleries.</p>	<p>Horkheimer and Adorno (2002)</p>
<p>Howkins (2002) argues that the term “creative industry” should apply to any industry where “brain power is preponderant and where the outcome is intellectual property”.</p>	<p>Howkins (2002)</p>
<p>“All industries involved in the creation, manufacture, production, broadcast and distribution and consumption of copyrighted works”.</p>	<p>WIPO (2003)</p>
<p>UNESCO defines cultural and creative industries as “sectors of organized activity whose principal purpose is the production or reproduction, promotion, distribution and/or commercialization of goods, services and activities of a cultural, artistic or heritage-related nature.”</p>	<p>UNESCO (2006)</p>
<p>“... creative industries embraces activities ranging from traditional folk art, cultural festivities, books, painting, music and performing arts to more technology-intensive sectors, such as design and the audiovisual industry, including film, television and radio. Also contained are service-oriented fields, such as architecture, advertising and new media products, such as digital animation and video-games.”</p>	<p>UNCTAD (2010)</p>

Taxonomy of the Cultural and Creative Industry in Nigeria

The evolution in the definition of the cultural and creative industries has made it possible to accommodate industry sectors that hitherto were not considered as creative. This can be attributed to the emergence of the internet and the new media which has proven to be a significant driving force in the creative economy. In Germany, nine core sectors have been identified to be part of the cultural and creative industries. This has been applied in all German studies and in some European reports. However, the UNCTAD Global Databank on Creative Economy and Industries offers 236 codes based on the classifications methodology as contained in the UNESCO framework for cultural statistics (Kwanashie, et al., 2009).

However, in consideration of the fact that a universal consensus is lacking on what defines the term “creative industries”, a study commissioned by the British Council in Lagos (2013) attempt to establish a definition of what constitutes the creative industry in Nigeria (Dandaura, 2013). Their methodology consisted of engaging critical stakeholders across the nation as well as focus group discussion. Their report identified the following sectors as qualified to be included within the CCI sector. These includes:

- Advertising;
- Architecture;
- Arts and crafts;
- Fashion and design;
- Home video, television, film, and radio;
- Music;
- The performing arts – theatre, carnivals, drama, dance, comedy, and festivals:

- Publishing – books, literature materials, and e-resources;
- Tourism and hospitality – cuisine, night-clubs, events and museums, and monuments;
- Visual arts and animation – photography, graphic design, sculpture, drawing.

The growth trajectory of these sectors is diverse as some sectors are more impactful than the others in consideration of their contribution to the growth and development of the economy. Thus, the movie, music, and design sectors play a more contributory role in the Nigerian economy.

The Nigerian cultural and creative industry sector comprises the practitioners in the diverse sectors identified as part of the CCI, the service providers, and the regulators. The producers include those directly involved in individual creativity in the industry. These are the writers, publishers, screenwriters, cinematographers, artists (performing and creative), designers and so on. These producers are supported by a group I chose to call the service providers. The focus of this second group is to provide ancillary services to the industry. Such services include business, financial, and professional services, insurance and real estate. They also include distributive service which incorporates transportation and communications and personal services which focus on providing recreation, entertainment, hospitality and those services linked to personal appearances such as makeup artists, fitness services, and catering.

The third leg of this tripod relationship is the regulators. There exists a number of regulatory agencies within the sector, all set up to protect intellectual property and encourage the growth and development of the cultural and creative sector. The primary regulatory agencies in Nigeria are:

Table 2: Regulators of the Nigerian Cultural and Creative Industry

REGULATORY AGENCY	CORE FUNCTIONS
Nigerian Copyright Commission	The Nigerian Copyright Commission was set up via the Nigerian Copyright Act of 1992 and 1999 as amended. The core objective of the commission is to engender efficiency in service delivery and to also provide needed support to all players in the Nigerian cultural and creative industry sector. Their activities include legislative support, capacity building, advisory services, and enforcement.
National Film and Video Censors Board	The National Film and Video Censors Board was set up in 1993 to regulate the Nigerian film and video industry. The principal activity is to classify all films and video in Nigeria, whether produced locally or those imported. Such classification aims at helping rid the country of sub-standard and unclassified movies and films and the registration of all video clubs and outlets all over Nigeria.
Nigerian Broadcasting Corporation	The Nigerian Broadcasting Corporation was established by Section 1 of the National Broadcasting Commission Act of 2004 with primary responsibility to regulate and control the broadcasting industry in Nigeria. Their vision is to facilitate the development of a broadcasting industry that is sustainable and meets the economic and sociopolitical desires of the citizens of Nigeria.
National Council for Arts and Culture (NCAC)	The National Council for Arts and Culture (NCAC) was established in 1987 and is responsible for the coordination, development and promotion of the arts and culture in Nigeria. The core objective is to leverage on culture as a foundation to build a Nation that projects the rich cultural diversity.
Nigerian Tourism Development Corporation	The Nigerian Tourism Development Corporation (NTDC) is the apex tourism agency in Nigeria established via Decree 81 of 1992, now an act of the National Assembly (laws of the Federal Republic of Nigeria, Cap. 137). Principal responsibility is to make Nigeria a prime tourist destination in Africa and further present tourism as an industry that can contribute immensely to the growth and development of the Nigerian economy.
Advertising Practitioners Council of Nigeria	The Advertising Practitioners Council of Nigeria (APCON) was established in 1988 and was set up to regulate and control advertising practice in Nigeria. Core vision is to promote responsibility and ethical standards in advertising practice; acts as the conscience of the people and as a watchdog for consumers.
Architects Registration Council of Nigeria (ARCON)	The Architects Registration Council of Nigeria (ARCON) was established by the Architects Act of July 1969 to determine the standards and skills required by individuals before becoming a member of the profession.

The Nigerian Creative Sectors

Dandaura (2013), in conjunction with the British Council, identified ten different sectors within the cultural and creative industry. While these sectors contribute to the growth and development of the economy, their percentage contributions are not the same. However, whether movies, dance, craft fashion or stage drama, they all represent creativity and the conversion of imaginative ideas into reality.

The Movie Industry

The Nigerian movie industry emerged many decades ago and is made up of Nollywood that caters for the English speaking movies, the Yoruba movie industry, Kannywood that produces films in Hausa and others that produce movies in Igbo and other indigenous Nigerian languages. The boom experienced within the industry was triggered in 1992 by the direct to video system which was driven by VHS, VCD, and the DVD technology. The first successful video to be shot using this technology was 'Living in Bondage', and its success became the harbinger of a new era in movie production in Nigeria. The growth of the industry can be attributed to the rich cultural diversity which offers a wealth of information and materials from which the movie makers can easily draw from. The content usually appeals to the masses within the country and even to foreigners that share same or similar culture. The strong themes visible are religion, magic, and societal issues like rape and domestic abuse.

In 2009, UNESCO described Nollywood as the largest film industry in terms of output – second only to Bollywood, the Indian film industry. Globally, Nigerian movies are in high demand owing mainly to the vast number of Nigerians residing in different parts of the world. The industry was rated as the third most valuable film industry in the world after generating a total of 1.7 trillion Naira. According to Oh (2014), revenues from this sector trail those of Bollywood and Hollywood at the global box office (\$1.6 billion and \$9.8 billion in 2012, respectively). Officially, Nollywood contributes an average of \$600 millions yearly to the economy of Nigeria, with most of these receipts coming from the Africans living abroad (Oh, 2014). In recognition of the enormous potential inherent in the Nigerian movie industry, the federal government has partnered with diverse international groups and has gone further to set aside funds to support the industry. There is a growing international recognition of Nigerian movie stars at the global stage with the sector attracting foreign artists to act side by side with local stars in local movies as exemplified by the film *Bello* in 2013. Aside from the government, there has been a marked increase in investment from private organisations and multilateral agencies (Moudio, 2013).

The Music Industry

The music industry in Nigeria has witnessed phenomenal growth in the last ten years with its popularity extending far beyond Nigeria to the international music space. The success of the industry can be seen from the recognition of works by Femi Kuti, who won the 1999 KORA Music Award and was nominated on three different occasions for the Grammy

Award. The feat at KORA was repeated by the duo of P-Square in 2010 while 2 Face Idibia won the best-selling African artist award at the World Music Awards in 2008 and BET African artist of the year 2011. Other artists like Tiwa Savage, D'Banj and Davido, have, at different fora, won accolades for the Nigerian music industry. Also instructive is the increase in number of international collaborations within the last couple of years. Such collaborations include ventures with notable western artists like Joe, R. Kelly, Beyoncé, 50 Cent, Jay-Z, Wyclef Jean, Kirk Franklin, and Rick Ross. Despite the success, concerns exist as regards to standardisation from the viewpoint of stakeholders in the industry (Adedeji, 2016). According to data obtained from PricewaterhouseCoopers, Nigeria's music industry accounted for total revenue of US\$44 millions in 2017. This is an increase from a total of US\$32 millions in 2012. Growth forecast is at 0.9%, and revenue is estimated to reach US\$73 millions by the year 2021 (PricewaterhouseCoopers, 2017).

Although Nigeria is the most populous country and the biggest economy in Africa, spending on music is meagre. Legitimate music retailers struggle side by side for the market with highly sophisticated but illegal dealers who engage in pirated CDs. This has led to artists complaining of low or non-existent returns on the release of their albums and has further compelled them to depend on live performances as their primary source of income. The advent of subscription services is a welcome development in this regards. Today, we have Deezer, iROKING and Spinlet representing subscription services currently operating within the Nigerian environment.

The Arts and Crafts

Like many other creative industry subsectors, arts and crafts enjoy a rich cultural heritage that leverages the multiculturalist nature of Nigeria. However, the sector has suffered so much neglect owing to the governments' focus on oil and gas exploration and exploitation. Objects of arts possess intrinsic artistic values that endear them to the beholder. Predominant works or arts and crafts incorporate activities in pottery, weaving, blacksmith (including goldsmith and silversmith), jewellery, leather works and others. A unique feature of arts and crafts is that it offers the craftsmen the fulfilment of being involved in the total production process (Irivweiri, 2009).

The arts industry is highly fragmented and consists of mainly sole proprietors and artisans who engage in the business for income. Most of the operators in this industry operate small scale, and this creates a vacuum readily filled by the influx of foreign alternative to such products. A considerable challenge militating against the growth of the industry is the difficulty in enforcing the rights to specific creative works (Nwogu, 2014).

The Fashion Industry

There has been an unprecedented level of exposure to the Nigerian fashion industry in recent times which has translated into unique business opportunities for the operators in the industry. Today, Nigerian designers are regularly featured in international fashion shows and have gained footholds among global celebrities. This growth is a result of the institution of fashion weeks coupled with the explosion of new and social media. The emergence

of a promising number of marketing and sales platforms has helped Nigerian designers to project their products to a mass market. This is in addition to the developments in fashion retailing that has increased the number of local and international brand shops seeking to carry Nigerian designers' products. Thus, fashion is now less imported to Nigeria from the western world as part of the cultural imperialism. Nigeria fashion is now a result of a symbiosis between non Nigerian (primarily western) and Nigerian influences. Intricate designs are now being created using local "Ankara" (100% cotton African wax print with vibrant patterns), and "Batik" (fabric produced through a technique of wax-resist dyeing) presented in multicoloured and bright hues for maximum attraction. Some of these designs are now being printed on different fabric – cotton, silk and many others simply to create a unique product. All these efforts have succeeded in attracting famous players in the international fashion industry as Nigerian fashion is now being patronised by foreign musicians. Renowned international brands that have participated in the Lagos Fashion and Designer Week include MyTheresa.com, Selfridges, and Browns UK.

According to Mrs. Funmi Ladipo Ajila, the President of Fashion Designers Association of Nigeria (FADAN), the Nigerian fashion industry is worth over N2 trillion (Ajila, 2015). She adds that the garment, textile and the footwear subsection of the creative industry contributed 0.47% to the Nigeria's GDP. She attributed this success to the activities of foreign investors in addition to patronage from the teeming Nigeria population who have grown to trust and demand the unique and beautiful products from local designers.

Tourism and Hospitality

The Nigerian tourism industry incorporates the provision of lodging services, cultural events, restaurants, and theme parks. In recent times, the sector has witnessed an influx of international brands, especially in the hotel and hospitality sectors with existing parks and tourist centres being rehabilitated. Analysts in the sector all agree that tourism has the potential of contributing significantly to foreign exchange revenue and thus facilitate the much sought after diversification of the economy. Nigeria is blessed with pleasant tropical climate, diversity of wildlife, historical sites, beaches, waterfalls, all crowned with a welcoming and culturally rich population (Bankole, 2002). Nigeria is blessed with unique and diverse weather conditions: the semi-temperate weather of the Jos Plateau, the humid weather in the Southern part of the country and the Harmattan in the North. Vegetation range from the mangrove rainforest of the Nigerian Delta, the grassland and shrubs of the North to the tropical rainforest of the South East and South West.

According to Taylor (1973), tourism assets such as sandy beaches, waterfalls, springs, climate, and sunshine are prerequisites for full-scale development of the tourism industry in any country. Thus, these sites do not create a tourism business on their own but are seen as resources waiting to be tapped into for economic growth. Private sector organisations, as well as state governments, are today engaged in different business within this sector. Examples include the Obudu cattle ranch, which also gave life to the mountain breed of cattle, the Calabar carnival, which is now being replicated in Imo, Rivers, and Akwa Ibom States, among others. There also exists the Argungu fishing festival, the Adaworisha masquerade in Lagos and many others.



Publishing

Historically, the advent of book publishing in Nigeria can be traced to the setting up of the first printing press in Calabar in 1846 by the Presbyterian mission (Oyeyinka, Aganbi and Atewolara-Odule, 2016). The objective then was to propagate Christianity through the provision of religious literature to new converts. Centuries later, there were prospects of a robust publishing sector as Nigeria had a vibrant publishing industry accounting for the largest in Africa. Unfortunately, most of this collapsed with the economic downturn of the 1980s.

In recent time, there has been some marked improvement in the business of publishing in Nigeria. According to the National Bureau of Statistics (2016a), the publishing industry contributes US\$79.55 millions representing 0.03% of Nigeria's gross domestic product (GDP). Usually, authors are paid in the form of royalties annually. Most of the companies in this

sector are not listed on the stock exchange making it difficult to access information on revenue and how much is paid to writers as royalties (Nwankwo, 2017).

Aside from University Press Plc and Learn Africa Plc, there exists a number of emerging publishers in Nigeria such as Kachifo, Parresia Publishers and Cassava Republic. This new crop of publishers has facilitated the publishing of creative works in Nigeria. The lack of a robust publishing industry in Nigeria has led to the emergence of author-publishers who are known for producing poor quality books and literature materials.

Advertising

From the establishment of the West African Publicity Limited by UAC in 1928, the advertising industry has grown to a huge industry aptly classified under the creative industry. The Association of Advertising



Agencies of Nigeria, AAAN has disclosed that advertising expenditures for 2013 grew to N125 billion from N91 billion in 2012, explaining that the figure represents advertising spend from the organised private sector alone (Ekwujuru, 2014)!

The importance of advertising in the economy is evident when we consider the need to promote goods and services. However, as a result of the low reward associated with advertising, many agencies have set up 'media independent' subsidiaries. Also of interest is the emerging trend of seeking international affiliations. Many of the big agencies in Nigeria has one form of business relationship with foreign counterparts or the other; a strategy that is driven by the influx of foreign brands into our local environment. Ac-

ording to Doghudje (1990), these connections avail the local agencies the opportunity for foreign training facilities and make it easier to win and retain accounts of blue-chip companies and multinationals. Another development is the emergence of hot shops which are small-sized agencies focused on developing creatives concepts for more prominent agencies or to their clients. Most often, such mini-agencies are managed by creative artists and copywriters.

Architecture

Though there is an association of architects in Nigeria, the architecture industry in Nigeria is fragmented. As a result of globalisation and evolution within the industry, there exists a widening

gap between Nigerian architecture and Nigerian culture as can be seen across the many cities of Nigeria. Today, there is little or no correlation between these structures and the environments where they are found.

Across the main cities in Nigeria, architectural designs are relatively homogenous. However, the semi-urban and rural areas are dotted with buildings that characterise and represent the multicultural nature of Nigeria and are classified into two broad groups – the Muslim north and the predominantly Christian south. What we refer to today as Nigerian architecture is a pre-potency of imported themes and models that have little correlation with the traditional cultural heritage (Rikko and Gwatau, 2011). The effects of colonialism, exposure to western education and urbanisation has resulted in the gradual disappearance of the traditional courtyard type of homes associated with Nigerian culture. The industry is regulated by the Architects Registration Council of Nigeria (ARCON), a body responsible for determining the standards and skills required by individuals before becoming a member of the profession.

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The Performing Arts

Performance by musicians, singers, storytellers, and actors has long been accorded legal protection nationally and internationally (Odunaike, 2016). The sector constitutes a specific genre of intellectual property in Nigeria. Performers focus on interpreting, translating and transmitting stories, songs, folklore and diverse literary works through performances and thus constitute an intrinsic part of the creative value chain.

Performance in Nigeria dates back to the pre-literary period. However, the integration of performance with intellectual property rights emerged recently with the introduction of legislatures that accords certain rights to performers. Etymologically, performance in Nigeria can be traced to the old Western Nigeria and the traditional Yoruba travelling theatre – *Alarinjo* (Ojuade, 2002). In consonance with the multicultural make-up of the nation, there exist diverse traditional performances linked to specific ethnic group. The *Egungun* masquerade in Yoruba land; *Ekong* masquerades in Ibibio (present day Akwa Ibom state); *Borgu* puppet show and the *Yankamanci* in the North, the Tiv *Kwag-hir* among others (Odunaike, 2016).

However, contemporary theatre in Nigeria can be traced to the works of Wole Soyinka which include *Trials of Brother Jero* (1960), *The Lion and the Jewel* (1963), *Kongi Harvest* (1965), and many others. Other eminent Nigerians who played a critical role in the growth of the performing arts include Ola Rotimi, Kola Ogunmola, Duro-Ladipo, Adeyemi Afolayan and Oyin Adejobi. The broadcast media also contributed heavily at this early stage with the production of television series such as *Cock Crow at Dawn*, *Village Headmaster*, *New Masquerade* and many others. The success recorded in Nollywood in recent years has been a boost for the performing arts.

Visual Arts

The Nigerian art market comprises a small group of new and established collectors, a network of art galleries spread across the nation, annual auctions in Lagos and London, and a considerable number of paintings and sculptures produced by both students and professionals. Most activities in this sector aggregate within the city of Lagos, the commercial capital of Nigeria. As of 2012, the number of Lagos-based collectors stood at seventy. With a robust and ever-rising middle class, the potential of building a vibrant art market exists. Consequently, there has been renewed interest in Nigerian arts both locally and internationally. El Anatsui, the Nigerian-based Ghanaian, holds the record for auction sales. His 'Another Plot' was sold for US\$1,180,000.00 in 2012 (Castellote, 2015).

At the 2013 Bonham's Africa Now auction, records were broken by the works of renowned artists: Ben Enwonwu, Erhabor Emokpae, Uche Okeke, and Uzo Egonu. These are testimonies of the growing popularity of Nigerian artists. For instance, all the top ten artworks at Bonham 2013 and 2014 event were by Nigerian artists living in Nigeria or those residing abroad. Works by Yusuf Grillo, Gani Odutokun, and Peju Alatise increased in value during this period. Worthy of mention are the works of Bruce Onabrakpeya.

Overall, the growing interest in both modern and contemporary African arts saw to the increase in revenue at Bonhams in 2014. With reference to arts, Nigeria is now seen as the new China in response to the scramble for artworks from Nigeria (Castellote, 2015).

Clusters, Creative Cities, and Regions

According to Flew (2002), a critical element in the development of the cultural and creative industry is locational geography or the formation of creative cities and clusters. This has been associated with what Porter (1998) defines as "geographic concentrations of interconnected companies and institutions in a specific field" (Porter, 1998, p. 78). Clusters emerge as a result of a conglomeration of specialised suppliers, necessary infrastructure, producers of complementary products, specialised customers and academic and research institutions that promise specialist knowledge, information, and training, technical and educational support. Popular examples include the Italian leather industry, New York's Silicon Valley, Hollywood and Nollywood film industry and the German chemicals industry. According to Florida (2012), cities with significant concentration of the creative class tend to be economic winners whereas those with a higher concentration of working class tend to become economically stagnant. Florida (2012) went further to state that job generation is increasingly becoming the prerogative of cities and not of corporations, and that cities...

"...give rise to the clustering, density, and interaction that generate economic growth. They speed the metabolism of daily life, and they accelerate the combinations and re-combinations that spur innovation, business formation, job creation, and economic growth" (Florida, 2012).

Clusters facilitate the generation of substantial competitive advantage within them. This happens in three different ways: access to specialist input in terms of labour, technology and knowledge; promoting in-

novation through capacity enhancement and facilitating quick and flexible response to new opportunities; and, finally, promoting the formation of new business by encouraging access to requisite labour, capital, skills, and technology. However, with the advent of new media and world reaching digital platforms, it is possible to distribute ones' creative product to a wide range of audiences and at the same time, source for materials from any part of the globe – as far as the requisite bandwidth is available. The implication is that product distribution to workplace, homes, institutions and content sourcing is no longer linked to a location. This decline in the importance of location was predicted at the inception of New Media technologies.

Contrary to this view, however, location exerts some significant influence in the cultural and creative industries in Nigeria. The Nollywood industry is more active in Lagos, Asaba, Jos, Ibadan, Kano and Enugu whereas the publishing industry is more prominent in Lagos and Ibadan. For the music industry, huge clusters exist in Lagos for contemporary music while for local and religious music, Aba, Onitsha are pre-eminent. Fashion is more evident and organised in Lagos but with an enormous informal gatherings in Aba. Even within Lagos, there still exist some form of clusters with sales of video and music predominant in Idumota and Alaba, respectively.

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Why do these industries aggregate as clusters in these locations? Interviews and desk research reveals that the creation of these clusters are connected to the availability of essential infrastructure, technology, labour force, market demand, but most importantly, state government policies. Governments can stimulate the establishment of clusters through tax rebates, the establishment of training and research institutions and the provision of funding which is a huge requirement in the cultural and creative industry. The availability of these incentives always facilitates the movement to and location for creative clusters. For instance, the location of the National Film Institute in Jos is believed to contribute immensely to the Nollywood cluster in this place. This, of course, is in addition to the semi-temperate climate and topography. Markets for finished goods are also a critical determinant in the creation of creative clusters. The need for a market for creative products is imperative. Thus, the Alaba International Markets and the Idumota markets are huge pipelines through which music and films are distributed to diverse markets globally.

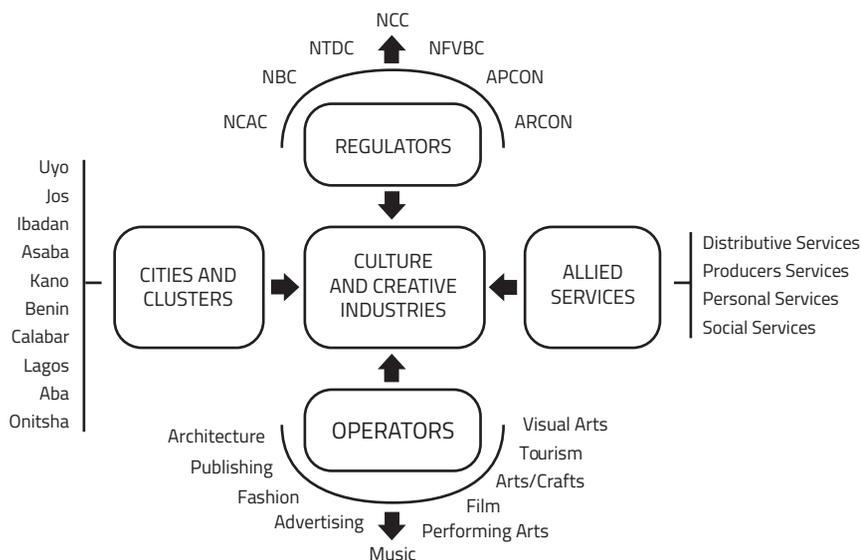
Some Nigerian cities have initiated plans to develop their creative and cultural industries through private initiatives, public interventions, and government policies. Specifically, this is usually in the form of a significant policy objective; the creation of Tinapa by the Cross River State government was to drive the establishment of a film industry cluster in that region.

Existing Definitions Versus the New Construct

From the foregoing, the cultural and creative industries have received different definition from various organisation and scholars as they struggle to arrive at a unified and standard definition of the industry. The DCMS defined the industry from the perspective of wealth and job creation which is made possible by intellectual property. Emphasis on intellectual property was also given by Howkins (2002), Throsby (2001), WIPO (2003), and UNESCO (2006). Curiously, in defining the industry, UNESCO (2006) and WIPO (2003), referred to a broader classification that encompasses diverse activities and actors in addition to the core productive activities. UNESCO made specific reference to "all sectors of organised activity..." and WIPO referred to "...all industries...". By being silent on the specific industry sector or activity, their definition reads like a safe attempt to incorporate any industry component, actor or activity that might be identified in the future.

These definitions were all silent on, or at best, made tangential reference to the regulators and creative cities and clusters which have all evolved to be an integral part of the cultural and creative industry, especially in emerging markets of sub-Saharan Africa with emphasis on Nigeria. Moreover, existing definitions took cognisance of the local environment where such definitions emanated from. The need for a localised definition in the Nigerian context is therefore apt given the uniqueness of the industry in Nigeria and the need to take into consideration all the components of the cultural and creative industry. The attempt at a new localised definition drew heavily from the critical elements as highlighted by Galloway and Dunlop (2007). Consequently, in the Nigerian context, this paper posits that any definition of the cultural and creative industries must incorporate four essential elements: the producers, the regulators, creative cities and clusters and those industries that offer allied support services.

Figure 1: Components of the Nigerian Creative Industry.
Source: Own elaboration





The convergence of the individual sectors (creative cities, allied services, regulators and the industries) gives rise to the cultural and creative industry. There is a considerable interdependence between these sectors to ensure an end to value creation across the chain. Consequently, the cultural and creative industries, therefore, refer to those industries that depend on individual creativity with the capacity to attract intellectual property rights which can be commercialised for economic benefits and incorporate the regulators, the creative cities and clusters as well as allied and support services. This definition is a pragmatic attempt to capture all the critical elements that coalesce into the Cultural and Creative Industry in Nigeria.

Conclusion

Nigeria's economy has evolved to be one of the biggest in Africa and with a population of about 174 millions, the expectation is that by the year 2020, it will grow to become one of the top twenty economies in the world. A new entrant and significant contributor to the recent rebasing of the economy is the cultural and creative sector. The importance of this

sector, given the tremendous contribution it is making towards the growth of the Nigerian economy, makes it imperative to identify the components of the cultural and creative ecosystem, highlight the potentials of the industry, bring to the fore the challenges inherent in the industry, but most importantly, propose an all-encompassing definition of the industry in the context of the Nigerian environment. Based on this review, therefore, the cultural and creative industries incorporate not just the core industries of film, music, fashion and so on but also the creative cities, the regulators and those that offer allied services. By bringing together these four critical components, a new definition is proposed that takes cognisance of the unique Nigerian environment.

Such definition will drive focus and direction for the industry and consequently stimulate growth and development across the four cardinal component of the industry as proposed. In addition, a comprehensive mapping exercise is recommended which will lay the necessary foundation to facilitate future policies that will address the requirements for growth of the cultural and creative industries in Nigeria.

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