



Rwanda Creative and Cultural Industries Mapping

Research Findings Report

External

December 2023

www.britishcouncil.org/research-policy-insight

Introduction

The British Council in Rwanda is one of thirteen countries that deliver Arts programming in Sub-Saharan Africa. Through the delivery of its Arts programme, the British Council aims to support and contribute to the arts ecosystem in the different countries and contexts it operates in and stimulate new ways of connecting with and understanding each other through the arts.

Our programmes are delivered by partners who are best placed to lead and tell the stories of their local art sectors and are underpinned by inclusive and participatory research methods – ensuring their initiatives are grounded in and respond to the needs, opportunities, and challenges of the places where they work.

The British Council in Rwanda has commissioned Ravel Consulting, a research agency founded and based in Kigali, to design and implement a research mapping project that aims to support a deeper understanding of Rwanda's creative and cultural industries.

The following report captures an overview of research findings from the mapping exercise conducted between September and November 2023. These findings intend to inform and support the future strategy and programme development of the British Council in Rwanda.



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Foreword

Dear Reader,

I am pleased to pen this foreword for The British Council's Creative and Cultural Industries (CCI) Mapping Report, and to reflect upon the unwavering dedication of our government to pave the way, for a future in which the creative economy sustainably contributes to our nation's economic development.

As we navigate the ever-evolving landscape of cultural and creative expression, it is imperative that we remain steadfast in our determination to make room for initiatives fostering access to markets, enhancing capacity building, and promoting inclusivity, within this important sector.

Through collaborative activities and strategic partnerships, we endeavour to create an equitable environment where every aspiring artist, and cultural entrepreneur, finds the right infrastructure for their voices to be amplified, and their visions to be realised, thanks to the right policies.

Indeed, the findings of this report underscore an opportunity to bridge the gap between policy intent and practical implementation, ensuring that our regulatory framework remains agile, and responsive to the evolving needs of our CCI's.

We hereby reaffirm our solid commitment to collaboration, and knowledge-sharing, as catalysts for sustainable growth and development.

We encourage research initiatives such as this mapping report, as through such endeavours, lies the foundation for a future where creativity flourishes, nourished by the collective wisdom, insights, and data collected here.

Lastly, as our Ministry brings together Youth and Arts, we acknowledge that our young minds have a critical role to play in shaping the creative landscape of today and tomorrow, while being firmly rooted in the history, and culture of our nation. The Government of Rwanda will continue to nurture generations of creative leaders, empowering them to spearhead transformative change and drive innovation, for the CCI's, and beyond.

Together, let us harness the power of imagination, to forge a future where creativity knows no bounds, and our cultural heritage stands as a beacon of inspiration in the pursuit of equity, inclusivity, prosperity, and dignity.



Sandrine UMUTONI

Minister of State for Youth and Arts





Glossary of Terms, abbreviations and acronyms

Arts collectives	Defined in this report as a group of artists working together, either formally or informally, to achieve a common objective.
Audio-visual	A creative domain comprising music (including production), film (including movies and series), creative technology (including digital design), photography.
CCH	'Cultural and Creative Hubs'. Defined in this report as a place, either physical or virtual, which brings creative people together.
CCI	'Creative and Cultural Industries' is used in this report as a catch-all term to include all creative and cultural sectors and the wider associated value chain.
Creative and cultural sector	The 'creative and cultural sector' has been used as a generic term to describe all types of artforms included in the remit of this report.
Creative domains	'Creative domains' is used in this report to describe the broad clusters of artforms included in the remit of this report specifically, visual-arts and design, audio-visual, performance, and literature.
Creative sub-sectors	'Creative sub-sectors' refer to the more specific types of artforms included in each creative domain e.g., within the domain of visual-arts and design are the sub-sectors of fine arts, architecture, design, craft and fashion. This is in line with the UK Government DCMS toolkit classification.
Literature	A creative domain comprising books and poetry (including spoken word).
MINUBUMWE	Ministry of National Unity & Civic Engagement
Performance	A creative domain comprising theatre (including comedy) and dance
RAC	Rwanda Arts Council
RCHA	Rwanda Cultural Heritage Academy
RSAU	Rwanda Society of Authors
SSA	Sub Saharan Africa
Visual Arts & Design	A creative domain comprising fine arts (including painting, drawing, sculpture), architecture, design, craft (including weaving, jewellery making, pottery), fashion.

Background and Approach

Objectives

The aim of this study is to help support an overview of the arts sector in Rwanda and provide a set of recommendations as to the role the British Council and key stakeholders can play in contributing and adding value to the arts ecosystem.

Specifically, this study sought to:

- Explore the characteristics and capabilities of different types of organizations and artists.
- Provide insight into the needs, challenges, and scale opportunities across the sector.
- Provide recommendations as to how the British Council and its partners can best contribute towards sector growth.
- Understand the opportunities that are available to creatives from minority groups (including women and those with disabilities) to be able to create art and collaborate with other creatives.

Approach

A mixed-method approach was conducted, enabling the research team to consult with various sources.

This included:

- A literature review including recent local and regional research reports.
- Twelve in-depth interviews and one roundtable discussion with sector experts and influencers.
- A mapping survey of 140 sector practitioners, organisations, and collectives.
- Findings validation event held in the Kigali Public Library on the 22nd November 2023

Research was conducted across September and November 2023 by the consultation team Dida Nibagwire, Amy Quantrell, Benie Claudette Iriza, Frida Uwera and Chance Mukamusoni.

The study aimed to speak to people from as diverse a cross-section of the sector as possible, from leading sector advocates and experts to funders, artisans, and practitioners from across Rwanda. This study explored the sector across four key cultural and creative domains and 12 sub-sectors.



Domains and sub-sectors

Domain	Sub-Sector
Visual Arts & Design	<ul style="list-style-type: none">● Fine arts (incl. painting, drawing, sculpture)● Architecture● Design (incl. graphic and interior design)● Craft (incl. weaving, jewellery making, pottery)● Fashion
Audio-visual	<ul style="list-style-type: none">● Music● Film (incl. series, movies)● Creative Technology (incl. digital design)● Photography
Performance	<ul style="list-style-type: none">● Theatre (incl. comedy)● Dance
Literature	<ul style="list-style-type: none">● Books (incl. fiction and nonfiction writing)● Poetry (incl. spoken word)



Limitations

Whilst this study aimed to be as inclusive and representative as possible within the resource and time available – it is by no means a comprehensive census of the sector.

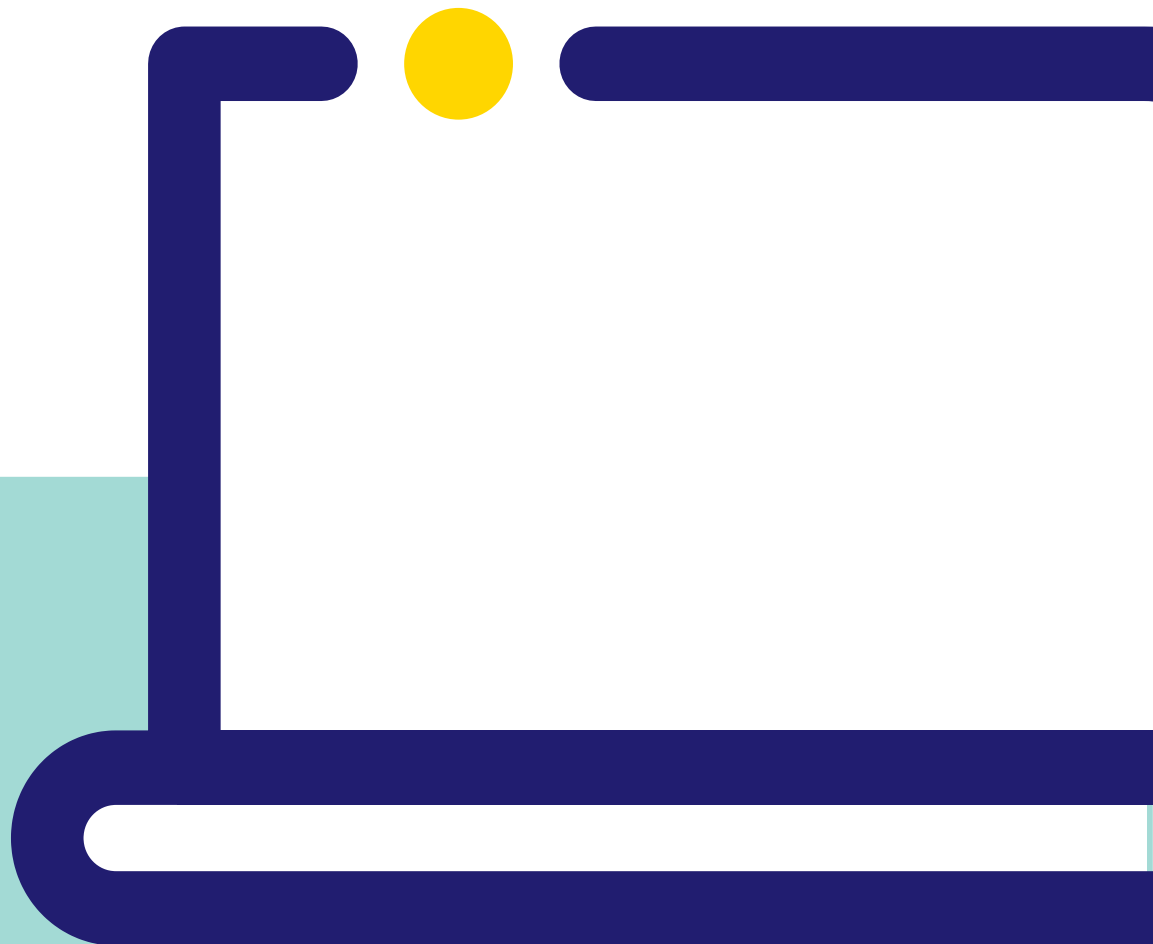
Rather, this study seeks to provide a snapshot of the types and characteristics of individuals and organisations operating in the creative and cultural industries in Rwanda and to surface key challenges and opportunities facing the sector as a whole.

As no comprehensive data set of the creative sector in Rwanda exists, this study built its own sample from a mix of personal contacts of the research team, existing data, and snowball sampling.

This means that findings are reflective of the sample, rather than representative of the sector, and should be read as indicative in nature.

Given time and resource restrictions the research team were not able to conduct in-depth explorations of every sub-sector. Notable exceptions in the mapping to date include Architecture, which is not currently covered in depth.

Some sub-sectors, such as advertising and media, were excluded intentionally due to being outside the remit of the British Council.





Overview of findings and key recommendations

Overview of Findings

This section of the report provides an overview of the findings from across the sector arranged around five

- 1 Livelihood and job creation
- 3 Training and capacity strengthening
- 5 Policies and representation

key themes emerging from the research. Key themes:

- 2 Market access and circulation of work
- 4 Diversity and inclusion

1. Livelihood and job creation

One of the reported drivers of this is the negative narrative that those who work in the creative and cultural sector do it out of 'passion, rather than profession'.

The idea that creative activities are hobbies and not a livelihood for practitioners not only restricts the extent to which artists feel the sector is taken seriously, but also the amount people are willing to pay for creative products. There is a keen sense that the true value of creation and creativity – the research, design, development, rehearsal, and production – is rarely appreciated, and artists are expected to pour time and effort into these productions 'for the love of it' without needing financial remuneration for their time and talent.

Of the 140 people who participated in the mapping, over half (52%) were receiving funding from multiple sources. However, by a significant degree, the most important source for most was commercial activities.

88% of participants are generating income from public sales / events and 46% from commissions and assignments.

76%

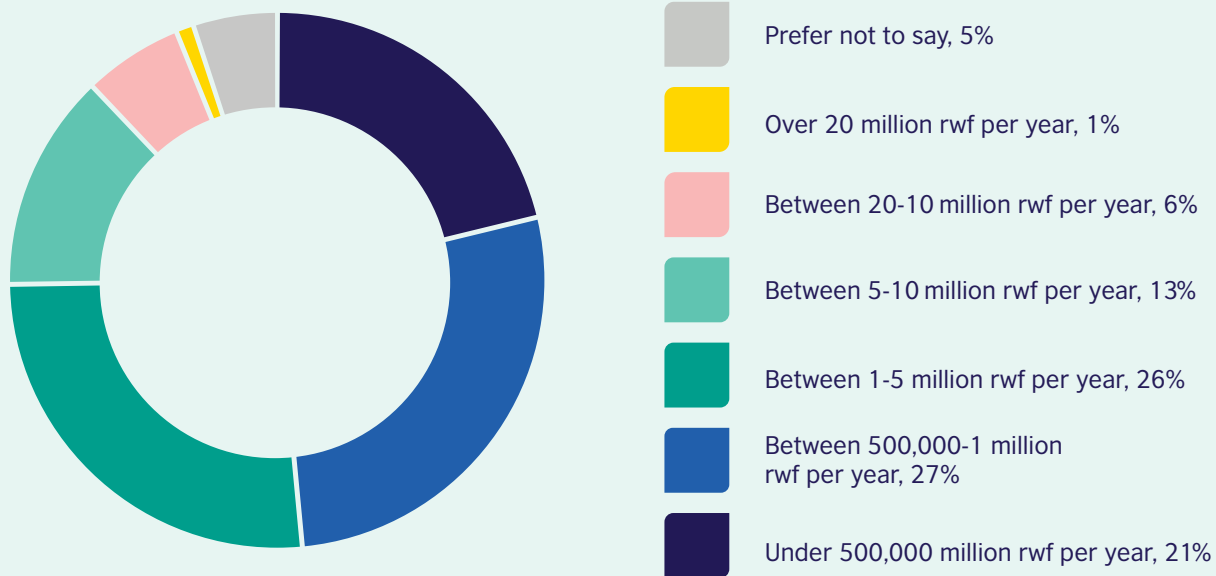
of survey participants rated access to funding and finance as serious / very serious issue.

Total telephone survey sample (N=140)



Reported Income levels for those employed full time in the creative sector

Q Which of the following best describes you / your organisation's annual income?



Whilst heavily reliant on commercial sources, many reported the multiple challenges they face which include:

- Struggles with knowing what they can charge and what the market will bear – especially those reliant on domestic markets.
- Unstable income making it difficult for practices to feel secure or to invest.
- Some sectors such as music and film suffer additionally due to copyright issues and the lack of revenue generating options from streaming platforms.

Most creatives surveyed reported generating only modest levels of income from the sector.

74% of those included in this survey reported working full time in the creative sector. Of these, 40% stated their annual income as under 1 million RWF per year. By way of comparison, the salary of new graduate teachers in Rwanda is approximately 2.9 million RWF per year (source: MIFOTRA).

Creative technology, photography and fashion were the sectors that skewed towards the higher income brackets. Dance and music skewed towards the lower.

Those most likely to be earning at the lower end of the income scale are women, those in rural communities and those working part time.

Grants are seen as only accessible to few and come with a high cost to manage.

Only nine survey participants (6%) described receiving funding from grants and, of these, all bar one was also raising money through sales or commission. Grants (such as those from international and local development organizations) – whilst playing a key role for some organizations and individuals – are not being widely accessed.

Participants shared that firstly, grants are not always easy to find, and knowing where to look is often described as the first barrier. They added that grants are difficult to secure due to complicated application processes and difficult to manage due to complex reporting and compliance procedures.

Participants reported that often applying for and managing grants requires administration skills (such as English language writing) that most artists and creatives do not have. Even those who do rely heavily on grants do not find the process or managing them simple with most common complaints being around:

- Complex procurement processes / requirements are not always aligned with the creative sector.
- Ringfenced funding conditions make program management complex.
- Matched funding requirements are difficult to obtain.
- Financial management and reporting requirements are heavy.
- Grants not awarded in a timely fashion.

The costs associated with production and creation are one of the greatest challenges makers and artists face in securing stable livelihoods from their art.

Across all sectors, artists and makers reported the availability and costs of equipment (e.g., cameras, microphones) and resources (e.g., paint, fabric) as one of their biggest challenges. Indeed 63% of survey participants reported a lack of access to equipment and resources as a serious or very serious issue.

The limited availability and access in Rwanda often require artists to bring in equipment and resources from abroad (when they can) which increases the costs and therefore the risk of creative activities.

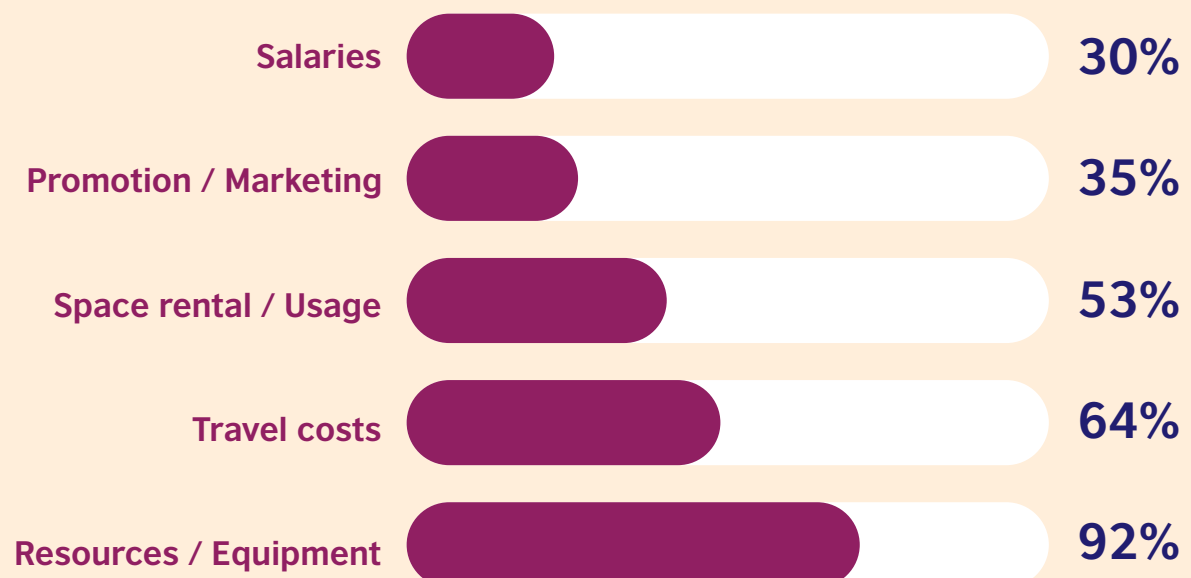
- Risks that equipment will not be effective / give the desired results with little recourse to seek help, support, or refund.
- Risks that the end product will be so expensive as to be unsaleable / loss-making for the creator.

None were aware of any support e.g., tax subsidies etc. available to help with the cost burden of creation, or with specific issues such as importing materials.



Main Expenses

Q What are the main expenses for you / your organisation? (multicode)



Total Telephone Survey Sample (N=140)

2. Market access and circulation of work

To build audiences and markets there is a need for a consistent flow of creative products, productions and outputs to provide a regular and credible offer. To do this, collaborations, networks and fixed and purpose-built spaces for practice and performance were seen as essential to provide this circulation of work necessary to build an audience that values the sector.

However, for many, finding platforms and spaces through which to showcase their work and access audiences is a challenge.

Whilst Rwanda has a range of entertainment venues which occasionally host creative events and exhibitions there remains a lack of dedicated and purpose-built infrastructure for the arts that are not only suitable as performance spaces but equipped to deliver curated content.

Many exhibition and performance spaces are hotels/cafes / multipurpose venues which are not equipped for well-produced performances / long term curated exhibitions. They often lack the people and the skills to curate calendars of events, support work and grow networks. Many of the newer venues in Kigali are big, and not appropriate for smaller intimate events.

Digitally, whilst social media plays a role in promoting work to existing and close networks, participants described how it is difficult to access new, international markets this way.

Whilst inroads to digital market places are being made by organizations such as Africa in Colors and RDB, artists today still struggle to find digital (as well as physical) platforms to exhibit their work

Despite the small size of the sector, many feel they lack opportunities to network, collaborate and exchange ideas.

65% of survey participants stated that a lack of connections and exchange was a serious issue in the sector. This lack of networking and collaboration was not only an issue internationally or regionally, but within Rwanda itself.

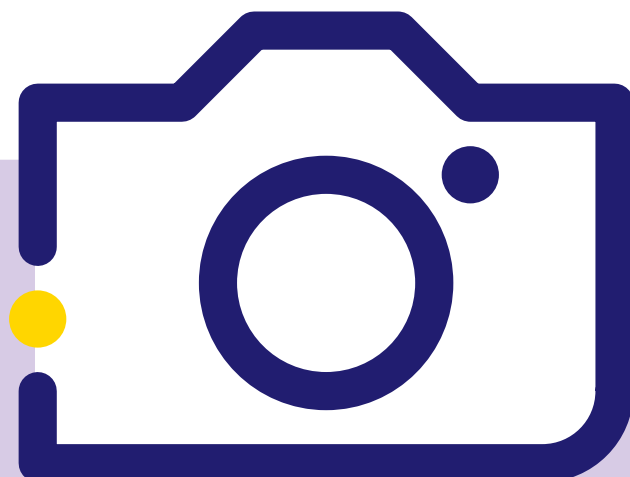
62%

of those surveyed reported a lack of production and exhibition spaces as a serious or very serious issue.

Total telephone survey sample (N=140)



Despite being a small sector, it is not always open and as inclusive as it could be with some – particularly younger participants - describing challenges breaking into 'the scene'. Personal networking - although enjoyed and welcomed - was viewed as 'hit and miss' and difficult to act upon unless there is a live / current project opportunity. A stronger model proposed was a focus on institutional networking, collaborations and partnerships between collectives and venues to provide not only more security and longevity between these connections, but also more opportunities for these connections to convert into live projects and opportunities. These networks would then feed more consistent creative outputs into a central hub, around which audiences and markets could be grown.





3. Training and capacity strengthening

Rwanda’s creative arts schools and institutes are doing much to increase the skills and potential of young creatives.

Institutions such as the Rwanda Creative Arts and Music School and Nyundo Arts School are having a significant impact on both the quality of arts education and the capacity and creativity of a new generation of artists.

Alongside instruction in art, students are now being taught professional skills needed to thrive in a modern creative and cultural sector e.g., contract law and copyright.

Participants also shared that students are being encouraged to learn about and practice traditional artforms e.g., instruments and dance in order to create new pieces of art that are authentically and uniquely Rwandan.

However, in mainstream education, creativity and arts education is often undervalued.

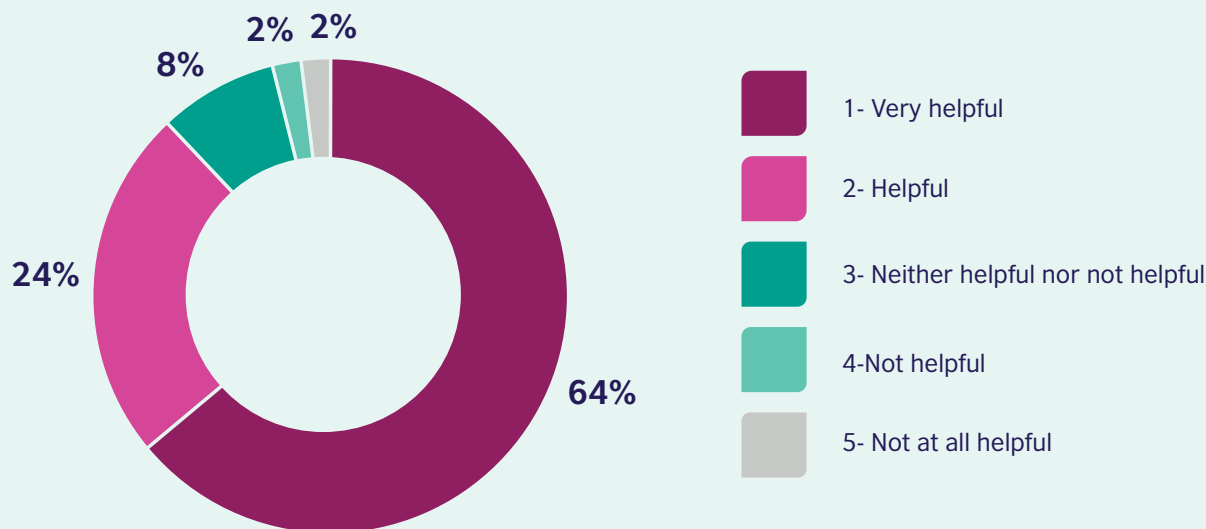
Despite the success of specific arts education institutes, creatives who work with youth and communities bemoaned a lack of focus on creative education in mainstream education.

In their experience, many parents and educators see creativity as secondary to subjects such as science and languages, and often children are discouraged from activities such as reading literature or practicing arts and performance.

Activities such as theatre and dance clubs and competitions are no longer encouraged in schools, resulting in few opportunities for young people to experience and practice arts.

Appetite for training and capacity strengthening support

Q How helpful would better access to professional development, technical training and mentorship be to your organisation?



Total Telephone Survey Sample (N=140)

The appetite for more training and capacity strengthening support in the sector is strong.

The creative sector is diverse and dynamic, especially in areas where digital and new technologies are influencing and shaping the industry. Support to upskill and develop talent and expertise across the creative and management side of the industry was strong.

Specifically, areas that require either access to expensive technology and new digital / new media skills or those that relate to business and organizational management were highlighted for additional strengthening.

Areas described as requiring highly technical skills and new technology were singled out as areas where local capacity was particularly weak as they require exposure to and experience with expensive technology (that is not readily available) and access to continued professional development and training which can be expensive to pursue. Because of the lack of local capacity in these areas, creatives often either have to 'farm out' postproduction to Europe / US at great expense (or forego this stage, which reduces the quality of the final outputs and limits how competitive products can be regionally and globally), or wait for the few Rwandan technicians with these skills to become

available, limiting productivity and diversity.

Alongside technical training there is a growing awareness, particularly from those more experienced creatives who are now transitioning into roles beyond being individual artists such as curation roles, venue management, production house management etc., that they need to be better skilled and equipped in the business management of the creative sector.

Specific creative industries training needs mentioned.

Technical Skills

- Postproduction in film and music.
- Lighting, sound, and stage technicians in the performing arts.
- Graphic and digital design.
- Curation skills

Management Skills

- Project management
- Grant application
- Grant Management
- Reporting
- Finance management
- Tax
- Importing and exporting
- Pitching
- Contract law
- Client management
- Portfolio creation
- How to monetize your work
- How to search for opportunities

4. Diversity and inclusion

This research found that women and marginalized groups continue to be underrepresented across many areas of the sector.

sub-sectors of the industry however, in all areas men out numbered women.

Whilst our survey is not a census, these findings were supported by the experiences of qualitative participants who – whilst often describing an improvement over time – reported that men still dominate the creative and cultural sector.

Areas where women seem to be most equally represented track along traditional 'gendered' roles E.g., fashion and design had the highest levels of female representation whereas dance, theatre and creative technology were found to have some of the lowest.

partly due to the difficulties women found in accessing male dominated networks / platforms. In our survey men were found to be twice as likely to report being in formal or informal networks such as arts collectives or members of creative hubs.

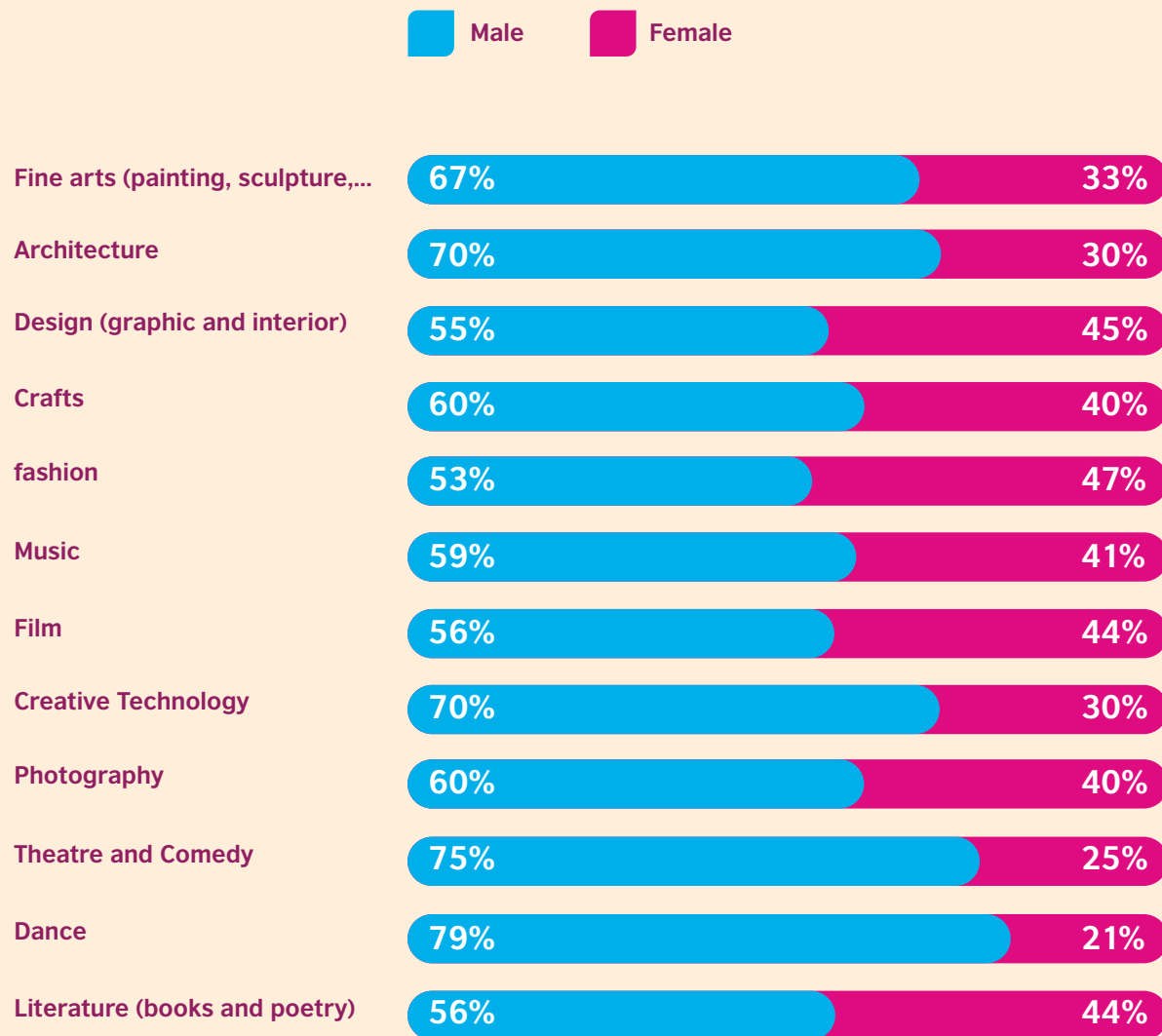
This has galvanised some female creatives, such as the pioneering visual arts collective 'Womxn Arts Collective, to set up groups to help female artists gain support and learn from each other and to try and boost the visibility and access to opportunities for women.

Whilst a targeted effort does seem to be being made to engage women, few are targeting those living with disabilities or from minority communities.

Across the 140 practitioners and organizations surveyed, only 16 reported specifically targeting people living with disabilities.

Sector Representation

Q Which creative sector do you / the organisation work in? (Multicode)



Total Telephone Survey Sample (Female N=50, Male N=90)

Women in the sector reported earning less than men overall.

Women are more likely to work part time (34% of women vs. 21% men). Almost twice as many women state earning under 500,000 RWF per year from their

work in the creative sector (30% of women compared to 16% of men). Of the 11 participants included in the survey earning over 10 million RWF per year, only one is female.

Gender norms around women’s roles and capabilities as creative thinkers and leaders continue to act as barriers for women to both enter and thrive in the sector.

This survey found women are working across all

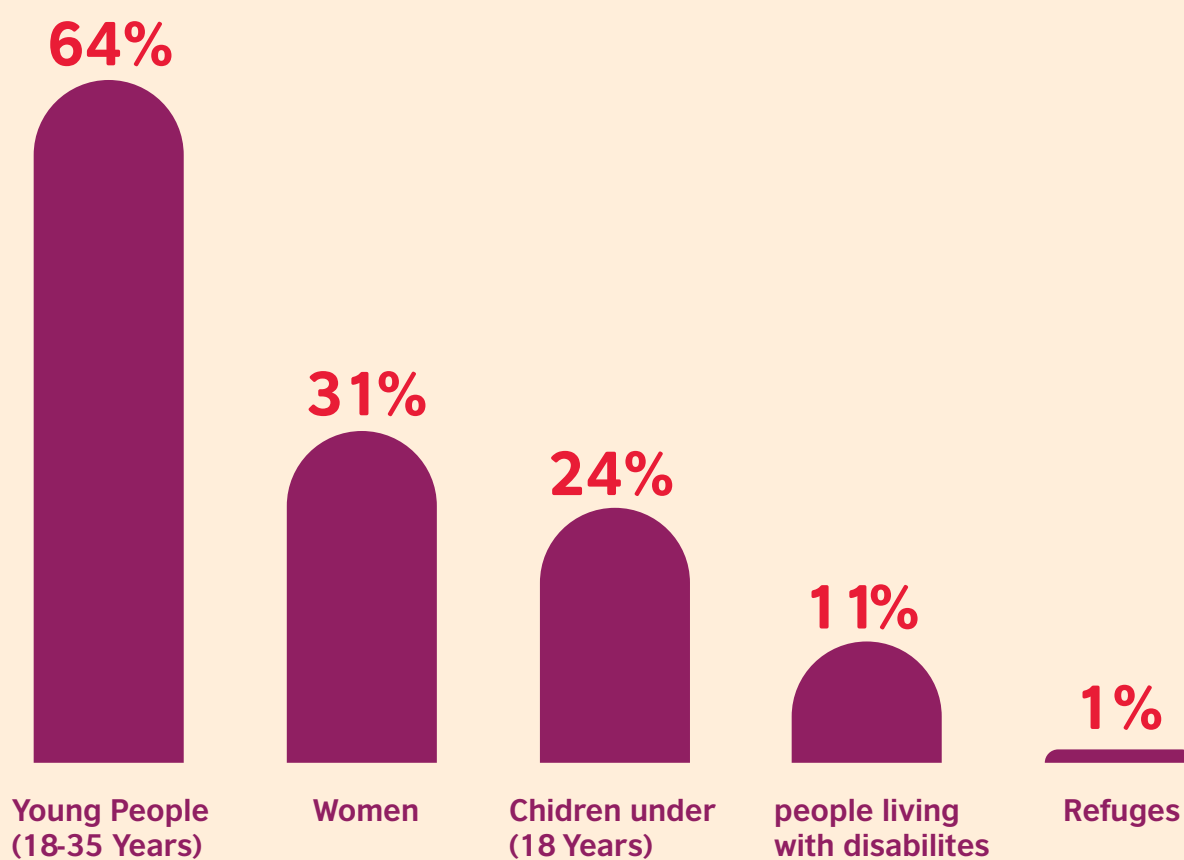
Gender norms around women’s abilities as thinkers, creators and leaders are still rife in Rwanda and, whilst norms are changing, the pressure to be primarily focused on being a wife and mother remain. Women reported finding it challenging to be ‘taken seriously’ and compete in a sector that is dominated by men. The perception that the creative sector is unserious as a profession, or even unsafe, act as additional barriers, particularly for young women entering the sector.

Women reported finding it more difficult to ‘find each other’ and make industry connections.

Female participants described how they often found it difficult to make connections and gain exposure

Audiences targeted

Q Who does your organisation target and work with? (Multicode)



Total Telephone Survey Sample (N=140)

Alongside ongoing stigma for people living with disabilities in Rwanda, one reason given for the lack of disability inclusion was financial. That the tight margins in this sector act as a barrier preventing all but the most

committed from opening access to those with additional / diverse needs. There was very little mention across the study of specific targeting of those who identify as LGBTQ+ or those from refugee communities.

5. Policies and representation

Participants reported that changes in Ministry alignment and representation over the years has caused confusion within the sector. Many have found it difficult to keep up to date with the changes to the creative and cultural sector Ministry alignment and the strategic priorities and strategies they have for the sector. These changes have resulted in a feeling from some that creative economy is not a strategic focus, and that the sector needs are not being prioritized or championed.

Where policies to protect artists exist, they are not always well-known or well-understood.

Whilst artists seem broadly aware of the existence of policies such as copyright, few felt that they had a clear understanding of how they work and are enforced. Because of this lack of awareness and understanding, artists felt that they had little to no recourse to protect visual and audio materials and simply accepted that they had few rights or protection for their work once it was out in the world, especially in the digital space.

None of the participants we spoke to were aware of supportive policies in the areas of tax or subsidies directed specifically at the creative and cultural sector.

76%

reported a desire for improved policy and laws to protect artists right Across those surveyed



Total telephone survey sample (N=140)

The study found that the level of representation and advocacy provided by existing sector bodies and appointed spokespeople is viewed as mixed.

With notable individual exceptions, governing bodies such as the Rwanda Arts Council and the Federations are not widely viewed as being equipped or positioned to be the “porte parole” for the industry.

Due to the process and condition in which it was created and the composition of the appointees, the Rwanda Arts Council and federations are mostly viewed as necessary administrators for licenses and permissions, rather than trusted advocates or supporters of the sector.

This lack of perceived strong and proactive representation has left some feeling that issues effecting the sector are not being championed or addressed – especially in the areas of new and digital media.

The opportunity and appetite for improved governance and policies across the sector is high.

There is an understanding that the better protected and secure the sector, the more appealing it is to investors and there will be more opportunities for growth and job creation. There is a call from the sector for decision makers and policy makers to step in and provide more support.



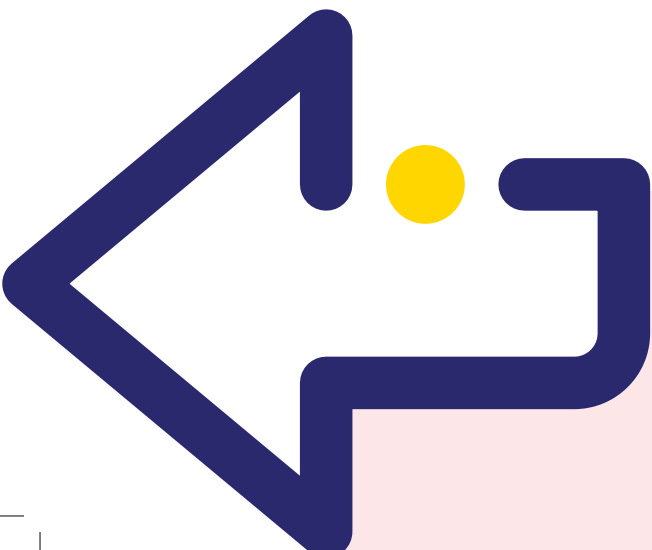


Key recommendations

- Generating income remains a major challenge for many in the creative and cultural sector. In order for the sector to grow and contribute to economic development, crucial support is required in both managing costs and in driving the competitiveness of creative outputs, domestically and internationally.
- This mapping has revealed that many individuals and organisations in the creative industry face challenges in making enough money to sustain and thrive. One of the main difficulties is the high cost of creating outputs, including the expenses of raw materials, time, and development.

Although, for some, donor funding from domestic and international organisations provides significant stimulus and opportunities, the sector must generate commercial income to be sustainable and to contribute to the wider economy.
- To achieve this, practitioners must keep costs affordable. Initiatives that provide support to the sector by increasing the affordability of raw materials, such as subsidies on imports, offering low/no-cost spaces for creative development and performance, and facilitating collective bargaining/buying power to help artists access the resources they need, would be welcomed by many.
- There is a lack of awareness and confidence in the structures and policies that exist to protect and advocate for the sector.
- For the creative and cultural sector to flourish, it is essential there is a secure and positive governance and policy framework that promotes the needs of the sector and safeguards artists' rights. However, this mapping found both confusion and a lack of awareness surrounding the structures and policies that exist, leading to a lack of security and confidence that the sector (and their rights as artists) are being protected and catered for.
- In order to sensitise the creative industry to the systems and policies that are in place to protect them, and to instil confidence in these structures, this report recommends that three steps need to be taken. Firstly, it is important to secure an appropriate 'home' at the Ministerial level. Secondly, policymakers and industry leaders should collaborate to regularly review and update policies that protect and support individuals and their outputs in this rapidly evolving sector. Finally, it is crucial to ensure that existing protections, such as copyright laws, are communicated to the creative community in a way that encourages understanding and uptake.
- There are several excellent training academies and schools in the creative and cultural sector currently operating in Rwanda. However, for Rwandan creatives and their work to successfully compete, both domestically and internationally, there is a need to enhance their capacity in certain areas.
- Although the creative sector has a wealth of talent and creativity, this study has found that many artists and creatives feel unprepared in terms of management and business skills. While technical training and education have improved in many areas, this lack of preparedness makes it challenging for them to access markets, reach audiences, and profit from their work.
- To address this, a key recommendation is that the sector considers how the creative industry can enhance its capacity in terms of creative industry management and business management skills.

This can be achieved by either building these skills within current creative practitioners or by attracting individuals with these skills to join the creative sector. Such efforts will play a significant role in the future economic development of the creative industry.



- In addition, whilst broadly talent and skills in the sector are growing, this research highlighted specific areas where gaps in technical skills are impeding creatives' ability to produce quality outputs and compete on a regional or international stage. Specific areas highlighted included postproduction in film and music and stage and lighting design in theatre and performance.

This is resulting in creative outputs that lack the finesse and polish for international markets and audiences.

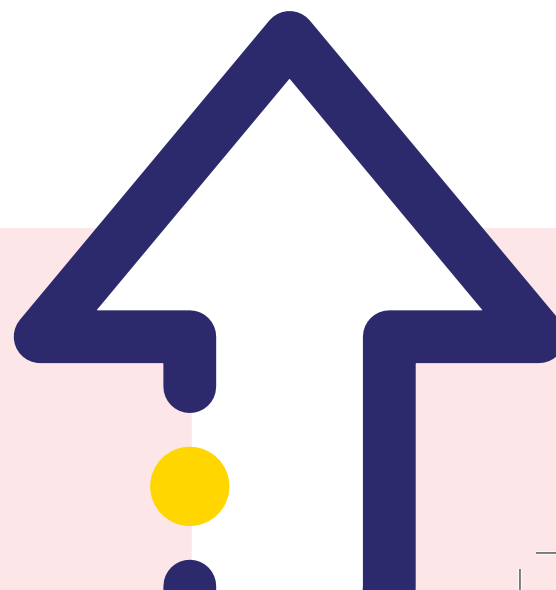
- Co-ordinating as a sector to identify these sector-wide skills gaps that are restricting the value of Rwandan-made creative outputs, and making coordinated efforts to fill these gaps would help to build more value within the sector and would also reduce reliance on international expertise.

This could be achieved through strategic institutional partnerships, exchanges and training opportunities.

- Dedicated venues that can host big and small scale productions are crucial to foster local talent and to build regional audiences for the arts. Investing in these 'creative hubs' is essential in growing both local talent and appreciative local audiences.
- As highlighted by this mapping, there are now numerous dedicated and high-quality creative hubs and spaces in Kigali. These spaces have been founded by Rwandan creatives and artists with the aim of providing opportunities for artists to showcase their work, connect with others, collaborate and develop their talents and skills.
- They play a crucial role in sustaining and developing the creative sector by offering appropriate spaces for artists to practice and perform, as well as nurturing the development of audiences and local markets.
- Providing financial and institutional support to these dedicated creative venues and facilitating networking and collaboration among them will be crucial in securing their success. Helping organisations to develop efficient and commercially viable operations will help ensure their sustainability and providing opportunities for collaboration and exchange among venues will promote consistency and quality in creative products
- and productions, which in turn will help these venues succeed and grow their audiences. This will require venue owners to work cooperatively at a sector level and for policymakers and sector leaders to consider how to nurture and promote Rwandan talent at all levels.



- The arts can play a powerful role in amplifying the voices of those traditionally excluded and marginalized by society. Whilst progress has been made in some areas, there is still much more that could be done to ensure the creative and cultural sector is a welcoming space for all.
- Although this mapping shows that the creative and cultural sector has not yet achieved a 50:50 gender balance, it is evident that organisations are making efforts to connect with and offer opportunities to female artists, creating spaces where their work can be valued across different sectors. However, this mapping also highlights the fact that other groups, such as those with disabilities are still largely excluded.
- Whilst the reasons for this exclusion are multifaceted and deeply tied to ingrained social beliefs and negative norms, it is widely evidenced that arts and creativity can play a powerful role in breaking down negative norms and changing mindsets. It will be important that sector leaders, practitioners, and funders strive to work together to ensure that the creative and cultural sector positively contributes to creating a more open and inclusive society and is itself a welcoming place for all.



A woman wearing a purple patterned headscarf and a dark blue t-shirt is seated in a black office chair, wearing a white VR headset. She is looking forward, and her hands are resting on a desk. In the background, other people are visible, including a man in a white shirt and another person in a blue shirt. The setting appears to be a classroom or a computer lab. A large purple banner with white text is overlaid at the bottom of the image.

Detailed findings

Creative and cultural sector overview

Background

Rwanda has a rich history of culture and traditional arts that are still very much alive and practised in society today.

Arts, creativity, and the promotion of culture has an established and valued role in supporting the socio-political and economic development of Rwanda and promoting unity, social cohesion and resolving conflict. During the country's reconstruction and reconciliation process after the 1994 Genocide against the Tutsi, arts and cultural initiatives played a valued role in the country's healing process and the political class of Rwanda continues to support and promote initiatives which strengthen and promote a sense of shared culture and heritage.

Increasingly the cultural and creative sector is being valued and leveraged as an important tool in promoting economic prosperity, especially in its contribution to sectors such as tourism and in creating opportunities for the young.

However, whilst valued, arts and creativity are not always prioritised. Investment in the arts has historically been low, both domestically and from foreign development and commercial organisations, and the focus on arts in mainstream education and investment in infrastructure is limited.

The arts - especially those areas of the sector associated with entertainment - continues to be seen as risky and unreliable in terms of being able to provide economic stability and career opportunities. Certainly, from the view of creatives, the creative and cultural sector in Rwanda still has some way to go until it reaches its full potential and value.

Political structures and systems

The Government of Rwanda is a signatory to the 2005 UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions. In 2015, the Government of Rwanda finalised a policy which outlined the role of culture and the arts in preserving and promoting Rwandan heritage and values. In line with

this, the policy set out to structure the creative and culture sector, resulting in the formation of a number of governing bodies and institutions namely, the Rwandan Society of Authors (RSAU) for collecting royalties; the Rwanda Cultural Heritage Academy (RCHA) (a reformed version of the Rwanda Academy of Language and Culture) which oversees museums, national language promotion and the creative industries sector; and The Rwanda Arts Council (RAC), which acts as an umbrella organisation for all of the artistic sector federations. Rwanda also has policies and strategies designed to support and protect the CCI sector.

Whilst a policy review is out of the scope of this research it is important to mention here some of the key policies and laws, namely the Protection of Intellectual Property Law amended 2018, Made in Rwanda Policy 2017, Private Sector Development and Youth Employment Strategy (PSDYES) 2024-2018



The Protection of Intellectual Property Law

was amended in 2018 after a policy review, with the aim of providing protection for creators of intellectual property, including industrial property rights and copyrights. This law safeguards a wide range of artistic and cultural activities through the copyright register, which offers protection for creative outputs across physical and digital domains such as music, literature and performance. The law also allows for the copyrighting of creative materials free of charge, while stipulating offences and penalties for different types of infringement.

The Made in Rwanda Policy 2017

was initiated in 2015 as a campaign to raise awareness about the advantages of purchasing products made in Rwanda through the Domestic Market Recapturing Strategy (DMRS). Since then, it has evolved into a comprehensive term for policies that promote the development of Rwanda's domestic market by enhancing the value chain led by the Ministry of Trade and Industry (MINICOM). The policy has five primary pillars, which include sector-specific strategies, reducing production costs, improving product quality, improving backward linkages and changing mindset. An instance of a specific sector strategy derived from Made in Rwanda is the 2022 Strategy for the Transformation of Textile, Apparel and Leather Sectors. The main goal of this strategy is to boost the production of high-quality garments for the local and international markets by enhancing access to affordable raw materials, promoting domestic manufacturing, increasing skills and capacity, and providing better finance access to small and medium-sized enterprises (SMEs).

The PSDYES 2024-2018

sets out a broad vision for creating value and competitiveness both domestically and abroad through an enhanced value chain across key sectors. Whilst not specifically focusing on the CCI as a stand-alone sector (although ICT and apparel are highlighted as key focus areas), this policy highlights, amongst other things, the role of quality, diverse education, specifically in TVET and self-employment skills important to nurturing talent in the CCI sector. These key tenants outlined in the PSDYES have since been carried through to initiatives and strategies to support youth and the CCI Sector such as the Ministry of Youth and Culture's 2021 Youth Centre Development Strategy which seeks to bring space and opportunities for young people to develop skills and opportunities – including those in the arts and culture space. At the time of conducting this research, arts and culture sat under the Ministry of National Unity and Civic Engagement (MINUBUMWE) presided over by Minister Jean-Damascène Bizimana. The affiliation of arts and culture with MINUBUMWE was relatively recent (as of March 2023) and followed quite a disruptive period over the last 10 years or so where arts and culture has, at various times, been housed under the Ministry of Sport, Ministry of Youth or various incarnations of the two. Since the completion of this study, Ministry alignment for the arts has changed again with the Office of the Prime Minister announcing on the 14th December 2023 that Arts Portfolio will now live under MINIYOUTH and Culture Heritage Portfolio will remain under MINUBUMWE¹.

1 As this development happened after completion of the research fieldwork and consultation process the findings of this report must be read in the context of Arts and Culture sitting under MINUBUMWE, which was true at the time.

From the perspective of creative sector actors this “lack of a permanent home”, as one cultural advocate put it, is seen as highly disruptive to the sector and has a negative effect on the extent to which those in the arts can operate and advocate for their needs. These disruptions are perceived to affect many improvement initiatives - for example, the 2015 cultural policy has recently been under review but that process is currently stalled given the changes within the Ministry. Whilst it is too early to say or comment on the stewardship MINUBUMWE will give to the arts, it is true that arts and culture appears to be just a small part of a much broader mandate.

The Rwandan Arts Council (RAC), as has been commented on in previous studies, and reflected in recent sector recommendations to the National Strategy for Transformation (NSTII), in its current form, is not widely viewed as being equipped or positioned to be the “porte parole” for the industry. Due to the process and condition in which it was created and composition of the appointees, the association and federations are mostly viewed as necessary administrators for licenses and permissions, rather than trusted advocates or supporters of the sector. During the research validation event, Ambassador Robert Masozera, Director General of the Rwanda Cultural Heritage Academy and Sandrine Umutoni, the Minister of Youth were invited to give their reflections on the study and share insight into the government and its partners’ strategy to reinforce the creative and cultural industry.

Ambassador Masozera outlined the government’s strategy for the CCI sector, which he divided into two categories - political/regulatory strategies and practical/technical strategies. From a political/regulatory perspective, Ambassador Masozera stressed the importance of the CCI sector being included in the NSTI. He explained how this has helped to raise awareness of the sector’s significance and its contribution to livelihoods, challenging the outdated notion that the arts are only a passion and not a profession. From a practical/technical perspective, he identified three main challenges facing the CCI sector - a lack of infrastructure, access to finance, and education.

He further explained that the government is committed to addressing these challenges through interventions such as the creation of major large-scale venues in Kigali and the development of Yego Centres (creative centres for youth) across the country. He ended his statement by saying that it is not the case that laws, policies and strategies do not exist to support the sector, but more needs to be done to sensitise and educate the sector to them.

Concerning the intersection of CCI and youth, Umutoni emphasized the significance of supporting and strengthening the CCI sector to create more economic opportunities for young people. She explained that the Ministry of Youth is committed to equipping young people with the necessary skills, vision, and confidence to showcase Rwandan creative products at a global level.

To do this, the Ministry collaborates with local and international institutions to identify areas where the economic empowerment of young people can be enhanced. Currently their key focus is on skills development and access to market.

Umutoni highlighted that the Ministry plays a crucial role in guiding and focusing these partners to ensure that initiatives and solutions presented to young people support and do not contradict each other.



Economic and funding context

Despite being a low-income country, Rwanda has shown rapid economic growth over recent years and considers the creative industry and the promotion of culture as one of the key vectors of this economic growth and job creation - especially for young people.

The “Visit Rwanda” campaign is one of the most visible ways this promotion of arts and culture is brought to life. Whilst the focus these initiatives bring to the creative economy is welcomed by the sector, there are elements to how this strategy is rolling out and shaping the sector that are not universally appreciated. This criticism focused primarily on how well disseminated it is to a) directly support a broad and diverse number of creatives and b) the extent to which the value ‘trickles down’ through the sector.

For example, the focus on bringing large-scale international events to Rwanda, and the development of an events and entertainment infrastructure to support this, has certainly been seen to add value to the industry. However, because of the ambition of this strategy and the size and scale of the venues and infrastructure being invested in (such as BK Arena and the Convention Centre) they are not appropriate or accessible to the vast majority of local artists and entertainers.

There is a feeling amongst some that investment at this end of the spectrum has come at the cost of more ‘mid-level’ venues and spaces, resulting in a lack of the accessible spaces (and audiences) local artists need to grow and nurture their talent.

Tied to this is a frustration from local creatives that whilst this new infrastructure is enticing international events (such as CHOGM in 2022), local artists and creatives are being passed over for headline events and opportunities by international artists who are being brought into the country to play at these events instead.

Despite its growth and ambition, the Rwandan economy is still heavily reliant on international development and this reliance is particularly strong in the creative and cultural sector, especially in terms of supporting contemporary arts to contribute towards development goals.

Therefore, international donors and development organisations continue to be crucial in supporting the creative sector. Those found to be of particular note and influence include those associated with European governments - particularly the French, German, and Swiss.

Whilst this funding landscape continues to be quite broad in focus, spanning a range of events, festivals, workshops and exhibitions across domains, there does appear to be a desire from the donor community (and the creative sector) to provide more strategic, systems-strengthening support, focused on creative economy outcomes rather than - as one member of the donor community put it to us - “art appreciation”.

Examples of this can be found in the recent launch of the Swiss Corporation’s PAC (Programme d’Appui Culture) initiative in the Great Lake region. This program aims to support the development of the arts and culture sector in a more sustainable and long-term way through the strengthening of the technical capacities of practitioners and institutions, increasing production value of ‘Made in Rwanda’ creative outputs, improving the distribution and mobility of artists (e.g., providing more opportunities for rural artists and arts opportunities in rural areas), alongside raising awareness and advocacy around challenges within the sector.

Similarly, the German Development Cooperation (GIZ) has developed a very focused strategy to support the film and audio-visual sector through the ‘Education and Training of Media Professionals in Africa’ project under their digital economy thematic pillar. This new strategy has a tight focus on supporting job creation across film and cinema by providing training and capacity-strengthening support (especially in technical areas), institutional support to structures within Rwanda’s governing structures (e.g., the Film Office at RDB) and specific project and inclusivity support and programs.





Trends and influential creative and cultural actors

Performing Arts

As reflected in the mapping, performance arts, drawing on a rich heritage of tradition, are still very much alive and part of culture and society today.

Traditional dance still plays an important central role in weddings, funerals and community and national events. The Rwanda National Ballet (Urukerereza National Ballet) has always been housed under Ministries in charge of culture. It is well structured, with permanent staff managing and training the ballet, and is an example of the value traditional dance still holds. Across the country, traditional dance troupes can be found in schools and community clubs and are a key feature in the tourism and events sector.

Likewise, contemporary dance, which in the western model can often be considered elitist and inaccessible, is a hugely popular and widely practised art form, particularly (as evidenced by this mapping) with young men. New traditional dance troupes with a contemporary touch (such as Intayaberana, Inganzo Ngari and Inyamibwa) gained particular traction a few years ago in the nightclubs of Nyamirambo in Kigali, becoming popular with youth for the way they 'rebirthed' the traditional dance motifs and styles. Alongside this street dance, more formal contemporary dance also remains highly popular, especially in Kigali, driven in a big part by organisations such as EANT (East African Night of Tolerance) and the Amizero Company founded by Wesley Ruzibiza (internationally renowned choreographer and Co-Director of Ecole des Sables). Through the network EANT has built up, both regionally and internationally, over the last 10 years

EANT has successfully hosted an annual contemporary international dance festival in Kigali, which is not only very popular locally, but acts as a catalyst for training and exchange and has a proven track record in producing high quality productions that go on to tour internationally for long periods of time. More recently, the Ubumuntu Festival, a dance and theatre festival produced by Mashirika Performing Arts (founded by Hope Azeda) has also grown in popularity.



Case Study

EANT / Amizero Company



Amizero Performance Photograph used with permission of the artists Wesley Ruzibiza, Photo by Christel Arras

Founded in 2012 by Wesley Ruzibiza, EANT / Amizero Company is a contemporary dance company that, alongside performing and touring offers:

- training of performers
- social programs to raise visibility of dance and theatre.
- an annual dance festival
- regional connections program across the Great Lakes regions.

Through its links with Ecole de Sables in Senegal, and institutions in Europe and the Great Lakes region, Amizero is one of the most successful examples of an established creative network in Rwanda.

Challenges

Consistent and appropriate funding continues to be one of the company's greatest challenges especially in funding creative development.

Goals and Opportunities

Amizero is passionate about creating and supporting a local market for the arts – building local audiences and creating a consistent flow of quality productions across the region.

Key to achieving this is the creation of purpose built permanent spaces that allow for the development of institutional networks and grows and audience and market for these artforms.

As with dance, theatre also remains highly popular both in traditional and contemporary forms. Traditional community theatre is used frequently by the development sector and government in the form of 'Theatre for Development'. Whilst this varies in quality (and the extent to which it is produced and scripted), it is a very popular and well-received, particularly in rural communities, both in the form of face-to-face and radio productions. Organisations such as Urunana, Mashirika, and Arts Ubuhazi are very active and respected in communities for this work and indeed many of Rwanda's most successful actors and performers today (e.g., those starring in commercial television and film such as Zacu TV productions) started their career in community theatre groups such as these.

Contemporary theatre (or independent theatre) plays a very interesting role in Rwanda's arts and creative scene.

Historically, there was a key focus on classical theatre and theatrical education in Rwanda which, alongside some very talented diaspora returning to the country such as Carole Karemera, founder of Ishyo Arts centre, created a generation of playwrights, directors, and producers who both set up theatre companies and were successful in exporting Rwanda theatre internationally. However, the infrastructure required to perform contemporary theatre has never really been established in Rwanda. This has led to a situation where independent theatre can predominantly now be considered an export. An example of this is the play 'Hate Radio', based on the 1994 RTLM radio, that successfully toured Europe whilst only performing four nights in Rwanda due to its heavy production cost

and the lack of appropriate infrastructure. Likewise, the successful production 'The East African Bolero', by Wesley Ruzibiza, was created in Rwanda and has been touring in Europe since 2017 but was only shown in Rwanda this year (2023) when there was finally a venue that was able to provide suitable infrastructure (L'Espace).

Comedy is a relatively new scene in Rwanda but one that has become popular with younger audiences across both live shows and in digital spaces and appears to be successfully attracting a regular growing (and paying) domestic audience. The comedy scene was initially kick-started in 2010 by the 'Comedy Knights' a stand-up show founded by Micheal Sengazi, Jerome Migisha Ndamage, and Arthur Nkusi. Over the years this evolved into a TV show 'The Comedy Factory' which aired on Rwandan National TV and has influenced a generation of comedians and comedy lovers.

Today, several successful comedy shows are running in Rwanda. 'Seka Live', founded by Arthur Nkusi is a monthly comedy night running in Kigali which attracts a (primarily anglophone) set of local and international comedians. 'GEN-Z', is a twice-monthly (Kinyarwanda) comedy night at Camp Kigali set up by Merci Ndaruhutse (a graduate of the Art Ubuhanzi program) and showcases local Rwandan talent. Regionally, 'Caravane du Rire', is a comedy festival that has been touring Burundi, DRC, and Rwanda since 2017, aiming to connect comedians from across the region to entertain and facilitate positive dialogue across borders. This year 'Caravane du Rire' is looking to feature predominantly female talent.



Influential creative and cultural actors

Organisation	Description
EANT / Amizero Company	Contemporary dance company and annual international dance festival founded by Wesley Ruzibiza. Amizero has trained a large number of regional dancers (Rwanda, Congo, Burundi, Uganda, Tanzania, Kenya) and has established a network that offers opportunity for formal training in Europe and Ecole de Sables in Senegal for the past 10 years.
Caravane du Rire	Regional comedy festival that tours annually across the Great Lakes region, founded by Micheal Sengazi, Babou Joe and Herve Kimenyi. It aims to create a platform and a network of comedy practitioners in the region and internationally, growing the comedy industry through masterclass to help emerging comedians.
Urukerereza National Ballet	Rwanda national ballet company performing traditional Rwandan dance domestically and internationally.
L'Espace	Kigali based creative cultural hub and arts space founded by Dida Nibagwire and Wesley Ruzibiza. L'ESPACE was established as a response to the lack of physical medium space dedicated specifically to performing art and visual arts. It has evolved into a thriving centre for artistic expression, offering a diverse range of monthly events encompassing dance, music, theatre, film screenings, and visual arts exhibitions. Additionally, it plays host to festivals, residencies, and training programs.
Mashirika Performing Arts	Performing arts and theatre group founded by Hope Azeda Since 1997, Mashirika has contributed to the nurturing of many talented individuals that went on to become national and international superstars, from musicians to actors. It also played a huge role in the growth of Theatre for Development working on numerous projects that gave a platform to artists for stage and radio drama. Mashirika has always been one of the go-to-places if you want to start your artistic career in Rwanda
Art Rwanda-Ubuhanzirorganisation	National project implemented by the Imbutu Foundation in collaboration with the Ministry of Youth to find and support young creatives across 9 artists categories with training and financial support.
Ishyo Arts Centre	Performing arts and theatre group founded by Carole Karemera. Ishyo has also acted as a major platform for artists since 2007 and had Rwanda's first theatre space (closed in 2012). Ishyo's long-running work for young audiences includes a Bibliobus that toured Rwanda delivering books to children. Their Children's festival, Kina, is the first and only theatre festival for children in Rwanda. Ishyo has been part of establishing culture policy development programs and freedom of expression programs with national and international networks of like-minded organisations.

Ingoma nshya

Ingoma nshya (the new drum) is an all female drummers group founded by Odile Gakire Katese. They were the first women drummers troupe that challenged the prevailing cultural norm that women were not allowed to drum in Rwandan culture. Ingoma nshya has toured the world showcasing Rwandan drumming culture with a contemporary twist. Their project, One Drum Per Girl, aims to teach girls in schools across the country how to use arts as a means of expression and to open doors for them to the arts and culture sector.

Rwanda Arts Initiative

Rwanda Arts Initiative (RAI) is an artists' platform created in 2012 by Dorcy Rugamba a Rwandan artist based in Belgium. It aims to support the professionalisation of the sector and is an incubation space and co-shared space that offers working and artist residency space to local and international artists. RAI offers support in project management, productions, and networking.

Seka Live

SEKA LIVE is a monthly comedy show founded by Arthur Nkusi and Budandi Nice which attracts around 800 people per show. It has hosted big names in the comedy industry like Daliso Chaponda and Eric Omondi and also hosts big names in the Rwandan comedy industry like Rusine, Michael Sengazi etc. It also serves as a platform for new talent featuring young and emerging talents as their first acts.

GEN-Z

GEN-Z comedy show is a bimonthly show hosted by Ndungutse Merci, a graduate of Art Ubuhanzi, this show is exclusively for the young generation of comedians and has gained popularity since its creation with huge attendances.

Audio-visual

Film, Music

Whilst the audio-visual sector is growing in popularity and focus, it remains a challenging sector not least because of the competitive nature of the industry and the high-quality production standards it demands.

The film industry in Rwanda is very young but has grown rapidly over the past 10 years both in terms of the local market and also international independent film. Most of the filmmakers in Rwanda are self-taught but recently there have been a significant number of opportunities for training via short courses that strengthen filmmakers' capacity in directing, script writing, cinematography etc. Cooperation Swiss offered scholarships in 2015 to two Rwandan aspiring filmmakers (the founders of Imitana production Mbabazi Philbert and Samuel Ishimwe) to study cinema in a prestigious film school in Geneva; they are now prominent figures in the growth of the sector and are very active in sharing their knowledge through training. Whilst Rwanda has had a national television broadcaster since 1992, it was not until the early 2010s, when local production houses like Zacu TV were born and began to produce a large volume of local content from TV series to feature films, that the local market started to gain popularity. Last year, Zacu TV was bought by pan-African digital television network Canal + (who have developed a model of buying local production houses across Africa to produce local original content) subsequently enabling them to produce even more Kinyarwanda content. Although the budgets and therefore production quality remain relatively low compared to international standards, the 'telenovela' style content is massively well-liked and the actors who feature in these shows are very famous and popular.

In parallel, independent cinema has also been significantly growing. In the early 2010s acclaimed director Kivu Ruhorahoza's film, *Matiere Grise/ Grey Matter*, premiered at the Tribeca film festival, launching Rwandan film onto the international stage. This opened

the door for a number of young filmmakers who, inspired by this, went on to become the current leaders of the industry such as Joel Karekezi who won the Etalon d'Or at FESPACO in the presence of HE President Paul Kagame. This attention (along with a focus on film from the development sector, namely GIZ) helped draw the Government's attention to the cinema industry, leading to the creation of the Rwanda Film Office housed in RDB. Since 2015, there has been at least one Rwandan film a year at film festivals such as Berlinale, Locarno, Rotterdam etc. These showcases can either be supported by funders and donors or instigated by artists themselves.



Case Study

Zacu Entertainment

ZACU is a production and distribution house founded in 2014 and recently bought by Canal + to distribute Kinyarwanda language tv and movies across Rwanda. Zacu has played a significant role in shaping the local film industry, opening it up to a wider Kinyarwanda speaking audiences. Alongside digital channels they are among the biggest suppliers of film content to the Rwanda Broadcasting Agency.

Challenges

The pool of technical expertise and talent in Rwanda

remains small, which can impact not only productivity but diversity of creative output.

Training in technical and commercial skills would help commercial organisations such as Zacu to expand the talent pool they work with and improve output quality.

Goals and Opportunities

Zacu has been experimenting with launching films into cinemas in Rwanda. Whilst so far audience appetite has been low – they are looking to grow audiences in this space.

Musically, like most places in the world, Rwanda has a highly-diffused mix of contemporary and traditional popular music with genres ranging from traditional church and gospel music to modern pop and AfroBeats.

At the more commercial 'pop' end of the spectrum, the scene is dominated by a few big local names such as Bruce Melody, The Ben and Butera Knowless and the young 'superstar generation' such as Bwiza, Alyn Sano and Chriss Eazy.

Less commercial, but popular with Kigali youth, is the uniquely Rwandan 'Kinyatrap' scene with artists such as Ish Kevin, Bushali and the Green Ferry Collective who have drawn on the rhythms and cadences of traditional Rwandan poetry and reimagined it through the sounds of modern rap.

Traditional music, and the performance of traditional instruments such as the Inanga, also remain popular and are kept relevant by performers such as Esther Uwayo or Patient Akayezu. Indeed, thanks to the compulsory teaching of these traditional instruments at the Rwanda Creative Arts and Music School (described by the head of the school as being in response to the generic commercialism and dominant afro-beat sound popular across the region), these traditional sounds and instruments are receiving renewed interest.

The sector has seen a rise in young artists fusing these traditional songs and sounds with more modern themes and styles in an effort to create unique 'Rwandan' contemporary sounds. These include Late Yvan Buravan, Micheal Makembe, Ruti Joel, Jules Sentore and Kayonga Otis.

With a plethora of local and national radio, digital channels (primarily YouTube) and TV, there is no shortage of distribution platforms for music. The challenge artists shared is the extent to which these distribution channels generate income.

Radio and digital do not provide any income generation in Rwanda as there is no history or mechanism for artists to be paid for content distributed via radio (save an unsuccessful attempt at performing rights remuneration attempted by RSAU years ago) and, likewise, digital platforms do not pay (or pay insignificantly small amounts) for domestic plays (there is no advertising on YouTube in Rwanda). To counter this, we heard that some artists are trying to generate income from digital plays by hosting content from the US or Europe, however, we were unable to glean further information as to the success of this strategy.

The main income-generating methods for musicians remains live public and private performances alongside commercial endorsements.

One of the greatest influences on modern music trends is that of the Rwanda Creative Arts and Music School and its alumni.

The Rwandan Creative Arts and Music School is a Government funded TVET academy founded by Rwandan musician Jaques Murigande known more popularly by his performance name 'Popo'. Over the last 10 years it has dramatically improved the quality and standard of musical education in Rwanda. Recruiting around 150 students a year through a nationwide audition process, the school not only teaches an academically rigorous musical education, but also the values of performance, traditional Rwanda music and modern professional skills such as business management and copyright law.

Notable alumni from the school include performers and producers such as Ariel Ways, Okkama, Kenny Sol, Symphony, Micheal Makembe, Dawidi, Chrisy Neat Pro, Danny Nanone, Igor Mabano, Yverry, and Pappy Israel. The improved standards of musical performance, and interest in traditional music and instruments, is to a great extent responsible for producing a new generation of musicians who are experimenting with new fusion sounds and raising the bar for live performance.

Driven by the requirement to be sustainable the school has long sought private investment, and in recent years has built out its offering to include an international-standard recording studio which they routinely hire out to local and international artists.

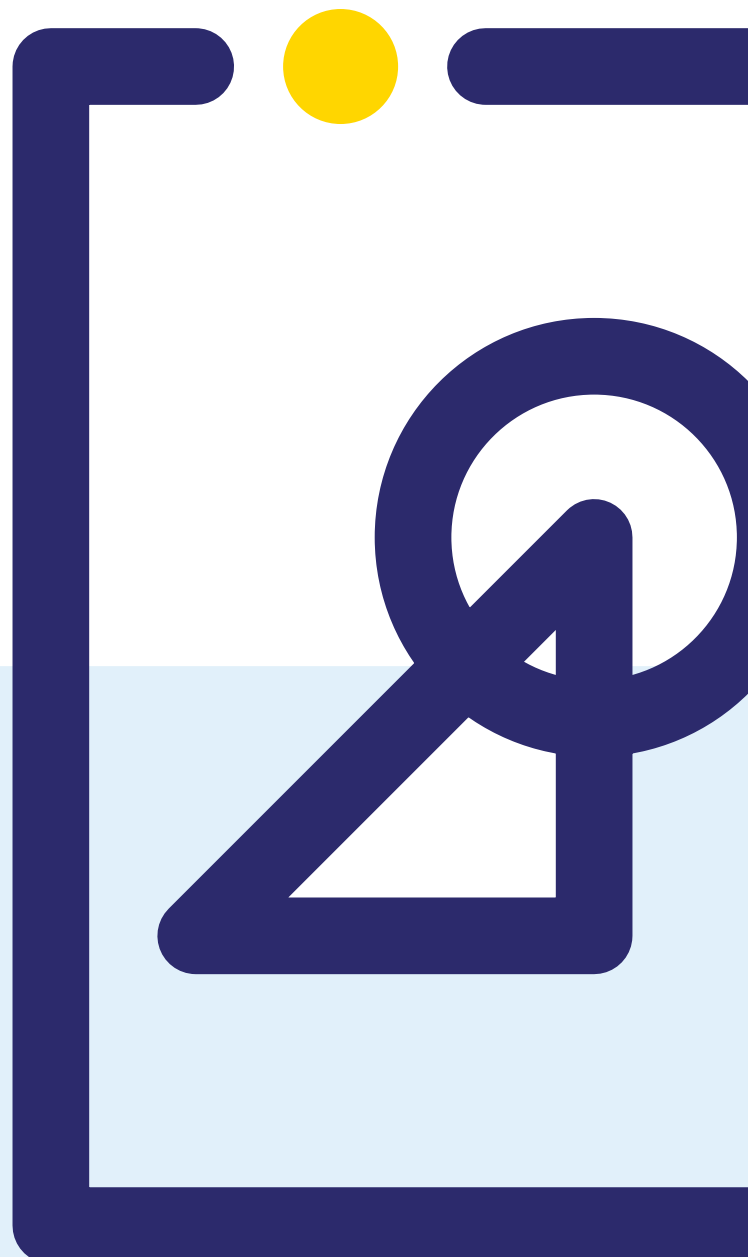
They are several months away from the completion of a purpose-built arts venue, which will host a range of musical and theatrical productions and act as one of the only purpose-build performing arts venues outside of Kigali. It is also introducing new elements to its curriculum including film and theatre production.

Whilst music festivals provide an important space for local and regional artists to meet and connect, attempts to establish festivals in Rwanda have had only relatively muted success for a wide range of reasons from commercial issues to the challenges of COVID-19. Kigali Up has been the largest urban music festival but issues with costs and talent management have limited its success.

Other festivals such as Volcano Fest in Musanze and Kivu Fest in Gisenyi bring together local and some regional artists but have not yet established themselves for a regional audience.

The festival that has had the greatest positive impact on the Rwandan music scene has interestingly been the Amani festival in Goma, DRC. The festival not only receives many Rwandan artists, giving them an opportunity to perform on a regional stage, but due to its closeness to Rwanda allows big international artists such as Nenka, Awandi, and Ismael Lo to perform in Rwanda as a warm-up to the festival.

Whilst noted earlier, the focus on bringing big international events to Rwanda whilst attracting regional and international musicians has not provided much of a platform for upcoming artists, it is notable that TRACE TV recently hosted their first TRACE music awards and festival in Kigali this year and, in partnership with Visit Rwanda, have introduced a category specifically to showcase Rwandan artists which could prove to be an interesting opportunity for local talent.

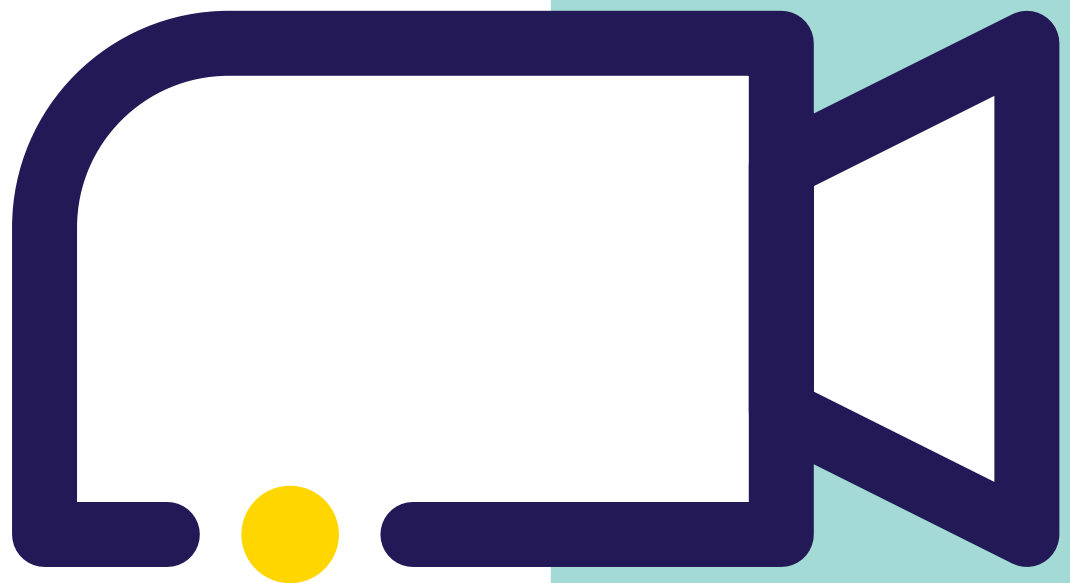


Influential creative and cultural actors

Organisation	Description
Rwanda Creative Arts and Music School	The Rwanda Creative Arts and Music School is the first music school in Rwanda that gives formal studies in music as part of the Technical and Vocational Education and Training schools (TVET). The school serves to train young musicians and prepare them for professional careers. It was founded by Rwandan Musician Jacques Murigande (Mighty Popo)
Kina Music	Kina is among the first and most successful record label and production house in Rwanda founded by music producer Clement Ishimwe, it has produced and managed a huge numbers popular artists Like Knowless, Nel Ngabo, Christopher, Dream Boys etc. Kina music's contribution in the growth of the music industry is undeniable.
Green Ferry	Green Ferry record label is the initiator of the Kinyatrap which is the Rwandan version of trap music, started in 2012, Dr Njangi the founder and a music producer made the first Kinyatrap beat in 2016, since then the genre has become very popular. Popular Kinyatrap artists like Bushali Ish Kevi, B- Tray are all on the Green Ferry record label, whilst the label also produces other artists such as OneKey, Kaya Byinshii and female hip hop artist Angel Umutoni.
Africa In Colours	Africa in Colours is a pan-African platform based in Rwanda aiming to support African creative entrepreneurs to work together, trade and do business together.
Imitana Productions	Imitana is film production company founded by award winning filmmakers Samuel Ishimwe and Philbert Mbabazi. They offer training in filmmaking and have produced around 10 short films for emerging filmmakers under their "power in contraight" program, most of which went on to win awards in international film festivals.
Iyugi Productions	Iyugi productions is a film production that has produced internationally acclaimed films like Father's Day by Kivu le Ruhorahoza that premiered in Berlinale Encounter competition in 2022 and Le Silence Des Mots by Gael Faye and Micheal Szatanke that was aired on Arte France.
Zacu TV	ZACU is a production and distribution house in Rwanda that was founded in 2017. Zacu has changed the local cinema industry since its creation by producing films and series in Kinyarwanda thereby accessible to wider audiences. They produced popular TV shows like Seburikoko and City Maid and they are among the biggest suppliers of film content to the Rwanda Broadcasting Agency. They recently started airing on Canal +

Kiruri Films

Kiruri film is run by passionate filmmakers Ganza Moise, Deve SHema and Remy Ryumugabe with the aim to produce and distribute a diverse genre of cinema. They have distributed theirs and fellow artist's work in more than 20 film festivals such as Cascade Festival, Internationale Kurzfilmtage Winterthur and Durban International film festival.



Visual Arts and Design

Crafts, Fashion, Fine Art

Visual arts and design appears to be the largest active domain within the creative and cultural industries with 89% of those contacted through the mapping study describing being engaged in at least one of these sub-sectors.

Rwanda has a strong history in traditional crafts from traditional basketry and agaseke², to ceramics and imugongo³. In recent years, the crafts sector has undoubtedly benefited from the strides Rwanda has made in both bolstering and upscaling the tourism markets - a trend that can be visibly demonstrated by the number of craft shops and galleries across Rwanda - and from the exposure brought in by activities such as the Made in Rwanda and Visit Rwanda initiatives.

At the premium end of the craft sector, retailers such as Gahaya Links (founded by Joy Ndunguste and Janet Nkubana) have gained international success through high-end agaseke, crafts and fashion exported around the world – even featuring in Macy's in the US. Following in their

footsteps are a number of young designers and artisans who are targeting more upscale consumers and, as with many of the sectors we have explored, taking traditional Rwandan crafts and motifs and modernising them for a new generation.

A key facet of these premium artisan retailers is a focus on 'ethical production' with ethical sourcing and positive gender-rights values a key part of their model and marketing – as seen with many of the more successful craft brands such as Aziz and the Nyamirambo Women's Centre.



2
Traditional Rwandan woven basket.

3
Traditional Rwandan wall art typically using bold geometric shapes.

Access to markets through digital commerce is becoming increasingly important in this sector with organisations such as AIC (Africa in Colours) and the RDB's Made in Rwanda brand trialling e-commerce stores to try and reach new digital markets.

Fashion is also certainly an area that is receiving particular focus and attention with a class of established designers now aiming to reach out to premium international markets and a flurry of new designers and boutiques targeting the small but growing domestic middle class.

Some of the more established fashion houses, which have become flagship brands for Rwandan creativity including labels such as Haute Baso, House of Tayo, and Moshions are now being joined by a host of emerging young designers who are creating new voices in the industry. These include Novelty Fashion by Maison Inkindi, Koni clothing, Brand 8, Matheo, and Shema Gaetan.

Rwanda's first annual fashion week was hosted in 2015 initiated by the fashion and design collective 'Collective Rwanda', whose founding members include some of the most established and influential fashion houses in Rwanda (Linda Mukangoga of Haute Baso, Sonia Mugabo, Teta Isibo of Inzuki designs and Matthew Rugamba of House of Tayo). In 2022 the event featured over 16 designers from Rwanda, Africa, the Caribbean, and the UK and was supported by the British Council.

Alongside holding fashion shows, there is a growing trend for fashion to be a key feature within other creative outlets. The recent AIC (Africa in Colours) festival placed a focus on blending music, fashion, and theatre with elaborately designed catwalks set to music.

As with crafts, there appear to be increasing endeavours to open up access to markets through digital avenues. The big fashion brands such as

Moshions have invested in online marketplaces and organisations such as AIC are making fashion a key feature of their e-commerce sites.

Regionally, there are efforts to establish outward-facing e-commerce networks such as the fashionomicsafrica.org platform designed by CCHub.



Case Study

Womxn Artist Rwanda



Womxn Artists Rwanda Exhibition, Photograph used with permission of the artist Kakizi Jemima, Photo by Dushric

Created to increase the visibility of female artists, Womxn Artists Rwanda organises all- women exhibitions across the country, each followed with a discussion on the challenges women face in the industry and how to bridge the gaps. It was founded in 2020 by artists Crista Uwase, Kakizi Jemima, Pearl Karungi, Odile Uwera, Hortense Kamikazi following an exhibition organised by the Goethe Institute which curated 34 Rwandan female artists in an exhibition at the Rwandan Museum.

After 'finding each other' through this exhibition they decided that they needed to come together to seek out and share opportunities and support each other in the sector.

Challenges

Whilst talented artists, they have little experience in the more commercial side of running a creative business.

Support, training and developing experience in how to successfully monetise their work is needed by many women in the sector.

Goals and Opportunities

Since Womxn Artists Rwanda was founded, opportunities have opened up for many female artists not only to showcase their work with other women – but also in solo exhibitions and in exhibitions with men.

In the fine arts space, Rwandan talent and creativity also seems to be getting increasing exposure and acclaim.

Rwanda has a tradition of fine art and artists reaching back to the 1950s with the formation of the Nyundo Arts School (that also housed the Rwanda Arts and Music School when it was created before it moved to Muhanga).

However, the market for fine arts, and the spaces and places to exhibit them, has until quite recently, severely limited the sector. Professional artists were producing very traditional themed works inspired by classical Rwandan culture and these were predominantly found for sale in the tourism sector (hotels, tourists etc) – a theme that continues to dominate the space.

Over the last 20 years or so however, prominent contemporary art figures have emerged and re-visioned the sector. Artists like Epa Binamungu and Bushayija Pascal began experimenting with more modern, sophisticated styles and themes – inspiring a generation of contemporary fine artists.

In 2010, brothers Emmanuel and Innocent Nkuranga, brought much attention to the fine art sector nationally and internationally through their impressive contemporary works and the founding of their gallery Inema Arts Centre. Inema played a significant role in bringing modern Rwandan art to a national and international audience and inspiring the trend towards dedicated and 'slick' gallery spaces in Kigali.

Today there are a number of successful and influential galleries such as Choose Kigali (founded by the original Inema team), L'Espace, Indiba Arts, Invuka Arts, Niyo Arts Gallery and Inshuti Arts Gallery, which offer a more considered and curated experience. These spaces

are supporting a now a vibrant generation of young visual contemporary artists who are receiving attention nationally and internationally. Artists such as Izere Atoine, Moses Izabiriza, Kakizi Jemima, Cedric Mizero, Mackson Maximilien, John Claude Nizeyimana are producing works which have gained acclaim (and are selling) on international stages.

The government also has invested in showcasing fine art through museums such as the former Presidential Palace in Kanombe that was recently transformed into the Rwandan contemporary Art Museum, the modern King Palace in Nyanza has long hosted permanent and temporary exhibition by Rwandan and international Artists.

Women, who have traditionally been excluded in the fine arts space are becoming increasingly prominent and visible in their own right, helped in no small part by the formation of women's collectives - such as Womxn Artist Rwanda (founded by Kakizi Jemima following a group exhibition titled "Messages of Rwandan Womxn Artists: #EachForEqual" curated by Crista Uwase together with Rwanda Contemporary Art Museum and Goethe Institute).



Influential creative and cultural actors

Organisation	Description
CollectiveRW (CRW)	Collective of established and influential fashion houses who host Kigali Fashion week. CollectiveRW (CRW) was founded in 2015 by Rwandan established fashion designers, to empower emerging designers and promote a dynamic creative sector.
Rwanda Clothing	Created in 2012 by Joselyne Umutoniwase, Rwanda Clothing is a fashion and home-decor boutique based in Kigali. It is known for dressing guests of Visit Rwanda events like the Kwita Izina naming last year.
Moshions and Rwanda Hub	Started by Moses Turahirwa a Rwandan renowned fashion designer, Moshions is of the most popular fashion houses in Kigali, known for dressing government officials, corporate heads, and artists alike and has successfully built up an international audience. After completing a master's degree in Italy, Moses created Rwanda Hub, an incubator designed to guide aspiring designers on how to bring an 'idea to life'. The Rwanda Hub has contributed to skills building for local creative entrepreneurs.
Womxn Artist Rwanda	Created to increase the visibility of female artists, Womxn Artists Rwanda organises all women exhibitions around the country followed with discussion around challenges women face in the industry and how to bridge the gaps. It was founded by artists Crista Uwase, Kakizi Jemima, Pearl Karungi, Odile Uwera, Hortense Kamikazi
Impundu Art Center	Arts platform founded by Kakizi Jemima to curate exhibitions locally and internationally putting women in the center.
Indiba Arts Gallery	Indiba Arts Space is a hub for artists and art lovers, a gallery come workshop space created by the visual artist Willy Karekezi.
Niyo Arts Gallery	Niyo Arts is a gallery and workspace based in Kigali that houses 17 artists from the region. Niyo allocates 40% of their profit to support children and women living in poverty.
Rwanda Contemporary Art Museum	Recently created, this space used to be the Presidential Palace Museum. It was created to showcase contemporary artists from Rwanda and abroad. They support the fusion of traditional and modern creative expression.
Rwanda Academy for Cultural Heritage	Established in 2020 merging 3 institutions (Rwanda Academy of Language and Culture, Institute of National Museums of Rwanda and Rwanda Archives and library Services) with the mission to "preserve national heritage and safeguard the national language, the culture and its values as a foundation of national unity and dignity"

Literature

Books and Poetry

As reflected by the mapping study, the publishing and literature sector in Rwanda remains small (only 13% of our sample were engaged in literature). However, whilst the tradition for written literature is not strong, oral storytelling culture through poems, stories and tales has a rich heritage and strides have been made to encourage reading and literature, especially amongst children.

In terms of publishing, there are several publishers in Rwanda that cater to various media and subjects. These include Editions Bakame, Rwanda's first publishing house to produce children's and youth literature; Ubuntu Publishers, which promotes the reading and writing culture in Rwanda at an early age; Illume Editions, a bespoke publishing house focusing on storytelling through photography; and Imagine We Publishers, which publishes books by Rwandan authors. Illume Editions, a bespoke publishing house focusing on storytelling through photography.

Illume Editions is the sister company of Illume Creative Studio, a Communications Agency and Creative Studio founded in Kigali in 2010. Over the last 13 years Illume has worked closely with creatives in the sector to develop and professionalise "brand storytelling" working with some of the region's biggest brands such as Google Africa, Mastercard Foundation, MTN Rwanda, Meta, Carnegie Mellon University Africa, and more. Storytelling is at the core of Illume's brand.

With Illume Editions, African storytelling through striking imagery is at the core of what the company is about. Illume Editions' first publication in 2017 was "This is Rwanda", an aerial photography journey through the entire country, authored by Gael Vande weghe and Philippe Nyirimihigo. The photos were taken with cameras from helicopters flying over the country's most stunning terrains and the book's second edition was launched in 2022. The second publication in 2021 "Strong Women Behind A Strong Coffee" authored by Denyse Uwera, tells the story of Rwanda coffee producer 'Rwashoscco' through powerful photographs and authentic storytelling.

In 2023, Illume became a successful grantee of the ACP-EU Ignite Culture programme (Eastern Africa's largest grant fund for creative and cultural industries) to develop their Women Storytellers programme, a 5-month training, development and networking opportunity for women storytellers who are photographers, film-makers, writers, podcasters, designers and communications specialists.

There has been a significant push in recent years to try and encourage and evolve the reading culture in Rwanda spearheaded by the National Library and taken up by an increasing number of community library projects.



Community libraries like Agati Library – a community library in Musanze founded to promote a reading culture amongst young people – also play a crucial role in promoting a reading culture for both children and parents. Similarly, the 'Pourquoi Pas' library was opened by a non- governmental organisation in the city of Muhanga to foster a reading culture amongst the francophone community of the area while also supporting researchers and academics.

New community libraries have also been established by USAID's Mureke Dusome activity. These libraries use space provided by the district and are each equipped with books, bookshelves, mats, chairs, a computer, and a printer. Volunteers have been identified to staff the library, organise community literacy activities and encourage children to read.

Case Study

Kigali Public Library

The Kigali Public Library (KPL) was established in 2012 by the Rotary Club of Kigali-Virunga and is presently supported by the Government of Rwanda.

The library offers access to various digital and physical literary resources and also organises events, programs, and workshops to promote literacy, creativity, and innovation.

In September of this year, KPL partnered with the British Council for the Rwanda launch of the British Council's Digital Library, which aims to provide education to everyone.

Challenges

The KPL was established with the aim of encouraging

a culture of reading in Rwanda. Despite its numerous achievements, this goal still remains a challenge today. Many people, especially educators and parents, continue to consider reading for pleasure or reading fiction to be less valuable than studying subjects like mathematics and science.

Goals and opportunities

The advancements in technology have opened up new opportunities for literature to reach wider audiences, whether through reading or audio and video content.

This has the potential to make reading a more prevalent, accepted, and respected aspect of Rwandan culture.

As with dance and music and theatre, poetry continues to play a vibrant and relevant role in Rwanda, both in traditional rites and ceremonies and in modern culture and creative expression.

The tradition of libyivugo and Ibisigo – poets reciting traditional 'amazina y'inka-cow poetry' at weddings is still strong and plays an important part in rural and urban Gusaba (traditional wedding) ceremonies today.

However, as with other traditional arts, young artists have embraced and reimagined this traditional art form, and poetry - in the form of spoken word and slam poetry - is alive as a popular art form today.

Contemporary poetry draws on the traditional rhythms and motifs of musanga poetry but relates it to contemporary themes and modern language and enhances it with music.

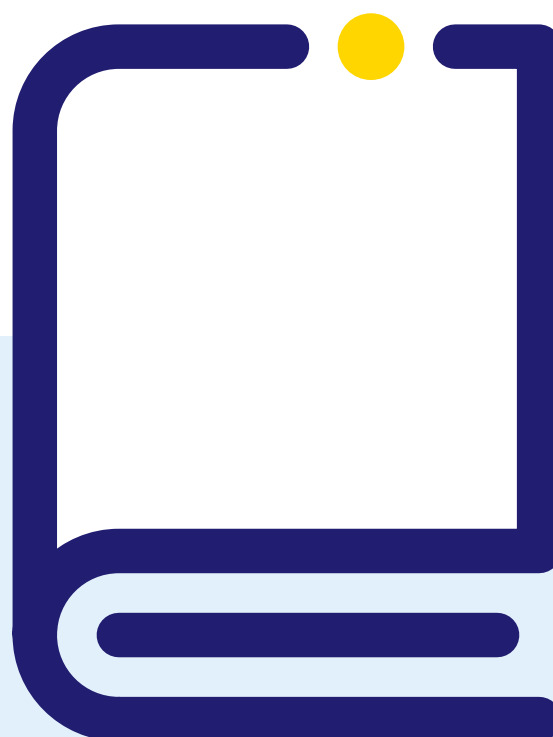
It is also performed by both men and women breaking the traditional norms of musanga poets being male.

One of the pioneers of this new wave of contemporary poetry is Diana Mpyisi who, since 2011, has been hosting monthly spoken word events in Kigali. Through this event, young poets such as Syvestre Nsengimana

and Rumaga developed their unique voices and built on and re-shaped this very traditional performing art. Today young poets such as Angel Mutoni have a strong presence on social media and are releasing albums and new events such as the one hosted by Rumaga are to be found across Kigali.

Influential creative and cultural actors

Organisation	Description
Spoken Word Rwanda	Monthly poetry night founded by Diana Mpyisi in 2011. It invites young poets to perform to a live audience as well as hosting festivals and content across digital platforms.
Bakame Publishing	Rwanda's first publishing house to produce children's and youth literature.
Agati Library	Agati Library is a community library in Musanze District co- founded in 2018 as a social purpose project to promote literature to young people in the area. by 6 young people who grew up together. Agati Library has 2000+ average monthly visits and acts as a library and community space for arts and creative events.
Kigali Public Library	Initiated by the Rotary Club of Kigali-Virunga and now funded by the Government of Rwanda, the Kigali Public library provides access to a range of digital and physical literature materials as well as hosting events, programs and workshops that foster literacy, creativity, and innovation.



Sector Mapping Detailed Findings

The following mapping has been conducted from analysis of both a telephone survey and in- depth qualitative case study interviews. Through a semi-structured telephone survey 140 people from across all five districts of Rwanda were invited to share information about their work, organization, and the challenges and opportunities they face in the sector.

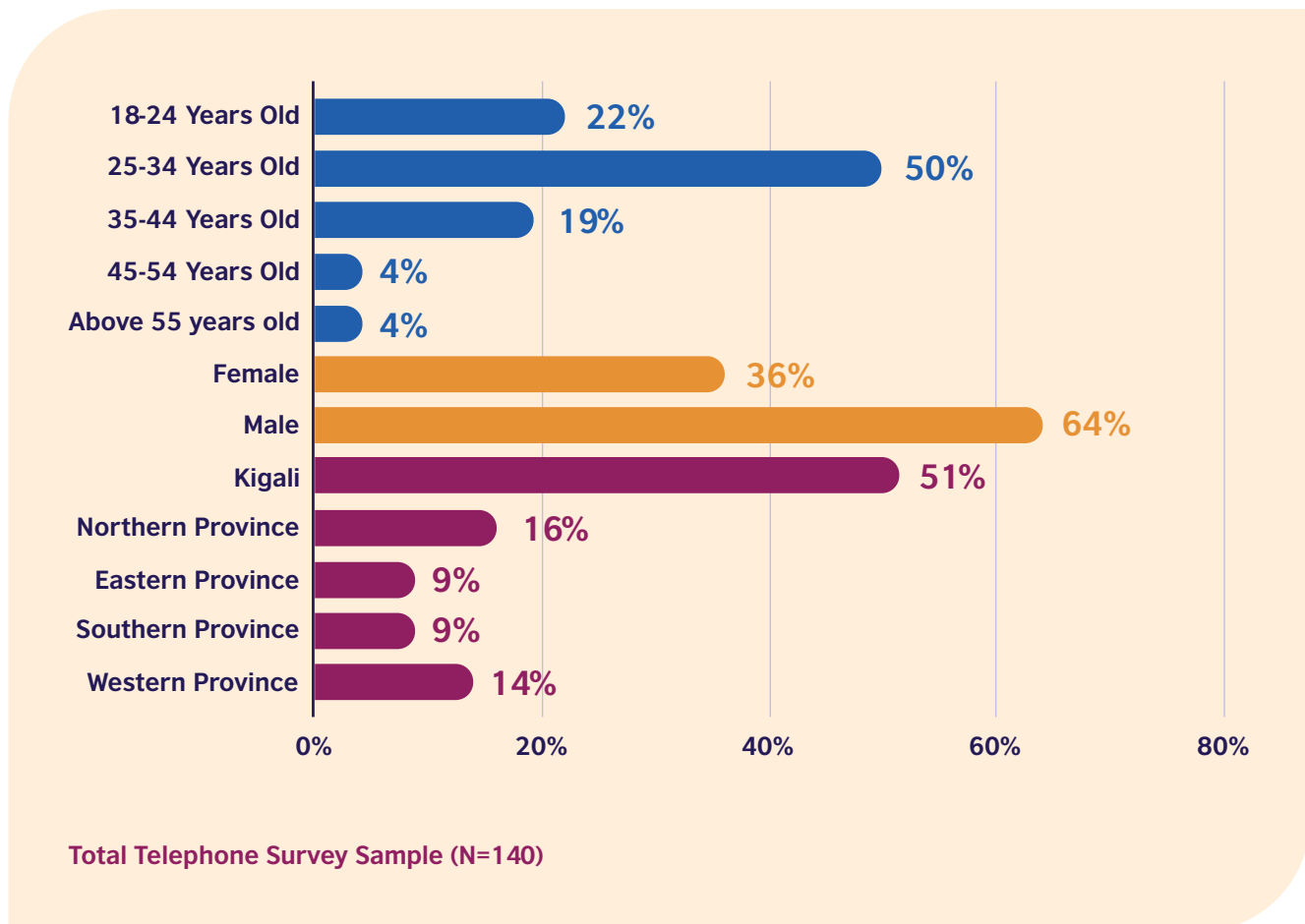
This broad mapping was then supplemented with 22 in-depth interviews with experts, leading artists, and sector advocates to help unpack and understand these issues in detail and provide recommendations as to how the British Council and its partners can provide support to the sector.

The following chapters seek to first describe the types and characteristics of sector operators, and then explore at a more holistic level, the trends, challenges, and opportunities the sector faces.

Key Demographics

Across the telephone survey 72% of the creative sector participants mapped fell under the British Council's definition of young people (those between 18 and 34 years of age). Over 90% of the sample were under 44 years old, two thirds identified as male, and over half were based in Kigali.

Table 1: Age, Gender, and Location



Whilst this mapping study is not a census, and should therefore not be considered representative, this description of a sector characterised by young urban practitioners does feel like an accurate reflection of the industry, and fits with similar descriptions from the experts we spoke to.

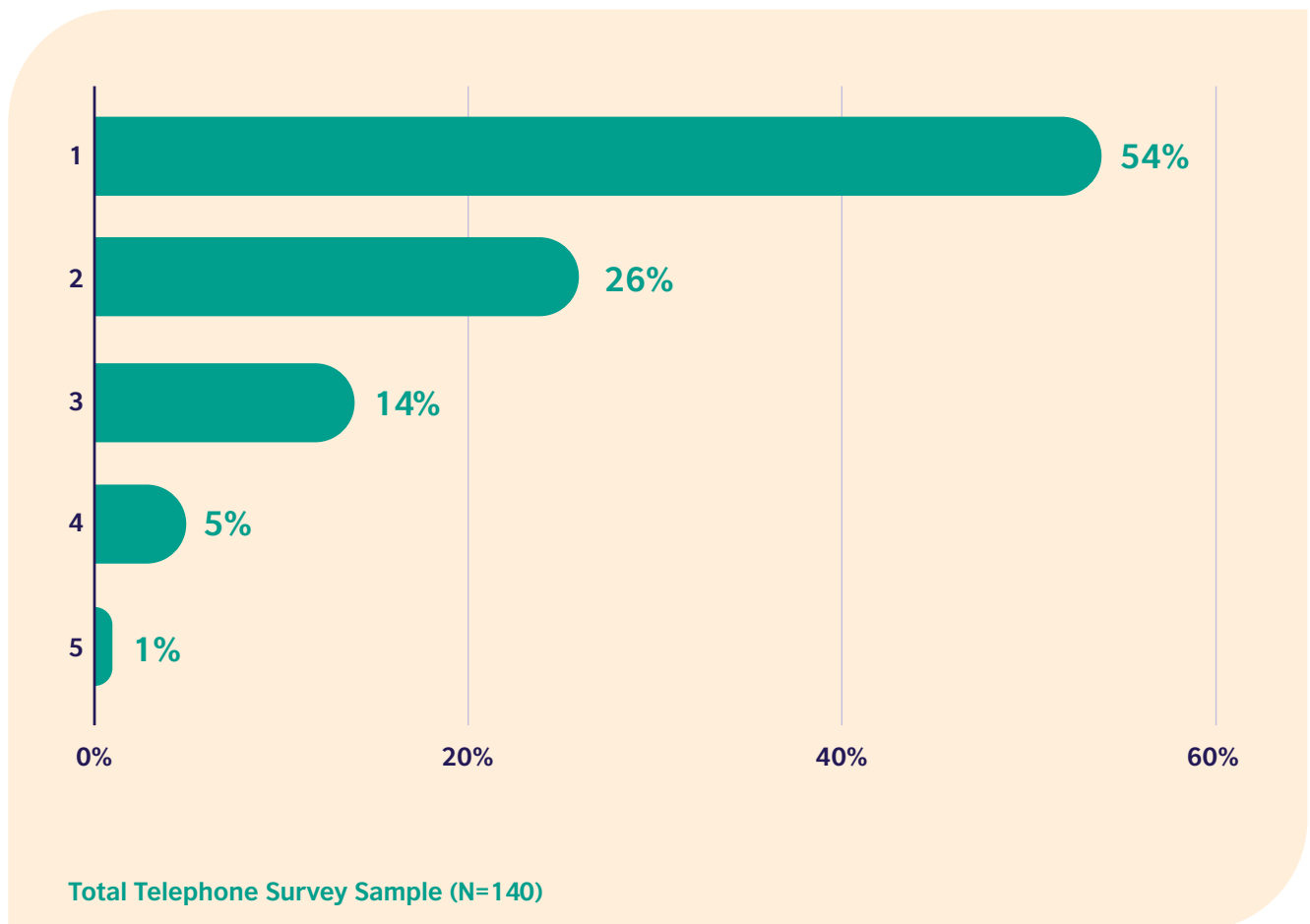
The over-representation of men vs. women across the sector generally also aligns with the experiences we have heard from industry experts, especially from those women who have made championing and advocating for better representation across the arts their life's work.

Creative Domains and Sub-sectors⁴

Overall, the survey found that almost half of all respondents (46%) described working across more than

one creative sub-sector, with two in ten (20%) working across three or more.

Table 2: Number of creative sub-sectors per participant



This speaks to the overlapping nature and cross pollination of the creative sector in Rwanda, where we see creatives acting in varied roles across the sector rather than specialising in one trade or creative discipline.

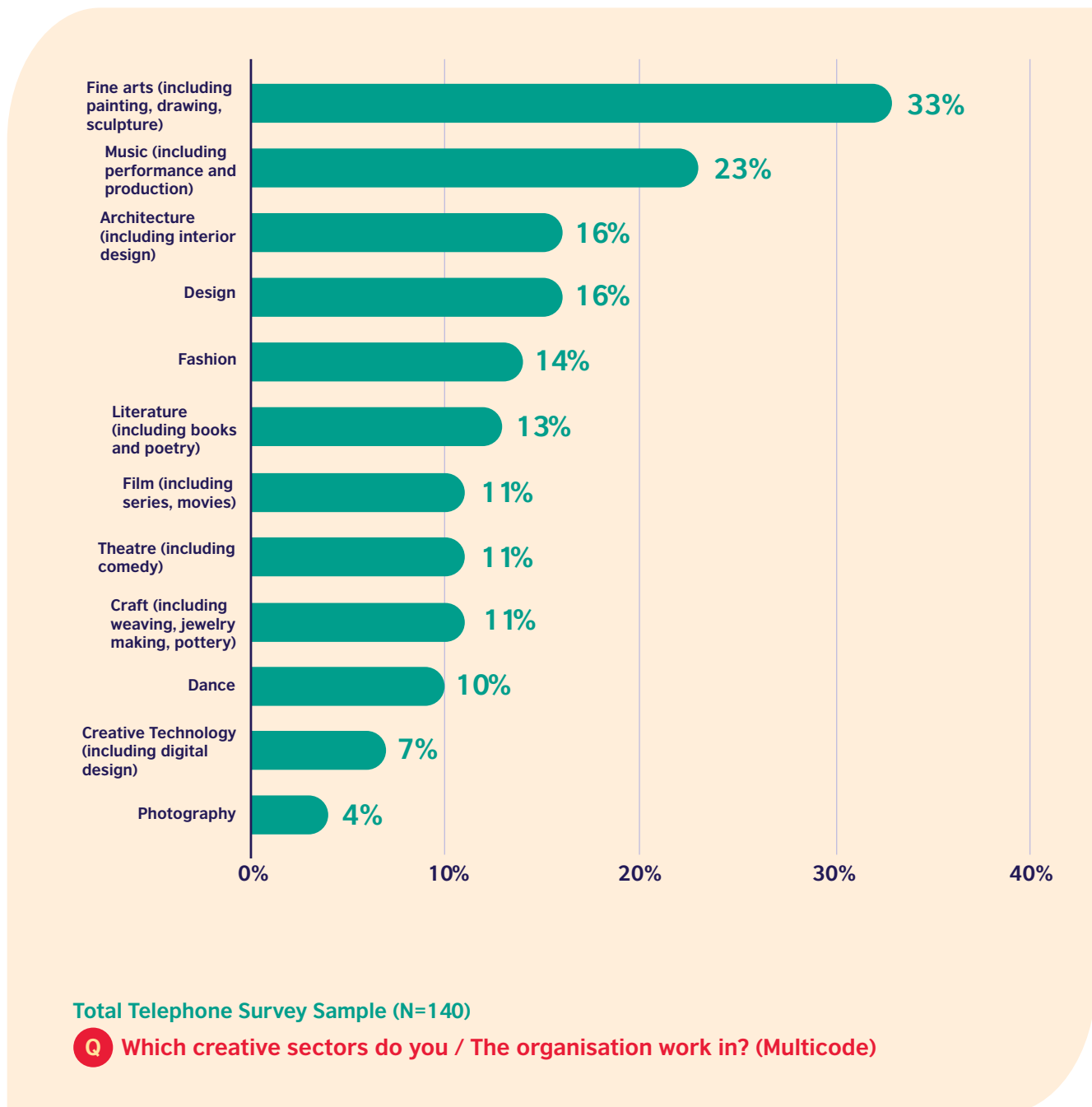
Whilst there was very little difference by location or gender, there was some disparity by age. From our sample, those at either end of the age spectrum (both the youngest and oldest) reported engaging in fewer types of creative activity. 65% of 25-18 years old and 67% of 55 year olds + stated they work in just one creative domain. This was compared to 48% for 44-35 year olds.

⁴ For full list and definition of sub-sectors see page 6 of this report.

The biggest areas of crossover were seen in areas with complementary skills such as visual arts (e.g., graphic and interior design, crafts, architecture, fine arts) and

also film and theatre. Music and fashion were more likely to be represented amongst those who describe working in a single sector only.

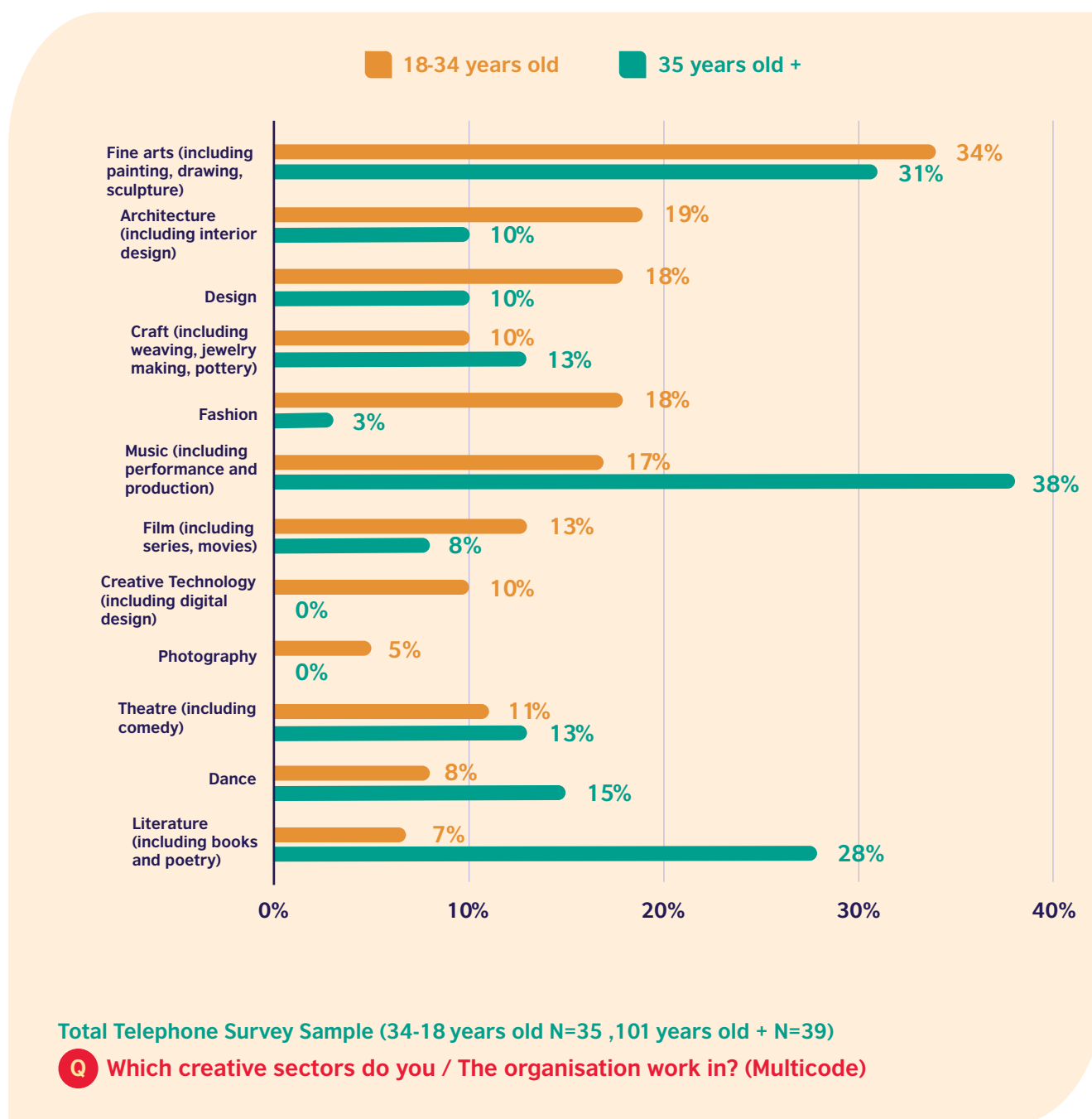
Table 3: Creative Sub-sectors



Whilst the survey strived for representation across all domains, the natural fall out across our sample skewed more towards some creative activities than others. One in three (33%) described themselves as fine

artists (this included any mention of painting, drawing, sculpture etc.). Music was then the second most common area (23%) followed by architecture and design (both 16%).

Table 4: Creative sub-category by age



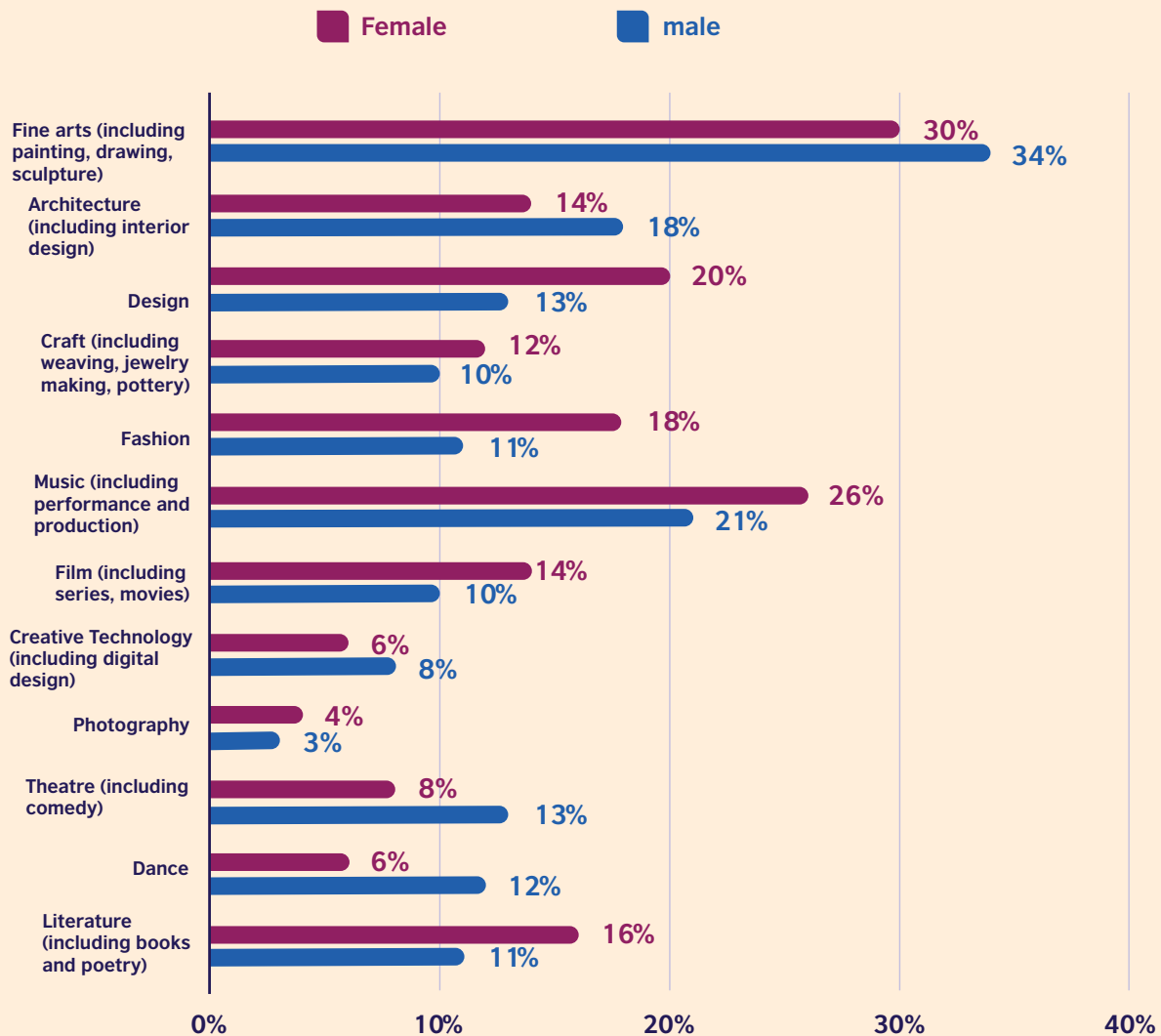
Overall, young people showed a varied interest across all domains and sub-categories.

As may be expected, across those mapped, younger participants (34-18 years old) were more likely to be engaged in areas which require more modern technology and equipment e.g., none of the over 35's were working in creative technology or photography. Younger people (34-18 years old) were also more likely

to be working in more 'modern' areas of the sector such as architecture (19%), design (18%) and fashion (18%).

Older participants (those over 35 years of age) showed a little less diffusion over the sector as a whole and were more likely to be working in music (almost 40% of over 35's described being musicians), literature (28%) or dance (15%).

Table 5: Creative sub-category by gender



Total Telephone Survey Sample (Female N=50, Male=90)

Q Which creative sectors do you / The organisation work in? (Multicode)

Across our sample there was less difference in the sub-categories of interest by gender than may have been expected, with men and women being represented across every area.

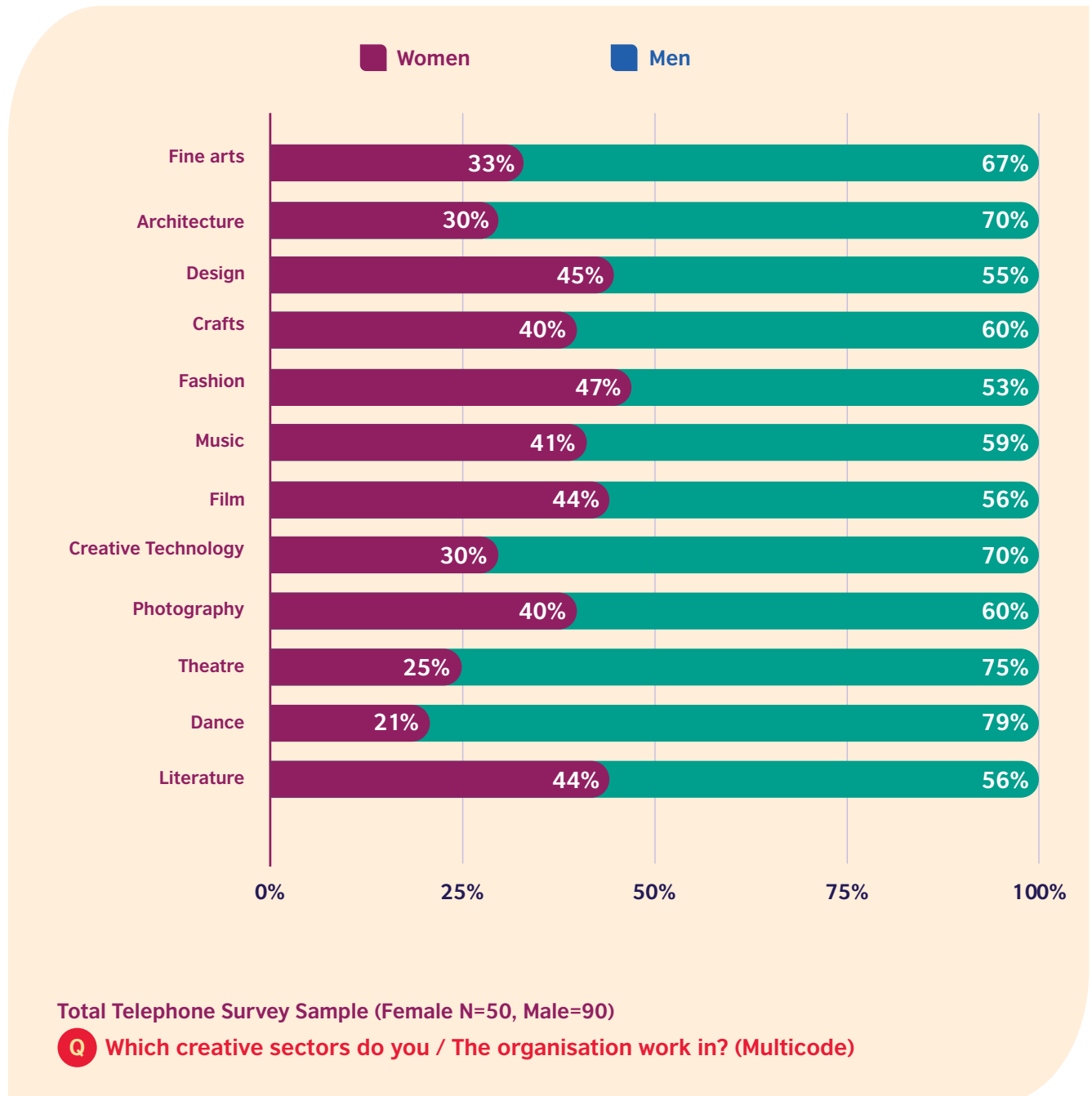
Overall, we see women being slightly more likely than men to be engaged in visual arts such as design (20% of women compared to 13% of men) and fashion (18% of women compared to 11% of men). Men were slightly more likely to be engaged in the performing arts such as theatre (13% of men compared to 8% of women) and dance (12% of men compared to 6% of women). It is important to remember however, that men outnumber women across the sector mapping by two

to one. So, whilst it is encouraging to see that women are finding a place across every area of the industry, in every area of the industry women are still the minority. As participants explained, the creative and cultural sector is still married with negative gender norms and stereotypes around women's capabilities and roles, making it more difficult for women to both access and succeed in the sector.

Added to this is the reputation many of the arts sectors have for being less reputable and suitable for young women, reducing the support and encouragement women entering the sector receive.

The sub-sectors that come closest to gender parity are fashion (women represent 47% of the sector), design (45%) and film and literature (both 44%)

Table 6: Creative sub-sectors share of gender



In terms of location, those based in Kigali were much more likely to be engaged in film (18% of those based in Kigali compared to 4% of those in other areas) or creative technology (11% compared to 3%) – a finding that feels intuitively correct given these sub-sectors’ high need for technology and infrastructure. Fine arts (46% of those outside of Kigali compared to

21% in Kigali) and crafts (13% compared to 8%) were more likely to be found outside of the capital.

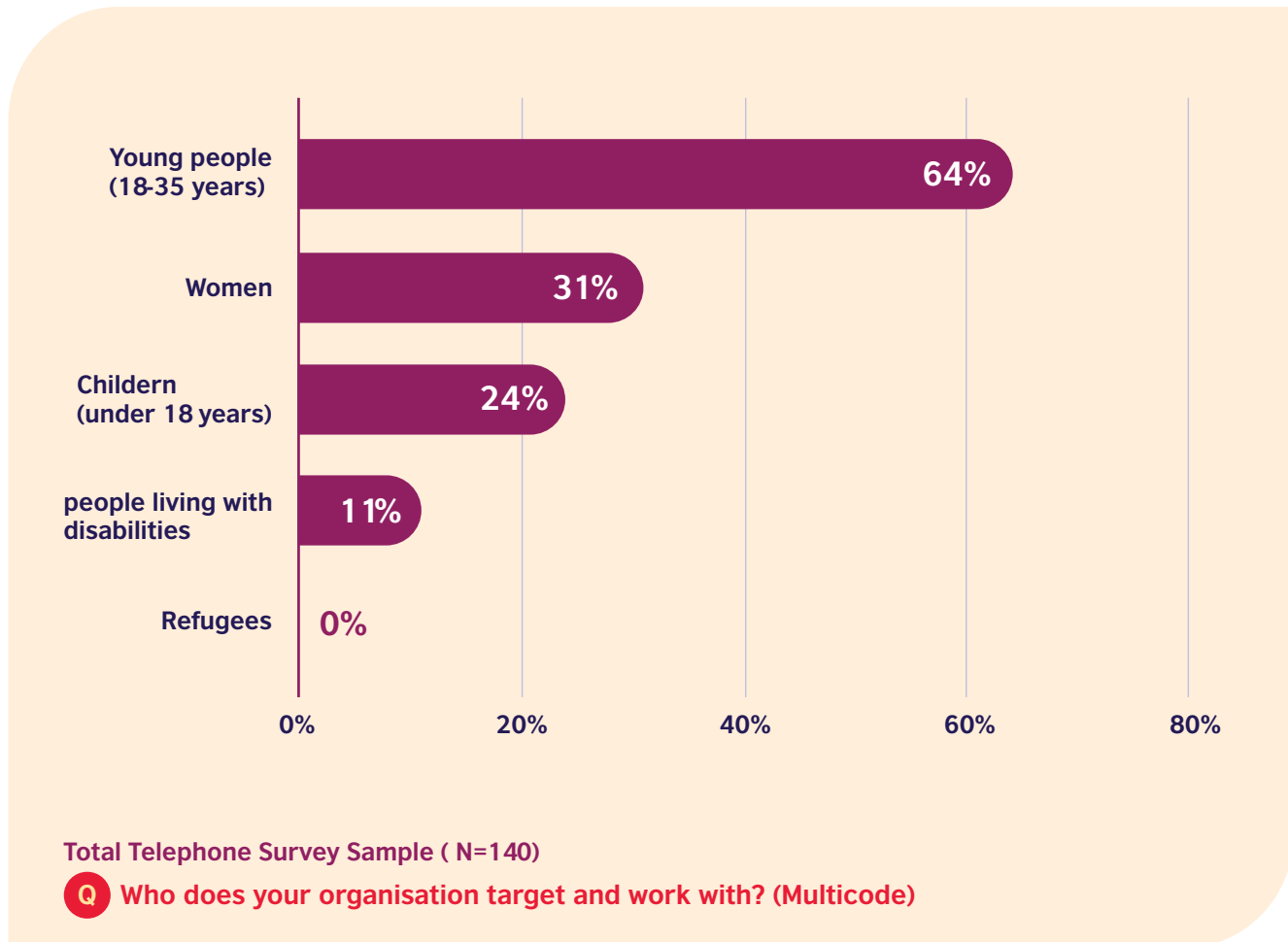
Again, this rings true to experience and seems to align with the close relationship crafts and arts have with the tourism sector in Rwanda.

Audiences and target groups

A key research question for the British Council is to understand areas for potential collaboration and involvement from minority, vulnerable or excluded

groups. As such, the mapping sought to identify the extent to which organisations work with and target key groups.

Table 7: Target groups and audiences



Unsurprisingly, given the demographics of the sector, (and of Rwanda more broadly) young people were a primary target for the majority of individuals and organisations (64%).

Women appear also to be a key audience with almost one in three (31%) organisations targeting women specifically, and one in four (24%) describing working with children. Only 10% however described targeting or working with those with disabilities and none in the sample described working with refugees. Indeed, across the entire study we found numerous mentions of projects focused on engaging with women however, only a handful of projects engaged directly with those

living with disabilities (see next chapter for notable examples) or more marginalised groups such as refugees or LGBTQ+ rights groups.

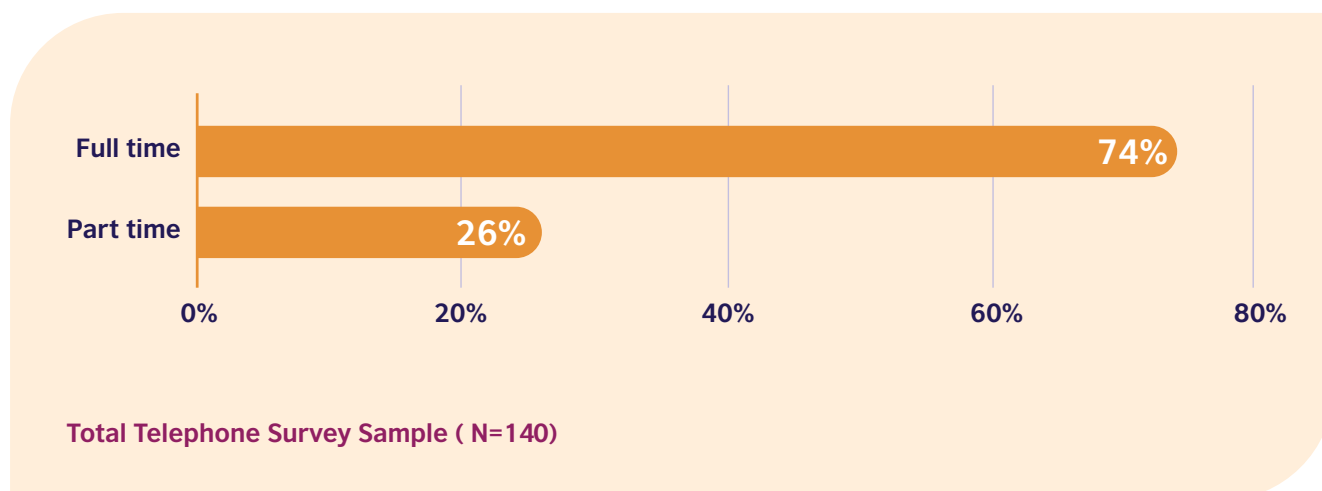
Whilst a deep dive into the issues surrounding disability exclusion would be a recommendation from this study to better understand this in more detail, some of the reasons for this mentioned by participants were a) the enduring stigma and marginalisation people living with disabilities in Rwanda continue to face and b) the additional costs (perceived and actual) of accommodating people with different needs in activities such as a performances and touring situations.

Organisational set up and structures

Of the 140 people who participated in the mapping, three quarters (74%) were working full time in the

cultural and creative industries.

Table 8: Full vs. Part-time employment



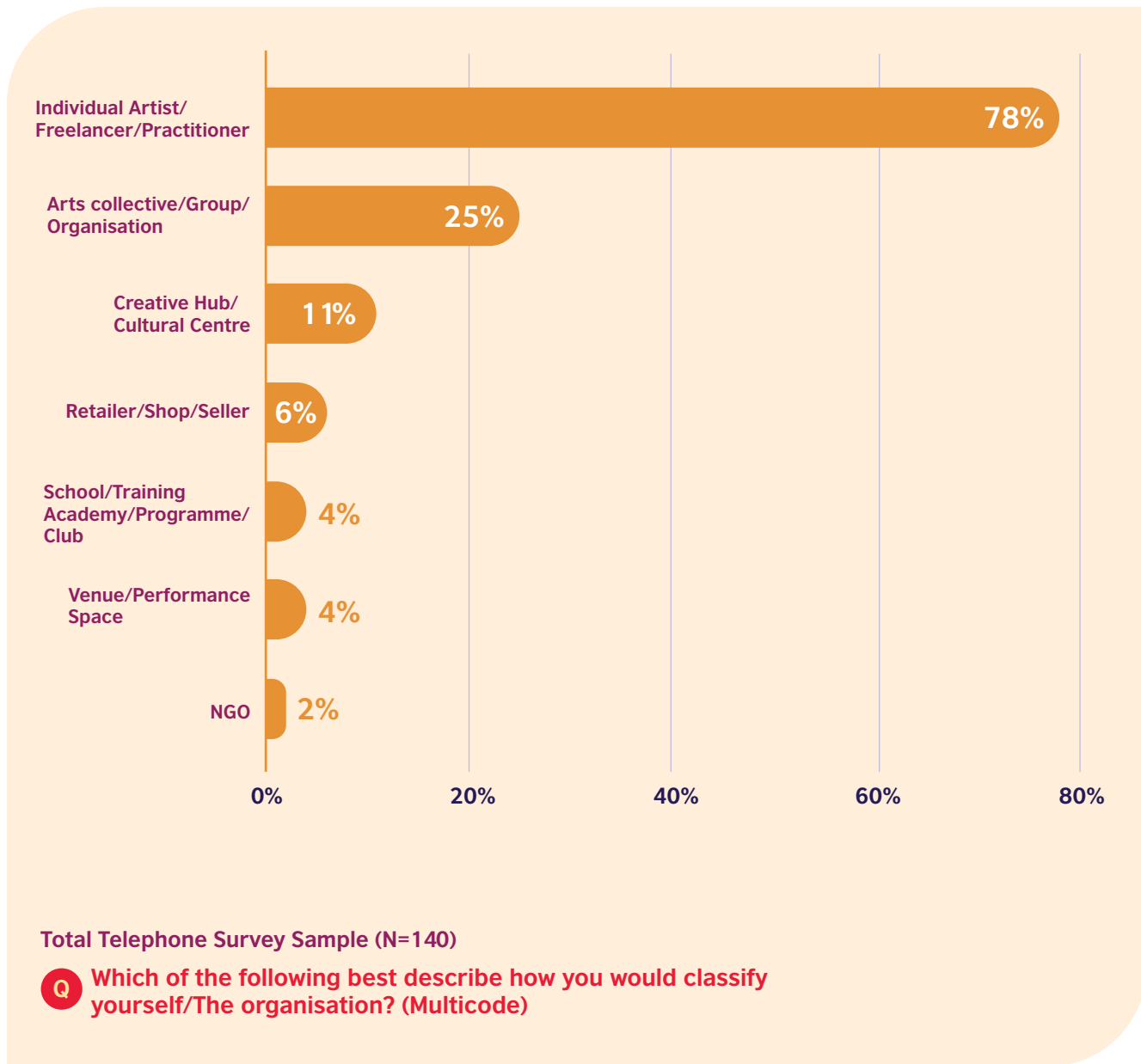
This survey did not explore the difference between full and part time work in detail, however it did surface some trends across the data.

Men were more likely to be in full time employment (79%) as compared to women (66%), a trend that feels aligned to what we would expect to see across many sectors as women are more likely to balance work with domestic duties and childcare.

Younger participants were also more likely to be in full time employment with 80% of 34-18 year olds reporting working full time in the sector compared to only 58% of those over 35 years old. This is perhaps a reflection on the types of employment younger people are gravitating towards with opportunities in sub-sectors such as design and creative technology being more likely to offer full time positions.



Table 9: Organisational structures and types

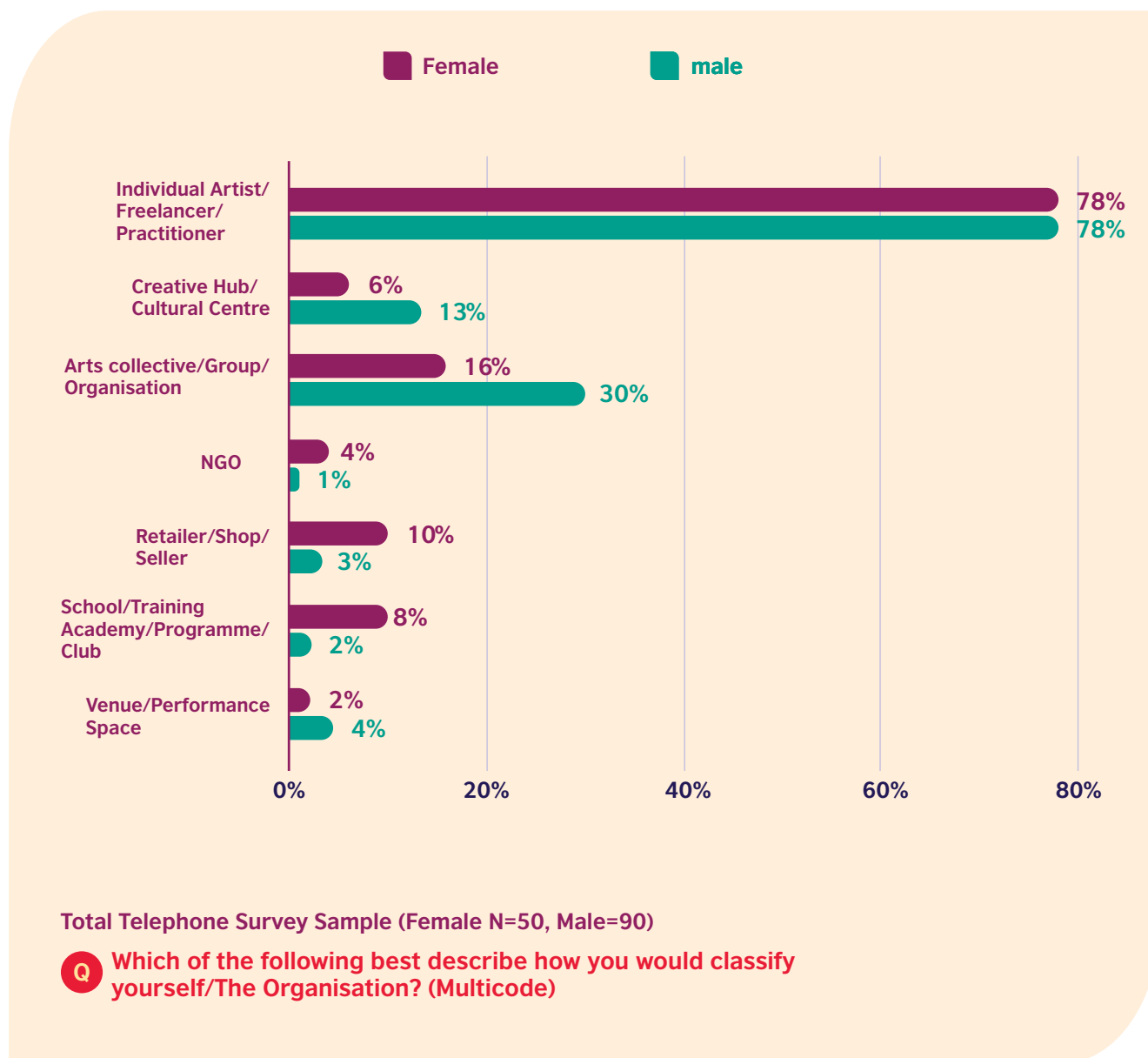


Across the mapping most participants we spoke to described themselves as individual artists, however we were able to include representation across a range of organisational structures.

It is interesting to note that one in four participants (26%) described themselves / their organisation in more than one way. Most common was for participants to describe themselves as both an individual artist and belonging to an arts collective, although others described themselves as shops, training facilities and individual artists.



Table 10: Organisational structures and types by gender



Whilst men and women are equally likely to describe themselves as individual artists, men were more likely to describe being involved in collective endeavours such as being part of an arts collective (30% of men compared to 16% of women) or as a cultural hub (13% of men compared to 6% of women). Women on the other hand were more likely to describe themselves as a retailer (10% of women compared to 3% of men).

As discussed in the previous chapter, collectives are seen as important in the creative and cultural sector in Rwanda as a mechanism for both collaboration, learning, visibility, and resource pooling. Artists often work together on projects or come together to access

opportunities that, by themselves, they would not have the skills or resources to access.

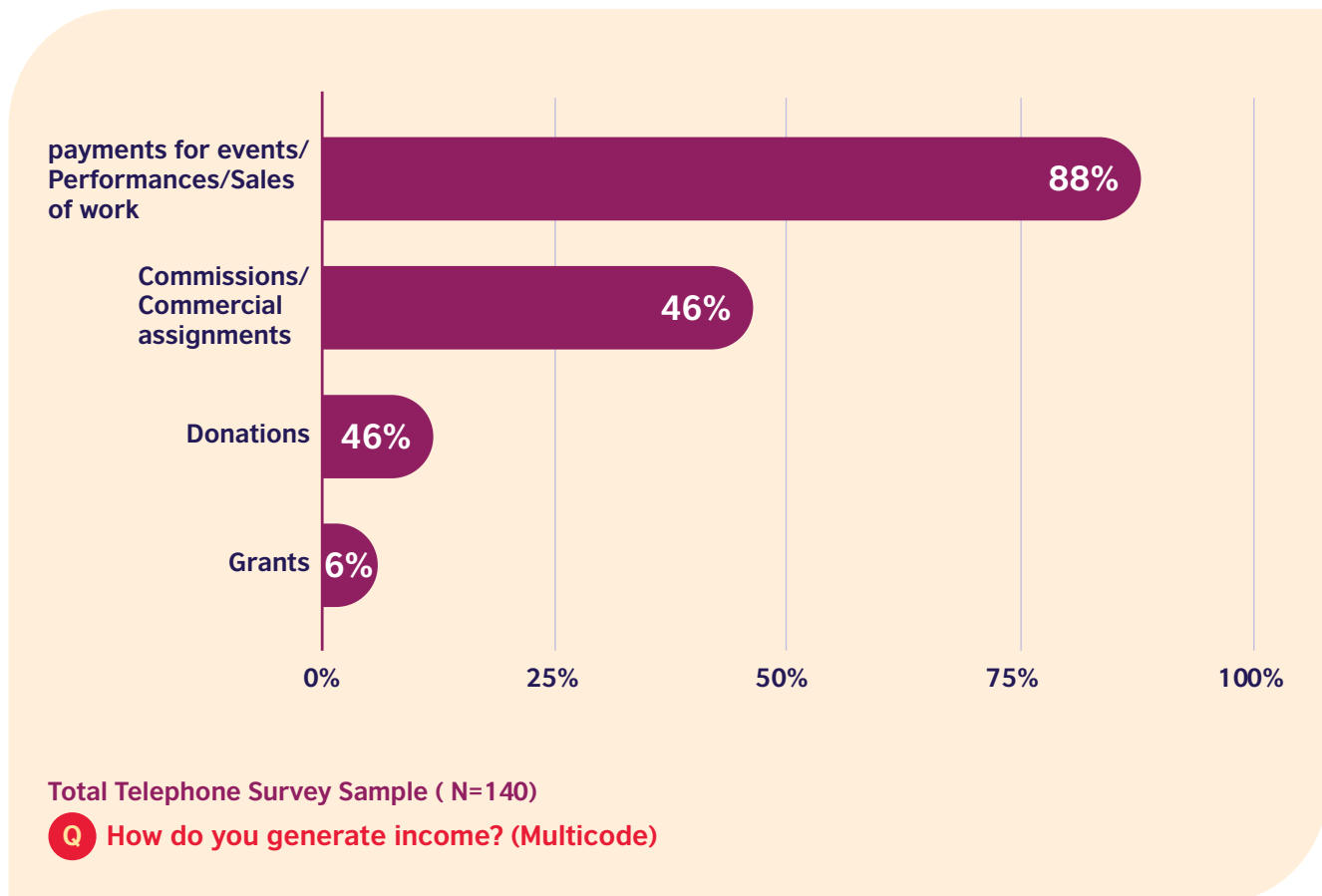
The idea of men having a higher propensity to be in collective groups was a theme discussed at length by some of the female artists consulted as part of the expert interviews. They described how women are often 'left out' of opportunities for exposure or market access as they are not as visible or integrated into the 'scene' as their male colleagues. Indeed, many female advocates in the creative space have poured significant effort into setting up women's collectives for this very reason.

Income-generation, financing and funding

Of the 140 people who participated in the mapping, over half (52%) described receiving funding from multiple sources. Of those sources, the majority described receiving commercial funding such as public

sales / events (86%) and commissions (46%). Only nine (6%) of the survey participants described receiving funding from grants. Of these, all but one was also raising money through sales or commission.

Table 11: Sources of income generation, financing and funding



This reliance (or lack thereof) on grants paints a very different picture from the experiences of those interviewed as part of the expert roundtable and in-depth interviews who tended to be the more prominent or successful voices in the arts sector. Amongst this group, funding from grants (primarily from the international donor sector) was a main source of income, especially for those who were providing training or education or those who were taking exhibitions or shows to tour regionally or globally. This idea that donor funding is only accessed by a small minority of the creative sector was a topic that was discussed at length during the in-depth interviews and round table. On the whole donor / grant funding – whilst valuable – is seen as complicated to both access and manage making it inaccessible for the vast majority of creatives in Rwanda.

There is a sense that the donor landscape is complicated and creatives struggle to understand where funding opportunities may come from and how to find those that are available. This is both in terms of knowing where (and when) to look (e.g., we heard

multiple examples of ‘missed

opportunities’ because calls for proposals were only found online after the closing date) and also understanding what the priorities and focus areas of development organisations are.

There is a widely held view that applying for grants is also difficult and requires skills and resources many creatives don’t feel they have e.g., the ability to write compelling proposals, an understanding of contracting, procurement processes or data protection policies. Managing grants was also felt to be difficult and again require skills sets outside areas many creatives feel comfortable e.g., financial and impact reporting.

These issues compound and result in a situation where funding tends to go to a small number of creatives or organisations who a) have the skills and networks to be able to seek out and apply for funding and b) experience of applying for and managing funds.

Table 12: Reliance on funding sources

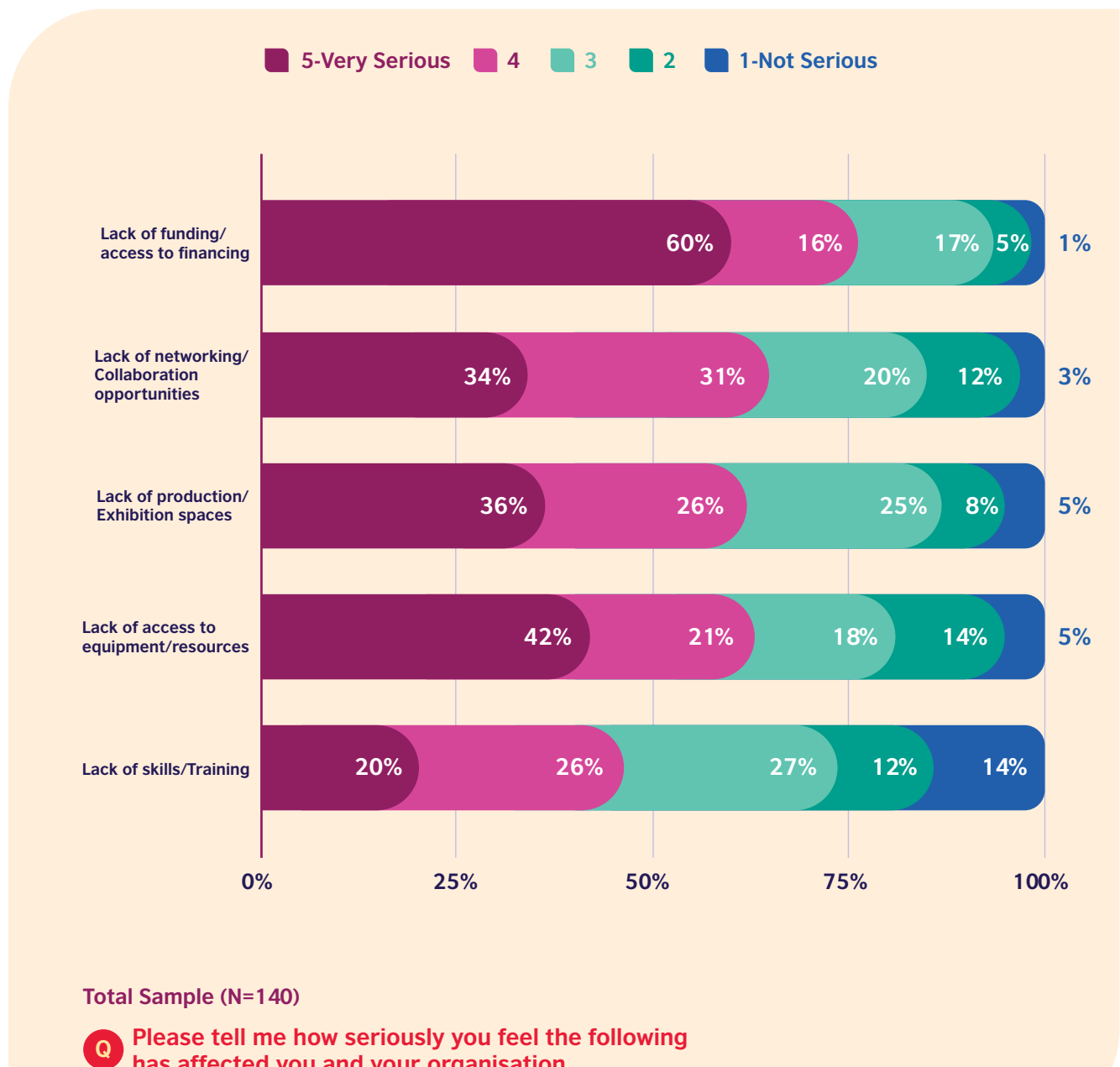
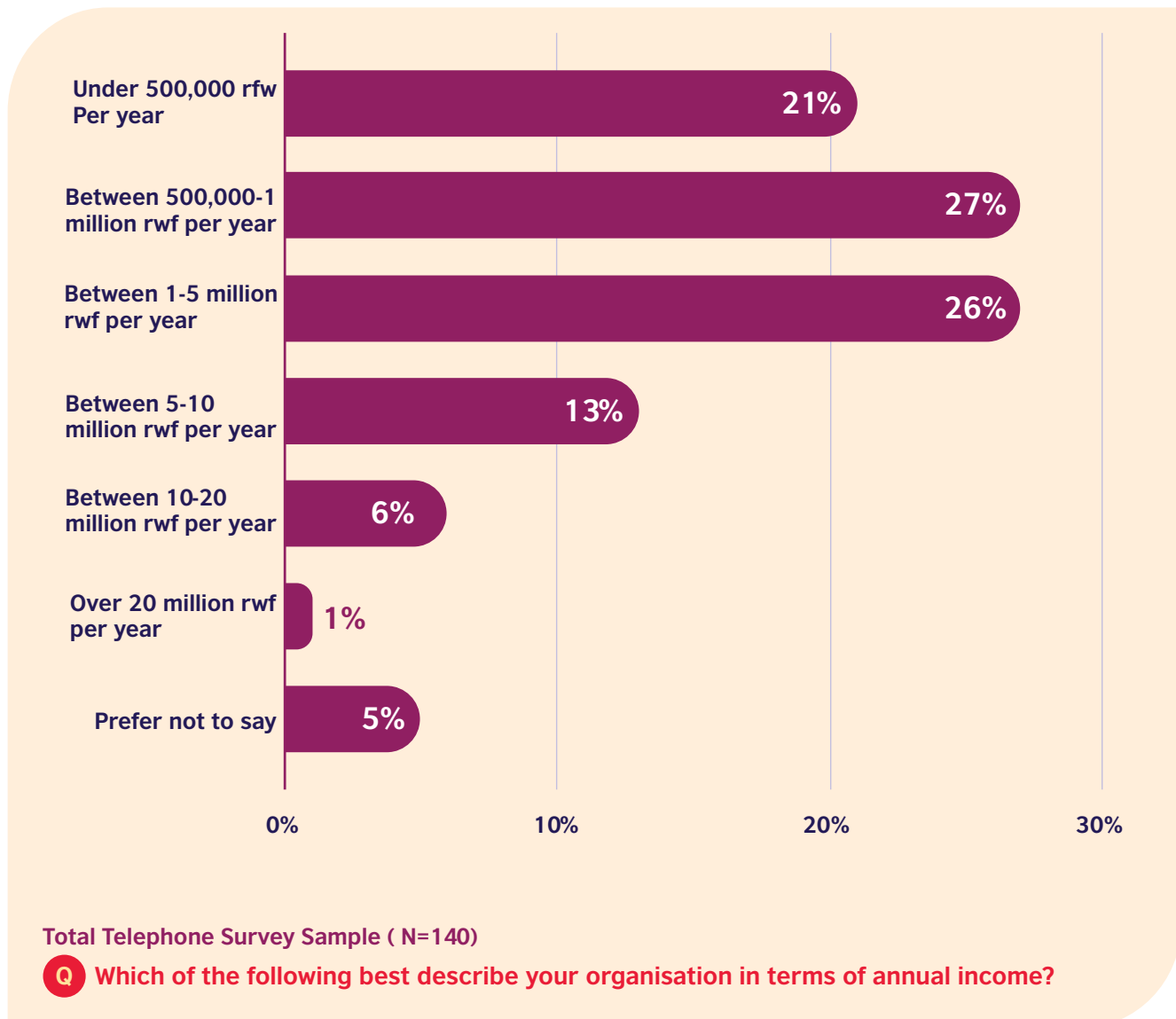


Table 12 shows the level of reliance individuals and organisation have on the types of funding they receive. Whilst we must be cautious of the small sample sizes here; we can see that overall respondents reported being more reliant on commercial sources of income than grants and donations.

This finding does seem to chime with the challenges we heard from in-depth interview respondents about the

difficulties with the inconsistency and ad hoc nature of grant funding generally. Even the most established artists and institutions struggle with sustainability when relying on grants and bemoan their often ‘restricted’ or ‘ringfenced’ nature which makes them difficult to rely on long term or to grow or business plan against. To bridge their gaps between funding, successful artists and organisations balance multiple income streams – albeit precariously.

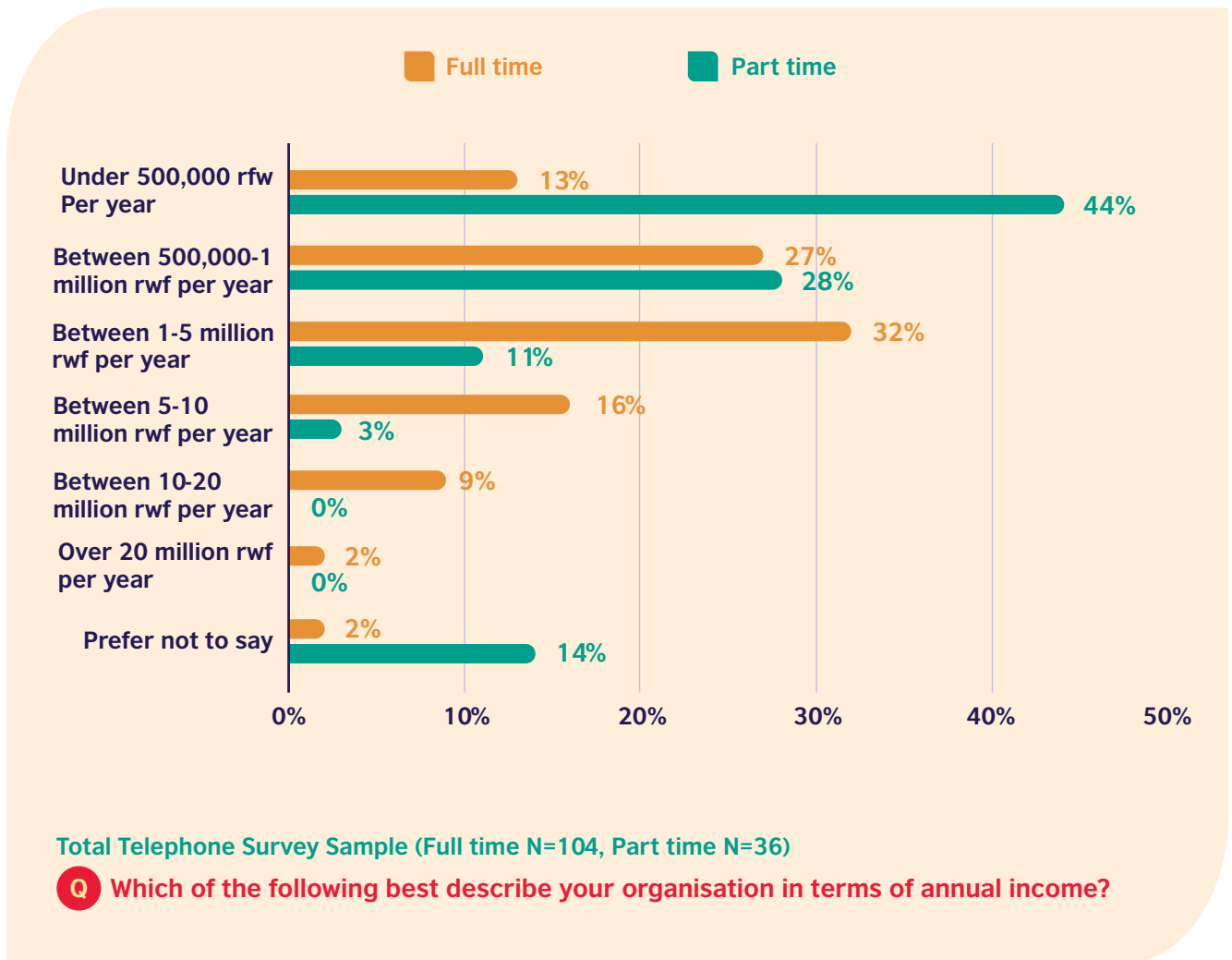
Table 13: Annual Income



All participants across the mapping survey were asked to estimate their annual income as a way for us to gauge the size and scale of the organisations. As table 13 shows, whilst the annual income of organisations and individuals in the creative and cultural sector varies dramatically, the vast majority of people index towards the lower end of the income spectrum.

Even when we control for those working part time and only consider those stating they worked full time in the creative industries, 40% state their annual income as under 1 million RWF per year. By way of comparison the salary of new graduate teachers in Rwanda is approximately 2.9 million RWF per year (source: MIFOTRA).

Table 14: Annual income by employment type



As table 15 describes, women are still reporting earning less on average than men. Almost twice as many women report earning under 500,000 RWF per year from their work in the creative

sector (30% of women compared to 16% of men). And, of the 11 participants included in the survey earning over 10 million RWF per year, only one is female.

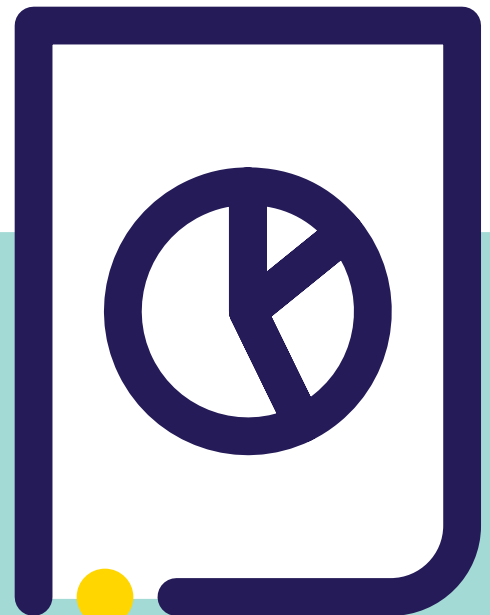


Table 15: Annual income by gender

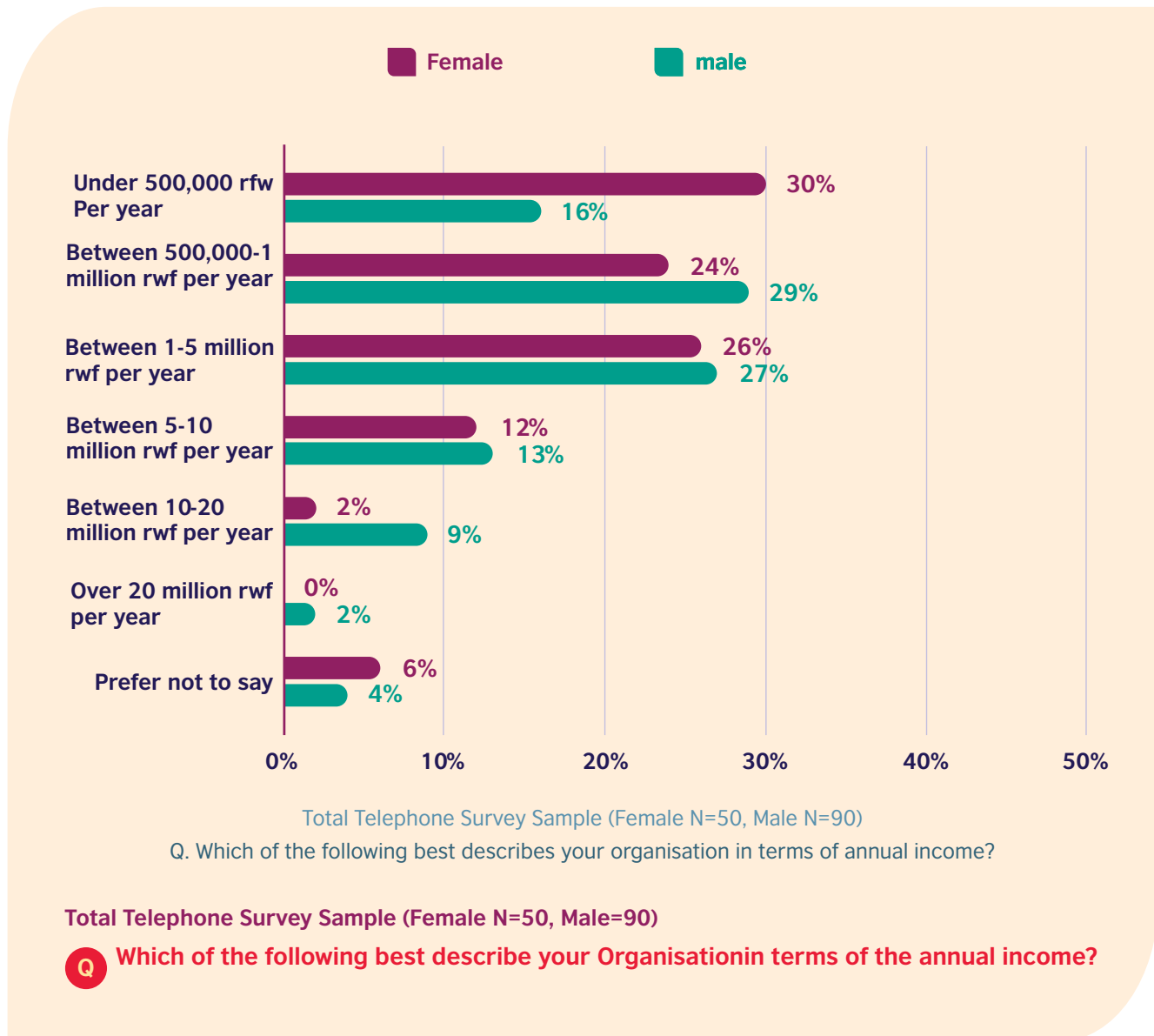
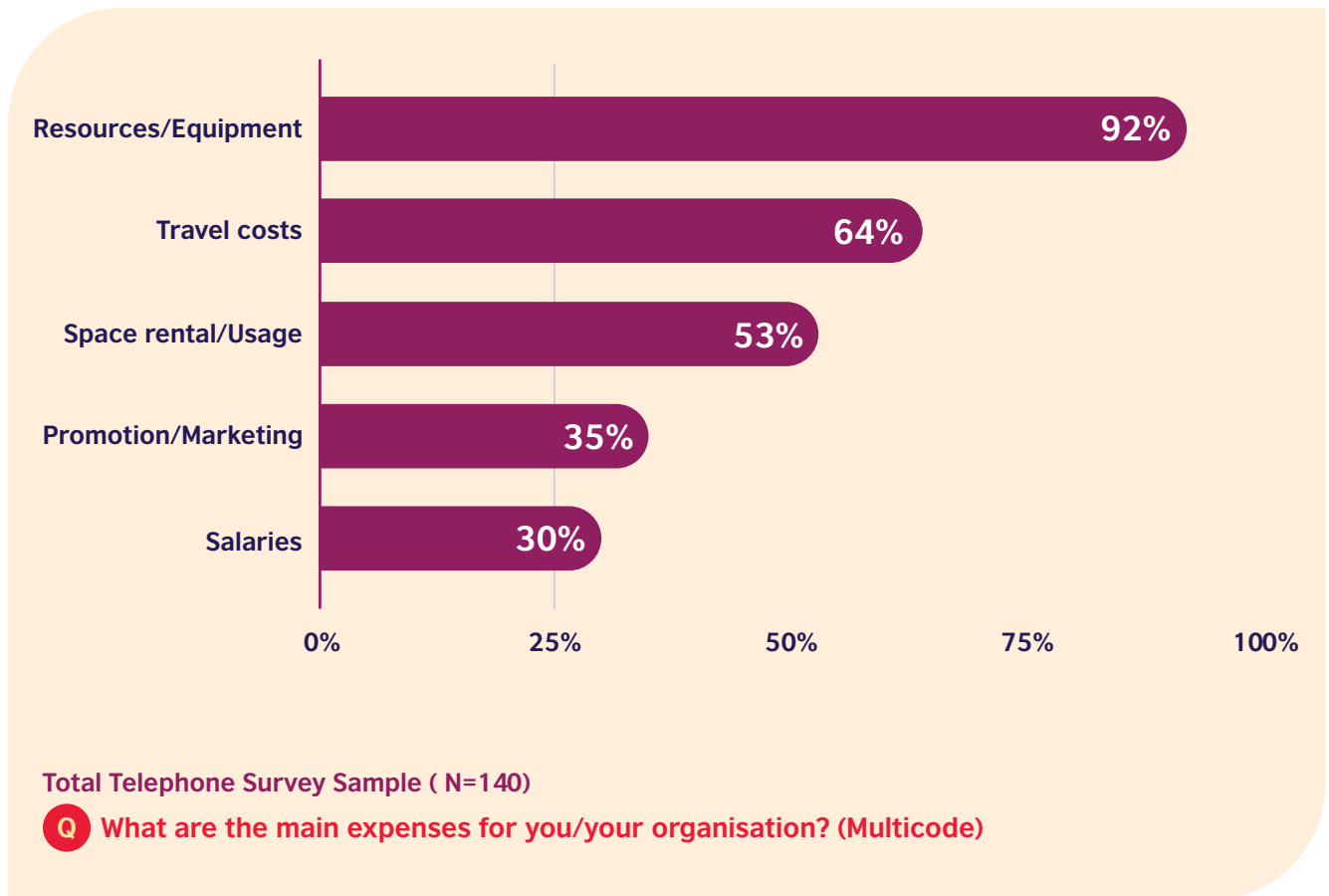


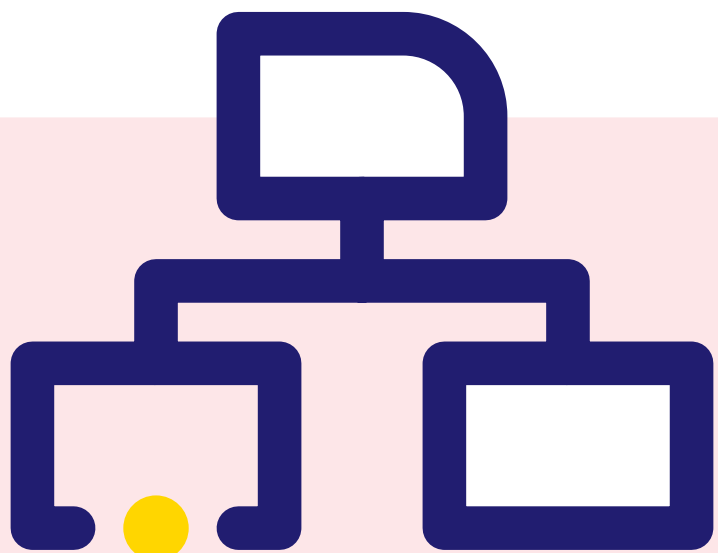
Table 16: Main Expenses



Across all domains resources and equipment were cited as one of the main expenses for practitioners across the creative sector (92% stated resources and equipment as a main expense). Travel costs were the second most stated expense (64%) closely followed by space (53%). When analysed by sub-sector we can see some variation in line with the practicalities of the creative process but, across the board these remained the predominant expense areas.

As explained by in-depth interview respondents, the

cost of even basic equipment in Rwanda - such as paints and simple materials - is high, due in part to Rwanda's small size and the difficulty of importing and accessing materials. For more expensive and specialist materials - such as film cameras or audio equipment - accessing these in the country is almost impossible. Here equipment needs to be especially imported which, due to high import taxes and few exemptions or breaks for those in the creative sector, makes them prohibitively expensive for even the most ambitious projects.

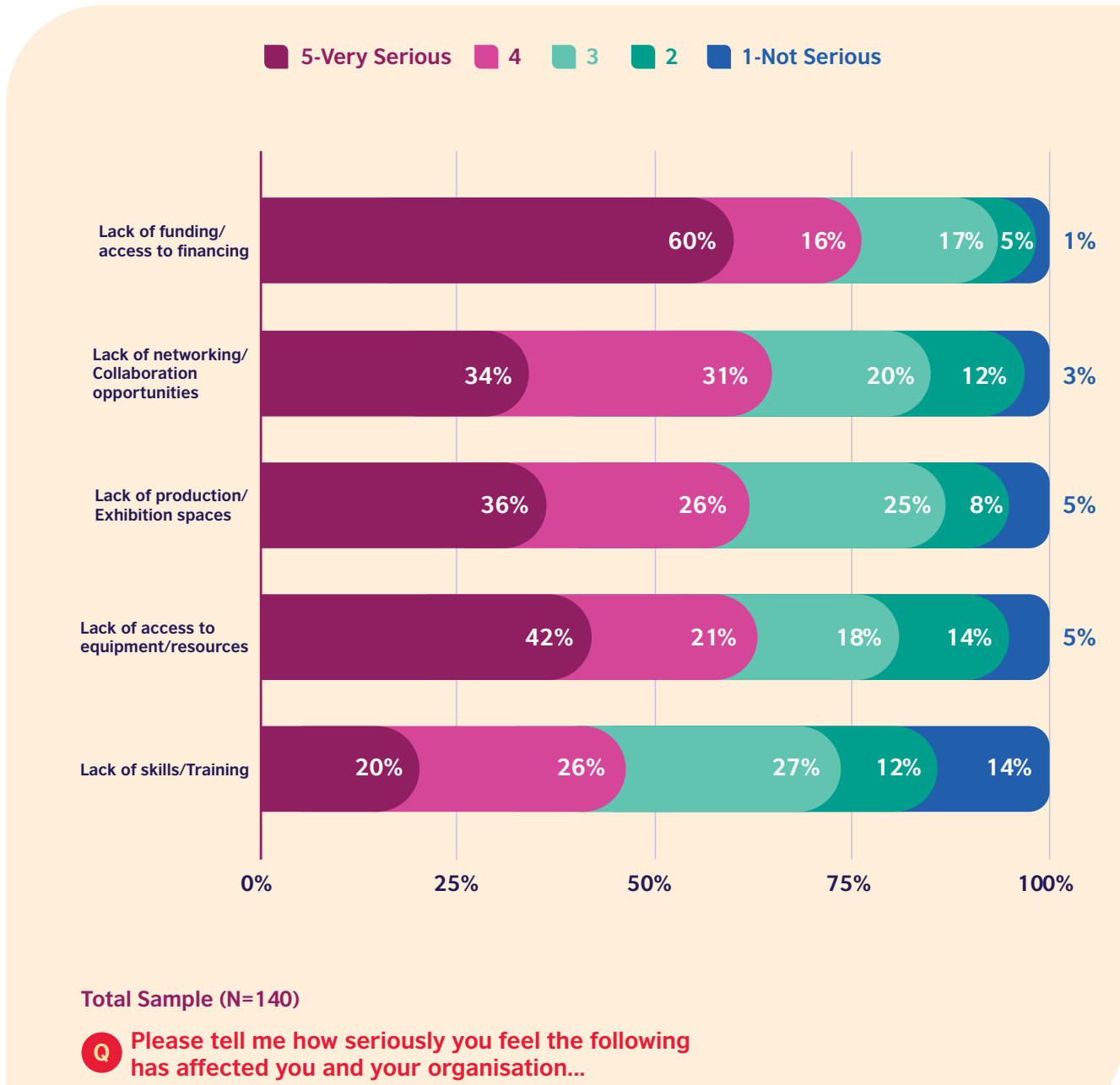


Sector challenges and opportunities

Through the desk review of previous studies into the Rwanda and regional creative sector, a preliminary list of five key challenges was developed to form the basis of the survey questions around challenges facing both individuals, organisations, sub-sectors and the

sector as a whole. These initial buckets were then built upon through more detailed exploration and examples through the case study and stakeholder interviews - but still serve to provide a useful organising framework.

Table 17: Issues facing organisations and the sector



As table 17 shows, members of the creative and cultural sector face multiple, serious challenges to the growth

of their individual success and that of the sector as a whole.

Lack of funding, finance, and income generation

Amongst those surveyed, a lack of secure income generation, funding or finance was ranked as the single greatest challenge to their organisation and the sector as a whole, with 76% of respondents stating that this was a somewhat or very serious issue for them. Artists and creatives at all levels discussed the challenges of trying to earn a secure living in the creative sector and, despite notable runaway success stories, the majority of those who do make a living in the arts do not command high salaries or status. Even for those most successful in the sector, access to consistent funding or remuneration for their work is one of the most significant challenges and they continually come up against the prevailing belief that creativity is a 'passion not a profession'

The small domestic market size, alongside the high costs of equipment, venues and spaces, makes earning a profit from creative activities very challenging. None of the creatives we spoke to were aware of any incentives, tax breaks, or stimulus support available to those in the creative sector. Sensitising creatives to any such incentives – should they exist – was considered by some participants to fall under the remit of the RAC as the 'port parole' of the arts community.

Whilst only 6% of those surveyed in this study described receiving funding for their work – the role of donor funding continues to play an outsized role in the contemporary arts. Institutional donors – Institut Française, the Deutsche Gesellschaft für Internationale

Zusammenarbeit (GIZ), Goethe-Institute, Swiss Development Corporation and the British Council and others – continue to support the arts in Rwanda and are highly influential in providing opportunities for regional and international collaboration and supporting innovation and pioneering work. However, as creatives from across the spectrum of visual and performing arts discussed, this support can be very difficult to access and manage.

The Inconsistent nature of funding alongside conditions such as match funding or ring-fenced funding requirements, systems and procurement compliance mean that only a very few individuals/organisations are set up to apply for and receive funding. Additionally, once received it is recognised that this can only be relied on for a specific length of time. Individuals reported that they had even turned down funding due to the complexity of 'strings' attached to its implementation.

Even the most successful projects and artists struggle to manage funding when it is awarded. Funders often favour covering direct costs of performances or touring but are unwilling (or projects don't account for) the ongoing running costs such as permanent project management staff, space for development or production and overheads. This limits projects' ability to become sustainable and to grow, making it difficult to attract and recruit talent.

Sustainable networking, collaboration and exchange

Developing established, quality networks and collaboration opportunities is essential to the life- blood of the creative sector. In order to build audiences and markets there is a need for a consistent flow of creative products, productions and outputs to provide a regular and credible offer. Collaborations and networks also help to keep costs down and provide opportunities for touring and showcasing – essential in ensuring that productions and exhibitions earn their value. Without this it is very difficult to build audiences, generate profits and grow the sector as a whole.

Whilst it is clear from the mapping that creatives across the sector recognise and value the role of connection and exchange, with 65% rating it as a serious challenge, what we heard from the more established and senior members of the sector (those who currently hold a lot of the networks and drive the collaboration) was that there is not only a need for it, but a growing need for this to be built into institutions rather than individuals. Whilst personal networking – although enjoyed and welcomed – was viewed as 'hit and miss'

and difficult to act upon unless there is a live / current project opportunity, a stronger model

proposed by many was a focus on institutional networking, collaborations and partnerships between collectives and venues in order to provide not only more security and longevity between these connections, but more opportunities for these connections to convert into live projects and opportunities. These networks would then feed more consistent creative output into a central hub around which audiences and markets could be grown. Across both the mapping and the survey, we heard that this lack of networking and collaboration was not only internationally or regionally, but within Rwanda itself. Despite being a small sector, it is not always open and as inclusive as it could be due to the often competitive nature of opportunities and funding. Whilst there are clearly those who are very connected across creative areas, for others breaking into 'the scene' and making local connections across disciplines is more difficult.

Lack of spaces and infrastructure

Over one third of survey respondents ranked a lack of space and resource as a serious challenge for individuals in the creative sector.

Whilst Rwanda has a range of entertainment venues which from occasionally host creative events – bars, hotels, restaurants, cafes, co-working spaces, arenas – there remains a lack of dedicated and purpose-built infrastructure for the arts that are not only suitable as performance space, but equipped to deliver curated content.

Having appropriate and dedicated ‘creative spaces’ is not only important for showcasing arts, but also for creating and refining productions. Dedicated spaces act as a connection point for artists, allowing them

to connect and share ideas as well as the time and space to refine their own. These dedicated spaces for performance and exhibition also help audiences to access (and importantly regularly access) the arts. Audiences build relationships with spaces and establishments that lend their credibility to artists, helping audiences to explore new arts and artistic ventures safely and confidently.

The reliance in Rwanda on entertainment venues, or venues without the correct infrastructure and teams to properly and professionally host performances and events, is not only impacting on the quality of productions but, as we have seen, the ability of Rwandan creatives, productions and events to even be performed.

Lack of access to equipment and resources

63% of survey respondents ranked a lack of equipment and resources as serious challenges facing their organisations.

This access is firstly about costs, but also about availability. When asked what the main expenses were for individuals / arts organisations, 92% of those surveys state resources and equipment. The availability and costs of even basic supplies and equipment such as paints are not easy to come by in Rwanda and even the more successful artists talk about relying on a loose network of colleagues and friends to bring in supplies from abroad.

Those who work in sectors which require more technical equipment such as film and music simply cannot access international-standard equipment in Rwanda and often are forced to either hire-in equipment from the region (e.g., film cameras from Nairobi, event production from South Africa) or outsource production and postproduction to Europe or the US.

This lack of equipment (and proficient technicians to operate it) results in production values that are not competitive on an international stage and is particularly restrictive in film, music and live events.

However, one word of caution was heard from experienced creatives around the risk of providing resources and equipment without the technical skills and knowledge required to correctly use them. Whilst the idea of providing high-end equipment / funding for equipment can seem appealing, many of those we spoke to had ‘horror stories’ of mismanagement and poor execution because, alongside the equipment the skilled technicians to use and operate the equipment also need to be in place.



Lack of training

Whilst lack of training was the lowest ranked theme in the survey, around half (46%) still ranked skills and training as one of the biggest challenges. Interestingly, those consulted as part of the expert interviews and case studies ranked skills and training much higher, stating it was one of the most significant issues they

faced. Whilst in many sectors (music, film, fine arts) the level of education and training is strong and improving, there are still gaps and specific needs, especially in the areas of technical training and creative industries management.

Specific creative industries training needs mentioned.

Technical Skills

- Postproduction in film and music.
- Lighting, sound and stage technicians in the performing arts.
- Graphic and digital design.
- Curation skills

Management Skills

- Project management
- Grant application
- Grant Management
- Reporting
- Finance management
- Tax
- Importing and exporting
- Pitching
- Contract law
- Client management
- Portfolio creation
- How to monetize your work
- How to search for opportunities

As described above, the need for specific and industry-standard professional training in technical areas of the sector such as sound engineering, set design and filming is very acute and acts as a barrier for industry growth and competition. Currently there is only a very small group of technicians working in Rwanda who can deliver against these needs (to international standards) and in some cases, particularly audio-visual post production, there is no capacity at all.

Alongside technical training there is a growing awareness, particularly from those more experienced

creatives who are now transitioning into roles beyond being individual artists such as curation roles, venue management, production house management etc., that they need to be better skilled and equipped in the business management of the creative sector. Specific areas where creative management skills and capacity building were felt to be lacking included project management, applying for grants / grant management / reporting, curation, finance management, pitching, contract law and how-to cost and value work.

Policy, laws, and artists rights protection

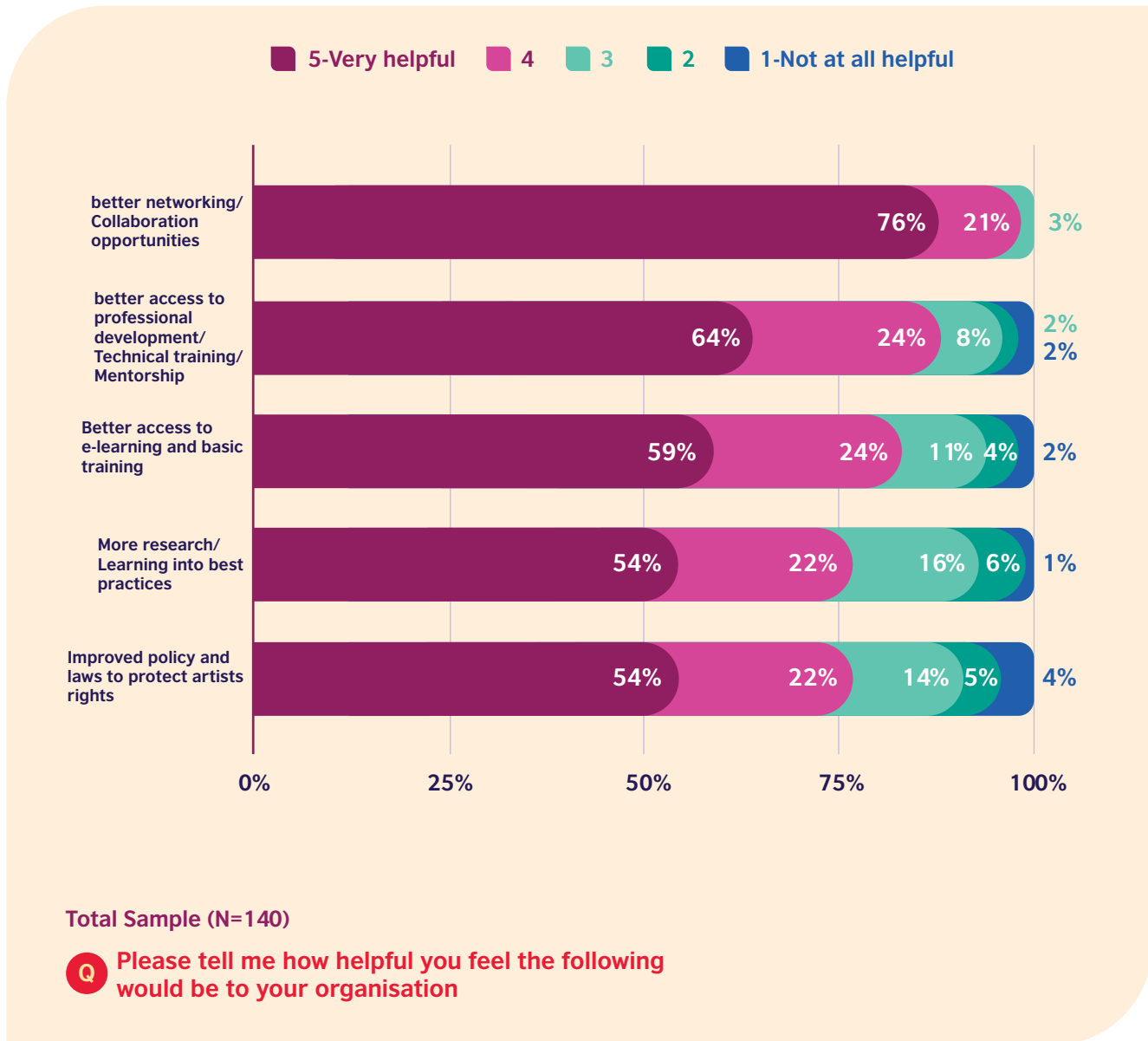
Whilst not asked as a challenge in the survey (rather as an opportunity for development), the lack of awareness around supportive policy, laws, and artists’ rights came up frequently with creatives from across the sector.

The lack of consistency with Ministry alignment has created a situation (perceived or actual) where creatives do not feel they have a strong voice advocating for their needs at a policy level “to the top”

as they see in other sectors.

The current level of awareness of the rights protection available for artists and creatives (i.e., the copyright law and the IP register operated by the RDB) was not top of mind or well understood by artists with many, including photographers, illustrators and musicians being unclear what protection was provided and how to access either protection or recourse.

Table 18: Appetite for sector support



The final question to survey respondents asked about the appetite for support across these challenges discussed. Table 18 shows that support was strong

across all themes, with over 70% of those asked stating they would find support across these areas helpful / very helpful.



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