

# Evaluation Report

## Assessment of the Culture Market for Somalia and Northeastern Kenya

December 2021



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Federal Department of Foreign Affairs FDFA, Embassy  
of Switzerland in Kenya



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## Table of Contents

<b>Executive Summary.....</b>	<b>iv</b>
<b>1 Background of the Study.....</b>	<b>7</b>
1.1 Introduction .....	7
1.2 Objectives of the Market Systems Assessment.....	7
1.3 The Market Systems Development (MSD) Approach.....	7
1.4 Precedent Programmes – SDC HoA Programmes and Others.....	8
1.5 Overview of the Culture Market in Somalia, Somaliland, and NE Kenya .....	9
1.5.1 The Somali Culture Industry in Kenya (North Eastern & Nairobi) .....	9
1.5.2 Somalia Culture and Creative Market .....	10
1.5.3 Somaliland Culture and Creative Market.....	10
<b>2 Methodology and its Limitations.....</b>	<b>11</b>
<b>3 Market System for the Selected Sub-Sectors .....</b>	<b>12</b>
3.1 Demand-Side (Culture Products and Services Consumers) .....	12
3.1.1 Definition of the Target Audience .....	12
3.1.2 Culture Products and Services-Seeking Behaviour .....	13
3.1.3 How the Target Group Pays for (or Acquires) these Products and Services .....	13
3.2 Supply Chain.....	20
3.3 Competitive Dynamics within the Core Functions .....	20
3.4 Supporting Functions .....	20
3.5 Culture Sub-Sectors with Commercialization Potential .....	21
3.6 The Rationale for Intervening in the Above Sub-Sectors .....	23
3.7 Stakeholders Analysis.....	23
3.7.1 Gender Considerations.....	25
3.7.2 Key Risks.....	25
<b>4 Sustainability Analysis (Who Does, Who Pays?).....</b>	<b>26</b>
4.1 Implications .....	27
<b>5 Constraints Analysis .....</b>	<b>29</b>
5.1 General constraints on CCI in order of intensity in affecting the market .....	29
<b>6 Proposed Intervention Opportunities .....</b>	<b>31</b>
6.1 Intervention areas of highest potential .....	31
6.2 Family Entertainment .....	31
6.3 Stand-Up Comedy.....	31
6.4 Women Handcraft Association.....	32
6.5 Talented Youth on Dance, Music and Poetry .....	32
6.6 Characteristic of the cultural Market .....	37
6.7 Phased Approach .....	37
6.7.1 Phase 1: Designing Phase: 3 – 6 months .....	37
6.7.2 Phase 2: Network formation, Skills building and hardware and software acquisition through partnerships .....	38
6.7.3 Phase 3: Consolidation of Business market.....	38
6.8 Conclusion .....	38
<b>7 Annexe.....</b>	<b>39</b>
7.1 Annexe 1: Comprehensive list of constraints.....	39
7.2 Annexe 2: Potential Intervention Areas Against Constraints Addressed.....	40

7.3	Annex 3: List of key informant interviews .....	42
7.4	Annex 4: Interview Guide – Culture Products and Service Providers .....	43
7.5	Annex 5: Selected photos from Wajir .....	44
7.6	Annex 6: Selected photos and video from Hargeisa .....	46

## Tables

Table 2-1	Key informant interviews by category .....	11
Table 3-1	Kenya Culture Sector Funding Trends for 2017/18 – 2019/20 Fiscal Year in KSH Millions. ....	14
Table 3-2	Public Sector Stakeholders .....	17
Table 3-3	Private Sector Stakeholders.....	18
Table 3-4	High potential areas .....	22
Table 3-5	Stakeholder Analysis.....	23
Table 4-1	Current Market .....	26
Table 6-1	SDC Culture Market Assessment: Estimated annual investment for Potential intervention .....	34

## Figures

Figure 1-1	The market systems ‘donut’ .....	8
Figure 3-1	CCI Market System Development Donut .....	12
Figure 6-1	Impact Effort Matrix .....	33

## Executive Summary

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SDC commissioned Cardno to map out culture market structure and performance in Somalia, Somaliland, and North-Eastern Kenya, analyse how different culture market sub-systems are interconnected and/or structured, and assess the thickness and vibrancy of the culture market to determine if a Market Systems Development (MSD) approach might be deployed to create concrete results, as measured by the potential to yield impact (relevance) and success (effectiveness) in the coming years.

The development of the culture and creative industries (CCI) is of particular interest to the region. It is emerging as a dynamic economic sector offering vast opportunities for cultural, social, business, and technological activities. The creative economy holds potential for Somalia, Somaliland and Northeastern (NE) Kenya to transform untapped creative resources into economic growth. For example, the craft industry can accommodate a large workforce and create jobs, increase export earnings, and promote social inclusion and cultural exchange.

At a time of continual social and political unrest across the region, supporting cultural activities can play a key role in strengthening social cohesion, promoting shared cultural values, fueling economic growth, and, perhaps most importantly of all, giving people a sense of pleasure, enjoyment, and intellectual stimulation. Like anywhere in the world, cultural self-expression is an integral part of how Somalis see themselves and for how the rest of the world sees Somalis. As one key informant put it, external recognition of Somali culture will help to promote a more confident image of a region that has been beset by conflict and violence for decades.

This brief assessment was aimed at identifying key entry points for SDC's future culture market programmes. The team gathered important insights into how the culture market system operates and functions from an MSD perspective and framework. It also adds more insights from anthropological perspectives.

The current SDC strategy in the Horn of Africa builds on previous results that have been achieved in the region and emphasize Switzerland's commitment to sustainable, relevant, and effective intervention. In this regard the team has identified significant opportunities for MSD interventions, with potential opportunities to intervene through a system approach on cultural crafts, women's cultural entrepreneurship development, video production and photography, training and capacity building, cultural music, and dance, building and strengthening institutions and networking, and building shared values across the region through awareness creation workshops and media. The MSD approach emphasizes understanding core supply and demand functions in the context of a comprehensive market system, in which interrelated players influence the performance of the value chain. This evaluation endeavours to explore all of the culture and creative market actors to understand the key constraints and identify sustainable solutions.

The methodology used both primary and secondary research to achieve the objectives of the study. This included, but was not limited to, desk review of reports, proclamations, policies, regulations, and strategies and programs, online interviews, and field missions which led to face-to-face key informant interviews (KIIs) and observations in different areas of the targeted region. Due to security reasons, a field visit was not undertaken in Mogadishu, but interviews were conducted there virtually.

## Key Findings

This rapid assessment found that SDC interventions should be directed towards building capacity, creating integration and collaboration, promoting awareness of the value of the sector, and integrating vulnerable and marginalized groups into markets. SDC's use of the MSD facilitation approach can create the conditions under which market actors can innovate and adapt to changes in market trends or the enabling environment without direct project support, through a focus on building capacities, strengthening relationships, and aligning incentives in pursuit of shared objectives (values). Where direct support of infrastructure and equipment and targeted financial resources are needed to develop the culture market, permanent market actors such as businesses, communities, government entities, and cultural foundations should be encouraged to provide this support.

Future SDC culture projects may therefore focus more on stimulating pressure points within market systems (or their interconnected systems) to encourage changes that support increased competitiveness rather than taking the strategy of directly encouraging individuals to adopt change. Potential programme interventions may take several forms but could include working with media and influential business and/or community leaders to incentivize a change process. It could include encouraging traditional handcraft business and socially acceptable family entertainment content; encouraging collaboration with media and credit associations; strengthening communication and trust among market actors; recognizing the benefits of diversified products and markets; identifying the nature and structure of the societies Somalis live in. SDC can facilitate increased demand for handicrafts, family and children's entertainment content, paintings, books, and video productions.

## Potential Areas of MSD Intervention

### A. Capacity building and promotion

- > Capacity building and training on creative skills (painting, poetry, crafts, video production, literary art)
- > Awareness creation on the values of art and culture (public discussions and workshops)
- > Training on cultural entrepreneurship, marketing, and sales
- > Building the capacity of cultural intermediaries, journalists, bloggers, radio/producers to support the promotion of CCI
- > Motivating youth to be involved in art enterprises
- > Promoting the shared values of Somali people living in all three zones in Kenya, Somalia and Somaliland through creative art and culture

- > Facilitating access to high quality working equipment and space for cultural enterprises
- > Developing opportunities and structures for elders to pass the indigenous knowledge to the young generation
- > Digitizing the cultural market

**B. Strengthening networking, collaboration, and partnership**

- > Creating networking opportunities and facilitating market actors to form associations such as an art forum or a cultural investment forum
- > Organizing suppliers of handicrafts for the market
- > Identifying additional potential domestic (and foreign) consumer markets
- > Identifying specific outlets for traditional items (crafts, music, dance, poetry)
- > Supporting cultural intermediaries to operate as facilitators of success in the CCI; entry to the market is often high through established intermediaries. This would generate direct income for local actors (including women and youth), which creates convincing evidence for future investment.
- > Facilitating access to credit and loans to encourage CCI startups
- > Facilitating dialogue with governments to boost the culture sector including creating a strong enabling environment

Generally, there is an opportunity for the CCI market to have a strong capacity to learn, adapt and change to increase the chance of growth and access to opportunities for Somali people ( and everyone else in this market).

# 1 Background of the Study

---

## 1.1 Introduction

SDC considers culture a part of the development and a catalyst for social transformation. In its efforts to contribute to the reduction of poverty and inequality, SDC seeks to identify and build on the cultural resources, local knowledge, and creative forces on hand in the societies where it works. As a rule, culture promotion initiatives aim to strengthen local cultural identity, social cohesion, and intercultural exchanges in partner countries. They stand for contribution to the richness and diversity of local cultural life.

In the Horn of Africa (HoA) region, SDC has been supporting short-term culture initiatives since 2013. However, in 2020, SDC decided to establish a more sustainable culture programme. This began with an assessment of the culture sector of the Somali community in the three countries of the HoA. The assessment determined key entry points for SDC to establish a long-term (12 years) culture programme in the HoA region. The long term aim is to fully harness the potential of the culture and creative sector actors and assess the possibility of developing new forms of collaboration. SDC will pay particular attention to the principles of subsidiarity and non-distortion of markets.

The culture and creative sector programme seek to explore the adoption of a Market Systems Development (MSD) approach with the general objectives of making the sector sustainable to reduce donor dependency and create employment opportunities for women and youth.

## 1.2 Objectives of the Market Systems Assessment

Cardno was tasked to conduct a high-level broad analysis of the culture market of the target regions, to assess if an MSD approach would be able to yield concrete results. The assignment follows two main recommendations of SDC's Culture Sector Evaluation for the Horn of Africa (March 2021):

1. SDC to invest in activities that encourage collaboration between organizations, through partnership ventures with culture associations that organize recurring cultural events.
2. SDC to undertake a thorough assessment of the culture creatives industry to identify barriers to economic growth and opportunities for job creation for women and youth.

Based on the two recommendations highlighted above, the assessment had the following objectives:

- > Map out culture market structure and performance (core, supporting functions and the rules).
- > Map out and analyze how different culture market sub-systems are interconnected and or structured.
- > Assess thickness/thinness and vibrancy of the culture market; assess if interventions in the two areas of recommendation given the current culture market have a high potential to yield impact (relevance) and success (effectiveness) in the coming years

## 1.3 The Market Systems Development (MSD) Approach

Market Systems Development is an approach to developing markets so that they function more effectively, sustainably, and beneficially for poor people. In MSD, poor and disadvantaged groups are considered active



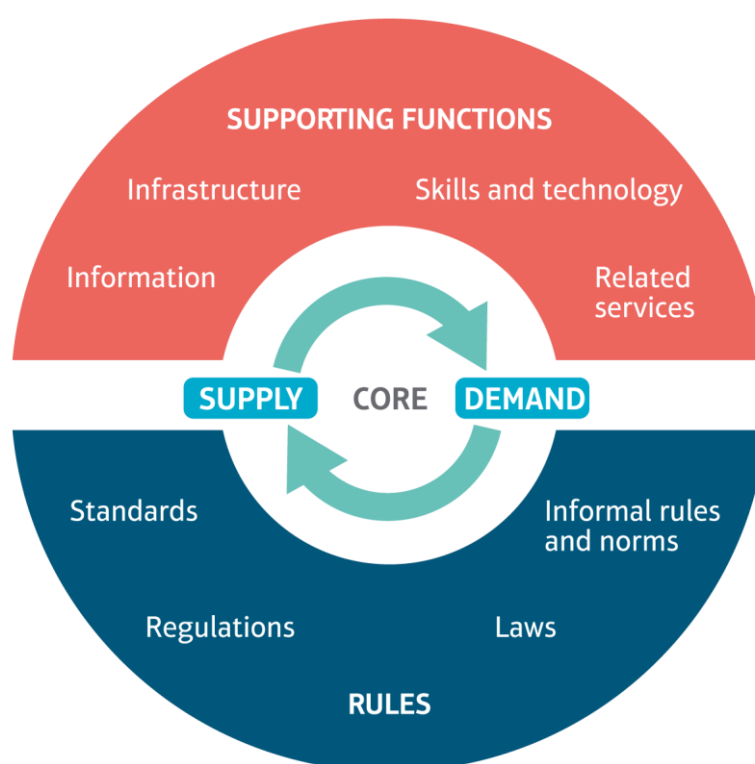
market participants as opposed to passive beneficiaries. MSD involves guidance on how to analyse markets as well as how to intervene in them by addressing underlying causes (rather than symptoms) of weak performance. The analysis informs actions.

MSD answers some important development questions such as:

- > What happens after the donors exit and the donor money dries up?
- > How do we ensure that economic growth benefits all, not just those at the top?
- > How do we logically connect development programming with lasting systemic change?

A market system may be diagrammed using the 'donut' (developed by the Springfield Centre under SDC guidance) which shows the core supply and demand functions surrounded by supporting functions and rules and regulations in an interdependent ecosystem. An important distinction between MSD and more traditional development approaches is that MSD programs seek to stimulate or facilitate change through existing market actors, rather than directly delivering solutions. Consequently, improvements are not dependent on continued donor support

Figure 1-1 The market systems 'donut'



Source: The Springfield Centre

## 1.4 Precedent Programmes – SDC HoA Programmes and Others

SDC has provided support to various cultural activities and events in the HoA region with mixed outcomes. These projects were typically short term, low budget, and targeted in their outcome. Since 2013, small scale projects that ran for about 18 months with small budgets fostered tangible results but were typically one-off. For

instance, the *Art for Inclusion* in Somalia project showed a lot of value and appreciation in linking to social cohesion and peaceful co-existence. There is a growing realization that collaboration with other partners and putting funds together to support events work well in improving coordination. Further, building synergies with other SDC offices (Ethiopia and HoA) it seeks to cover the Somali community across the Horn of Africa.

## 1.5 Overview of the Culture Market in Somalia, Somaliland, and NE Kenya

The Somali community that inhabits the Horn of Africa has an incomparably rich and thriving cultural heritage despite decades of political, social and economic unrest.

The Somali culture and creativity space span activities across both tangible and intangible cultural heritage. At the height of Somalia's prosperity and nationhood, the Somali artist thrived, the government provided a strong enabling environment through laws and policies that provided freedom of expression, and artists made a living out of their work. Somali audiences welcomed and rewarded creativity and quality of content. Somali poems and songs of the past are still highly sought after. The quality and content of the current generation of artists are considered foreign by the Somali audience, which discourages young artists and restricts investment in the industry.

### 1.5.1 The Somali Culture Industry in Kenya (North Eastern & Nairobi)

In Kenya, the Somali community has an official unique identifier "Kenyan Somali" to differentiate them from Somali refugees in Kenya. This tag is viewed as discriminative and denotes an "outsider" identity. The Somali culture industry in Kenya is underdeveloped and has not been a priority for the national government since independence. The national museums and the national theatre have limited information and artefacts since the Somali region was not a focus for the tourism industry, which is a major driver for cultural growth in Kenya. With devolution, UNESCO<sup>i</sup> observes that many counties in Kenya are now developing local county culture policies and legislations which focus on local priorities.

The counties of North Eastern(NE) Kenya have showcased the local culture in cultural festivals and at the Somali Heritage Week featured at the national theatre. The business sector realizes the potential of Somali cultural events and in July 2021, the Two Rivers mall in Nairobi hosted a Somali Cultural Festival. The event menu included performances, expositions, conferences, and concerts, and gave external vendors a chance to market their products and services in pop-up markets. The event was highly successful, recording more than KSH1 billion in sales (approximately US\$10 million), underscoring the commercial potential of such cultural events<sup>ii</sup>. The mall has now included this event in its annual calendar.

Nairobi is home to a significant population of Kenyan Somalis as well as Somali refugees. The population congregates in the Eastleigh district which has thriving business and cultural activities. The city is also a favourite with Somali diaspora returnees who are looking to educate their children on the Somali culture. The demand to learn about the Somali culture has resulted in the establishment of AwJama Cultural Centre and open events such as the Somali Heritage Week. There is also emerging young talent in music and poetry.

In the private sector, the comedy sub-sector continues to grow rapidly and remains commercially viable. The sector is still unregulated and there are concerns over the quality of content and age limit to the live shows. The Music Copyright Society of Kenya (MCSK) and other regulators lack sufficient resources to enforce compliance

with the laws and regulations. Even though many budding young artists are emerging within the Somali community, they are yet to package their talent to be commercially viable.

### **1.5.2 Somalia Culture and Creative Market**

In Somalia, some elements of the culture sector such as music thrived in the last decades of war. The growth and economic viability of the music sector were driven by diaspora groups and communities that eased the artists and paid for their services.

Governments of Somalia set up dedicated ministries and state institutions responsible for the promotion and preservation of the Somali culture. In collaboration with local populations, artists, and international partners, these ministries have enhanced efforts to reconstruct the national cultural traditions and institutions. In Somalia, the president led a national volunteer programme dubbed “*Is xilqaan*” to reconstruct the Somalia National Theatre and Museum. The National Theatre is now open yet to become fully operational, which would allow Somali artists to showcase their talent and perform their work – partly because of the impact of COVID-19 in Somalia and limited partnership to support the theatre to provide common facilities for the local artists. In Somalia, the Mogadishu Book Fair is a well-known event conducted by the New Horizon nonprofit organization which brings together writers, academicians, educators, scholars, publishers, and book store owners for the exchange of information, ideas, and knowledge. It is also a good platform as the marketplace for book stores and publishers to promote and advertise and boost sales.

### **1.5.3 Somaliland Culture and Creative Market**

The Somaliland National Theatre is yet to rebuild, but vibrant new institutions exist like the Hargeisa Cultural Center, which was opened in August 2014 with the support of the Red Sea Cultural Foundation (RCF). Since its establishment, the Hargeisa Cultural Center has become an important feature in Hargeisa’s cultural landscape. The success of the centre owes much to the respect that RCF has gained from its work on running the annual Hargeisa International Book Fair – now in its eighth year, which has become one of the most admired cultural events in the region.

The culture industry across both Somalia and Somaliland experiences similar challenges that include fragmentation, weak national institutions, poor or absent legislation and regulations, and sustainability. This assessment will explore the inherent challenges and opportunities through a market systems lens.

## 2 Methodology and its Limitations

The team applied a qualitative primary study method that included both face-to-face and online key informant interviews (KIIs) as well as observations. Further, an extensive secondary desk review of the available literature was done. A total of 26 key informant interviews were conducted in the three target regions. Field visits to Somaliland and NE Kenya included onsite interviews and observation at key sites that included cultural centres, marketplaces, and museums. A detailed list of KIIs has been provided in Annex 3 of the report.

Table 2-1 Key informant interviews by category

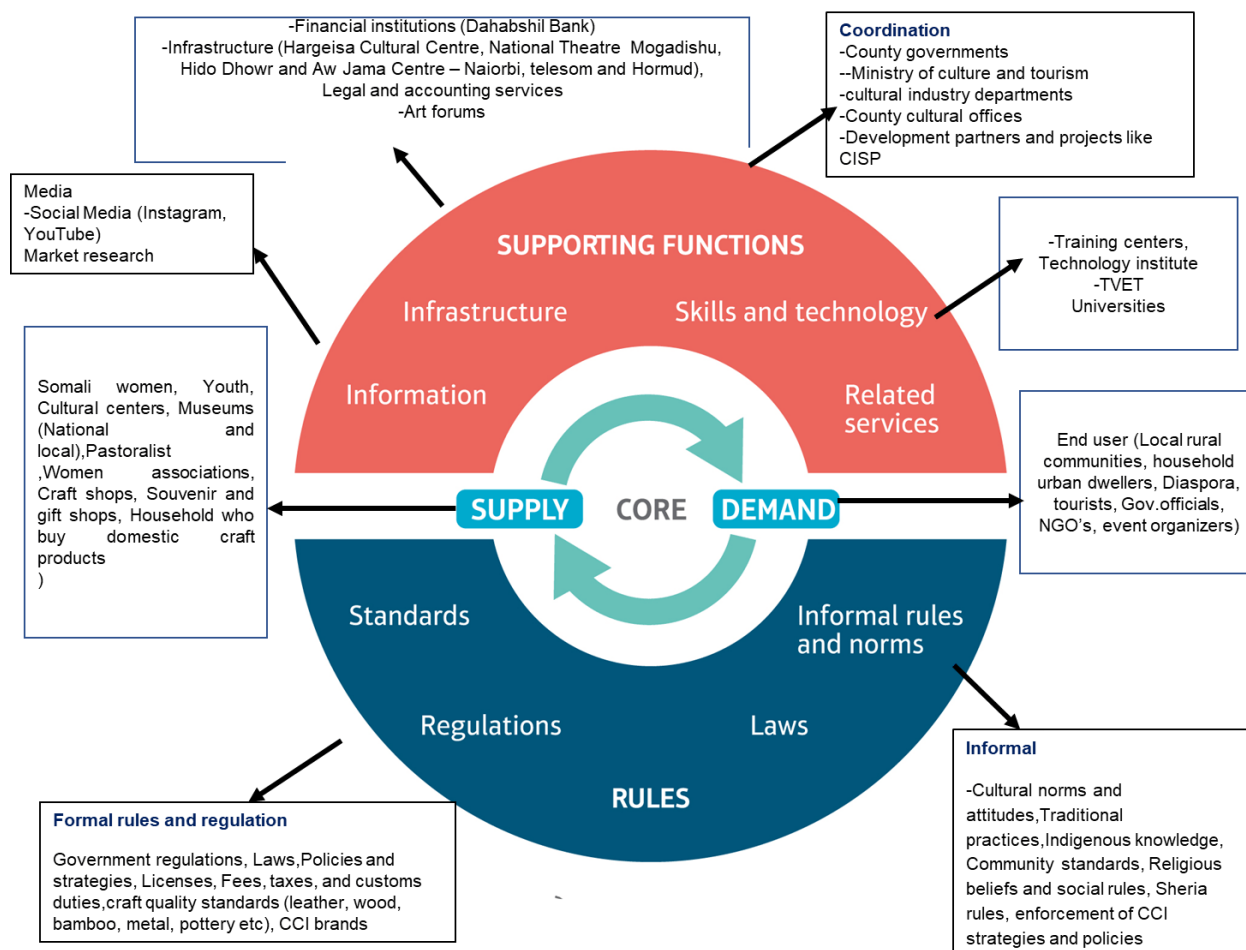
Category	
Comedians	2
County government officials	2
Cultural academy	1
Cultural centres and museums	4
Independent consultants	4
Local banks	1
Media/social media influencers	3
NGOs	1
Painters/handicrafts	3
Print media/books/publishers	3
SDC	2
<b>Total</b>	<b>26</b>

Limitations of the methodology: The rapid nature of the assessment focused on high-level interviews with key informants and desk reviews. A limited number of stakeholders were targeted based on purposive sampling and COVID - 19 and security travel restrictions. The team collected substantial information that is available as annexes to the main report.

### 3 Market System for the Selected Sub-Sectors

A summary of the key participants, rules and supporting functions in the CCI market is provided in figure 3-1. The interactions of all actors and functions and how they seek to facilitate pro-poor improvements in market operations, working with and through specific market actors who have the potential to generate change with the market is further discussed in the preceding sub-sections.

Figure 3-1 CCI Market System Development Donut



#### 3.1 Demand-Side (Culture Products and Services Consumers)

##### 3.1.1 Definition of the Target Audience

Cultural products and services have a wide audience within the Somali community. However, the trends are primarily influenced by the younger generation, women, and diaspora groups who depend on culture to connect to their homeland. Specific cultural products and services are popular among the youth such as music, drama, comedy, and dance, while poetry and traditional dances appeal to the elders.

Culture market players tend to focus on the high-end market for the sale of their services. Such markets are diaspora communities, the middle class, private corporations, and NGO or Government events that can pay for the services. The mass market of individuals and families offers huge growth potential but market players lack an understanding of their audience's needs and how to customize their products and services for them.

The high unemployment rate among the youth limits their purchasing power, thus requiring subsidies and incentives for them to access these services, often offered free of charge. Hargeisa Cultural Centre events and book fairs are free for now. As the event popularity grows, specific value-added side activities could be included that audiences will pay to access.

### **3.1.2 Culture Products and Services-Seeking Behaviour**

Youth access cultural products and services through social media, TV and radio stations and events in the community such as the Hargeisa Book Fairs, Somali Cultural Festivals, et al. Social media influencers such as Vloggers have a huge youth following, which can be quantified in future studies. Live performances and social gatherings in Mogadishu are less popular due to insecurity, however, the recent opening of the National Theatre provides an avenue for passionate audiences to access live performances and artistic expressions.

The decision to consume cultural products and services is personal. Somali communities rely on their culture to express their identity and are proud of their heritage and values. Social norms control the content. The products that conform with the social and religious norms are widely acceptable and commercially viable. Traditional culture and values are propagated and preserved by rural communities. The urban population is widely influenced by modern trends but identifies with their culture through live events, as well as content on YouTube. The urban population will pay for the services while the rural demand free access.

There are regional variations in the popularity of various cultural products and services. The culture and creative industry are more developed in Somalia and Somaliland than in NE Kenya. The Somaliland population's prowess in poetry is unmatched. The existence of infrastructures like theatres, cultural centres and training institutions in Somalia and Somaliland provides a platform for the local artists to actualize their potential, unlike in NE Kenya.

In terms of gender and age differences, women are more involved in handicrafts, men in blacksmith and youth (both gender) in music and drama.

### **3.1.3 How the Target Group Pays for (or Acquires) these Products and Services**

Cultural products and services are accessed and paid for through sponsorships and direct cash sales at the events venues, cultural centres, or artefacts shops. Unlike other social programmes like education and healthcare, culture sector services are generally not subsidized by the state or third-party entities like NGOs. The individual artists may host events and charge the revellers entry fees affordable to the economic status of the target population.

### 3.1.3.1 Sources of Funds (Where the Money Comes From)

#### Public Sector (Formal Sector)

The public sector relies on government budgetary allocation. In Kenya, no non-state actors are supporting the sector according to the sector performance report (2021/22 – 2023/24). The culture sector is not part of the *Big Four Agenda* or part of the core pillars of *Vision 2030*, which directs the government's strategic investment. Limited data is available on the National Government expenditure on culture. The Social Protection, Culture and Recreation Sector Report (2021/22 – 2023/24) provides some information on the sector funding as shown in table 1. Unfortunately, this is a limited allocation that covers staff emoluments and recurrent expenditures for the existing infrastructure. Budgetary allocation and expenditure at the 47 devolved governments tasked with the promotion of the local culture are not available.

Table 3-1 Kenya Culture Sector Funding Trends for 2017/18 – 2019/20 Fiscal Year in KSH Millions.

Culture	Approved budget (in KSH millions)			Actual Expenditure (in KSH millions)		
	2017/18	2018/19	2019/20	2017/18	2018/19	2019/20
Sub-Programme 1.1 Conservation of Heritage	1,070.80	1685.1	2,014.28	1,069.19	1685.1	1,918.76
Sub-Programme 1.2: Public Records and Archives Management	134.34	192.35	145.08	125.68	171.17	130.91
Sub-Programme 1.3: Development and Promotion of Culture	250.43	206.15	132.84	240.75	175.17	114.41
Sub-Programme 1.4: Promotion of Kenyan Music and Dance	95.83	145.93	0	90	78.3	0

In Somaliland, The Ministry of Information and National Guidance has a dedicated action plan for the fiscal year 2020 – 2021 that outlines the country's investment priorities in the promotion of creative arts and film industry. The team did not access the Ministry's 2021 budget to find the budgetary allocation to culture and creative activities in the action plan. There was no information on the Federal Government's allocation for the sector.

#### Donors and NGOs

Key informants acknowledged the occasional support of various donors and UN agencies. Specifically, the 2014 Somalia Cultural Festival was supported by various donors including USAID, GIZ, the Embassy of France, and UNPOS(UNSOM). UNESCO is providing technical support to the Federal Government of Somalia in the development of the Culture Sector Strategic Plan. In Somaliland, the annual Hargeisa International Book Fair is supported by the EU, UN-Habitat, and SDC among others. The team observed the presence of CISP(an Italian NGO) as one of the implementing agencies in Somalia.

Information on the amount of money committed by these donors and the duration of support was not available. But according to the director of the Hargeisa Cultural Centre, these budgets cover operational costs.

## Private Sector

In Kenya, the team observed, that the private sector is actively involved in the conduct of Somalia Cultural Festivals through sponsorships. Somali owned companies and large corporations such as telecoms (Safaricom) and banks (Gulf Bank, First Community Bank) are regular supporters. In Somalia and Somaliland, the Hargeisa and Mogadishu International Book Fairs also attract sponsorships from local banks (Dahabshil, Premier Bank), telecoms (Telesom, Hormud, Somtel) and other businesses such as the Hyundai franchise in Hargeisa. Dahabshil bank proposed the opportunity for microloans and schemes for the art sector like craft in Hargeisa. This can be provided within the boundary of social impact policy, guidelines, and sharia-compliant. In this guideline, there will be repayment modalities for the cultural and creative sector specially crafts.

## Informal

Like most startups, family and friends are the primary sources of funding for startup capital for the culture and creative industry. *“Getting a Ksh 30,000 (USD 300) loan from a bank or other lenders is nearly impossible, I was solely supported by my family and friends to raise startup capital. The same may be true for all other artists”*  
Female Respondent, Nairobi

Rotating savings clubs (Hagbad/Ayuuto): The Wajir women’s group involved in the production and sale of traditional Somali hut building materials runs an informal saving platform for its 40 members. The funds are given to specific group members on a rotating basis to boost their stock and expand their market. But such a collective saving approach does not grow one’s savings and is thus inefficient. According to a female Somali artist based in Nairobi, access to funding is still a major constraint for young artists to develop quality programmes and build strong brands. She recommends event sponsorships or the provision of Interest – free loans customized to the specific artists’ needs as the most practical funding options to grow their business.

Diaspora remittances (estimated at 31.4% of the GDP in 2020)<sup>1</sup> are a big driver in the culture market. Annual cultural events are usually held in the summer to coincide with the peak arrival of diaspora communities. Individual artists are invited to stage live performances for Somali audiences in Europe and the US. Social media and crowdfunding opportunities are used by all categories of Somali artists, cultural centres, and publishers for creating awareness and increasing ticket sales for specific events. Online media has a high potential to reach large audiences to generate sales and attract advertisements opportunities.

### 3.1.3.2 Culture and Creative Sector Products and Services Providers

## Public Sector

The culture and creative infrastructure are being rebuilt. In Somalia, a national volunteer programme dubbed *“Is xilqaan”* mobilized support (in the form of donation of building materials and labour) from both public and private sectors for the reconstruction of the Somalia National Theatre and Museum. The National Theatre is now open and yet to become fully operational, which would allow Somali artists to display their talent and

<sup>1</sup>Federal Government of Somalia (2021). Somalia Socio-Economic Impact Assessment (SEIA) of COVID-19, March 15, 2021



perform their work – both because of the impact of COVID-19 and limited partnerships to support the theatre to provide common facilities for local artists. Across the regions (NE Kenya, Somaliland, and Somalia), there are dedicated ministries at the national and county level responsible for culture. These service providers are mapped, described, and their relationships are shared in the table below

Table 3-2 Public Sector Stakeholders

Stakeholder	Functions	Description	Location(s)	Relationship to Other Stakeholders	Specific Incentives or Special Interests
The Ministry of Sports, Culture and Heritage - Kenya	- The promotion, revitalization, and development of all aspects of culture - Regulations	Government entity	Nairobi	-Coordination -Regulation - Monetization of cultural activities -provide technical (policy) support to the county Culture department	Focus on traditional tourism markets such as Maasai, Somali region is not a Tourism destination
County Department of Culture – Wajir, Garissa and Mandera	- The promotion, revitalization, and development of all aspects of local culture - Regulations	Government entity	Specific County HQs	-Coordination -Regulation - Monetization of cultural activities	Promotion of their specific county culture products and services
The National Museums of Kenya	-Interpretation of rich heritage -offer one-stop for visitors to sample the local heritage	Government entity	Nairobi, Wajir Branch	-platform for performances -Marketing of local cultural products and services	Collect and preserve Somali artefacts (Wajir Museum)
Kenya National Theatre	-offer space for the rehearsal and staging of productions to both local and international repertoire	Government entity	Nairobi	-platform for performances -Marketing of local cultural products and services	
The Somali National Theatre	-offer space for the rehearsal and staging of productions to both local and international repertoire	Government entity	Mogadishu	-platform for performances -Marketing of local cultural products and services	Weak institutional capacity to provide technical support
Federal Somalia Ministry of Culture	- The promotion, revitalization and development of all aspects of culture - Regulations	Government entity	Mogadishu	-Coordination -Regulation - Monetization of cultural activities -provide technical (policy) support to the county Culture department	The culture department is not a state priority in funding
Ministry of Information and National Guidance – Somaliland	- The promotion, revitalization, and development of all aspects of culture - Regulations	Government entity	Hargeisa	-Coordination -Regulation - Monetization of cultural activities -provide technical (policy) support to the county Culture department	The culture department is not a state priority in funding
Swiss Development	Funding and Technical Assistance	Donor	Nairobi	Strategy Coordination, development,	SDC's has a long term interest in culture sector growth

Cooperation (SDC)					
EU	Funding	Donor	Nairobi, Mogadishu	Strategy Coordination, development,	Adhoc support
CISP	Culture project implementation	NGO	Mogadishu	Coordination, development, Implementation	Project cycle-related interest

### Private Sector

The private sector is the dominant player in the development and provision of culture and creative industry products and services across the region. The involvement of the private sector ranges from production (crafts, comedy, media, et al.), preservation or reactivation, distribution, and marketing. The private sector's presence is most felt in Somaliland and NE Kenya. Hargeisa Cultural Centre and Hido Dhowr centres are notable examples in Somaliland. The infrastructure is not as developed in NE Kenya.

The private sector's presence is most felt in Somaliland and NE Kenya. Hargeisa Cultural Centre and Hido Dhowr centres are notable examples in Somaliland. The infrastructure is not as developed in NE Kenya.

The private sector is also the key financier of the culture sector. Major corporations like Safaricom, Telkom, Dahabshil and local banks finance the hosting of the Somali cultural festivals across the regions. These relationships could (and should) be strengthened to provide local revenues for cultural enterprises. These service providers are mapped, described, and their relationships are explained in the table below.

Table 3-3 Private Sector Stakeholders

Stakeholder	Functions	Description	Location(s)	Relationship to Other Stakeholders	Specific Incentives or Special Interests
Hargeisa Cultural centre	A cultural hub and Centre for art performance and consumption	Private cultural entity	Hargeisa Somaliland	Infrastructure to display talent, collect information and preserve important heritage materials	To stimulate the revival of art and human expression among Somalis and preserve the heritage
Hido Dhowr Centre – Hargeisa	Culture restaurant and Centre	Private cultural entity	Hargeisa, Somaliland	Platform to access culture products and services	Hosting artists to display their talent and get revenue
New Horizon Bookfair	Bringing together authors, scholars, poets, publishers, and the public. They focus on literacy	Local NGO, Non-profit	Mogadishu, Somalia	Promotion of Knowledge sharing and interaction to explore different writers, academicians, educators to promote reading culture	Reading for pleasure & knowledge, Keep culture alive and hence the culture of reading books Advocation for quality of education Used for peacebuilding through books and culture
Aw Jama Centre	Culture research and reading center. Hub for	Private cultural	Nairobi	Providing a conducive environment to develop cultural	Targeting women and youth in the communities and providing platforms

	preservation and celebration of the Somali culture	research centre		initiatives by providing relevant reading materials and research programs	aimed at enhancing entrepreneurship skills for purposes of sustainable development
	Independent Actors				
Media Stations- Radio and TV	Inform, educate, and entertain with its widest audience footprint as it reaches millions	Both Government-owned and private	In all the 3 regions	Platform to reach out and disseminate information	Faster turn-around of information
Video and Photography	Record or preserve the history		-NEK -Somaliland -Somalia	Capture the history and connect to the past. Photos and Videos communicate and document moments in time	Record life's greatest moments and there is a story behind every image... whether still (photo) or video
Standup Comedians	Entertainment and educative	Private cultural entity	-NEK -Somaliland -Somalia	Entertainment,	Revenue generation and dissemination of information and educative
Musicians and Singers	Music always serves as a social function providing identity and opportunity	Entertainers and provide services to the audience	-NEK -Somaliland -Somalia	Entertainment and suppliers of artistic product/ services	Revenue generation and dissemination of information and educative
Social Media Content Influencers – YouTube, Tick-Tok	Communication and information dissemination	Help discover what is new and trending from music to culture to internet phenomena	-NEK -Somaliland -Somalia	Entertainment and also a platform for artists to display their talent and also market their products and services	The primary focus is marketing and revenue generation
Painters	Communication, teaching and a vehicle for learning	Method of expressing oneself	-NEK -Somaliland -Somalia	Vehicle for teaching and learning	Revenue generation and communication.
Traditional Artefacts	To reveal valuable information about the society that made it or uses it	Traditional artefacts are things made by traditional communities	-Wajir -Hargeisa	Cultural product for consumption/ selling	Revenue generation and cultural preservations
Traditional dancers	Traditional dancers always serve as a social function providing identity and opportunity	Entertainers and provide services to the audience and educative messages	-NEK -Somaliland -Somalia	Entertainment and suppliers of artistic product/ services	Revenue generation and dissemination of information and educative

**Professional/Services Provider Networks.** None exist, but there is a weak professional association of journalists.

### 3.2 Supply Chain

The region lacks an organized or formalized supply chain for the culture and creative sector products and services. Local artists run independently with minimal government regulation. Local content is produced and distributed to the market without regard for professional standards. Contents produced by one company could be adopted and used by all media outlets or copied and distributed by local cyber cafés or electronic shops without regard for copyright.

Raw materials used in the production of traditional artefacts such as highly endangered plant species and riverine growing trees that are harvested adversely affect the environment. The traditional craft market is not organized, but shops collect different craft materials made of wood, leather, grass, and plant leaves and sell them. These items are produced by rural women and men individually, mostly in rural areas and then sold to shops in towns. Men from minority and vulnerable members of the community engage in the professionally hazardous blacksmith business with limited access to scrap metals – their primary raw material.

Equipment and supplies: The production of crafts is not large; this is due to skill limitations and many Somali people are not willing to buy their own traditional items. In Wajir, there is a museum that collects artefacts and there are women's groups that produce crafts for sale. From the team's observation, the supply chain for craft products is weak.

### 3.3 Competitive Dynamics within the Core Functions

#### **Dominant or Controlling Players, Monopolies**

Across the three regions assessed, the government is a key player, albeit of limited interest in terms of funding and regulation. The market is highly fragmented and market forces primarily determine its course. In Somaliland, Hargeisa Cultural Centre and Hido Dhowr centre are key players. The National Theatre and New Horizon Bookfair are training blazing in Somalia. In Kenya, the Aw Jama Cultural centre in Nairobi and women groups in NE Kenya drive the culture sector.

There is an emerging list of individual artists that include comedians, painters, media content developers, and social media influencers. The only female Somali stand-up comedian – Nasra Yussuf – is a market leader. Hassan Cameroon Media in Mandera, a production company, commands a strong following, while Asmaili Media's strength is in organizing large Somali cultures vents – such as the Somali Cultural Festival in Kenya.

### 3.4 Supporting Functions

The culture industry is unregulated in Somalia and Somaliland, while enforcement of existing regulations is poor in Kenya. There is an absence of professional and provider associations.

The lack of inspection bodies for testing and certification in Somalia is a significant gap in the culture system. Typically, the market is left to regulate itself. The media sub-sector has a weak presence of journalist

professional associations. The Federal Government of Somalia's ministry responsible for culture is developing a strategic plan that is expected to prioritize the development of policies and regulations that create enabling environment for the growth of the sector. Practitioners in the culture sector are unlicensed and access to legal services (e.g., for intellectual property protection) is limited.

Local social norms and religion play a key role in regulating the market. Production and distribution of media content and artefacts that go against religious norms are highly discouraged and could attract social rejection or even violent public reaction.

### **3.5 Culture Sub-Sectors with Commercialization Potential**

Respondents across the three regions agree on the existence of high commercialization potential in certain categories of culture products and services. From our assessment, we prioritized the sub-sectors with the highest commercialization potential as:

- a) Performing Arts – Drama, Comedy, Dance, and Music
- b) Visual Arts – Craft, Photography, Videos
- c) Literary Arts – Oral poetry, Books and
- d) Media – Radio FM, TV Stations, Youtube Channels.

The details of the subsector activities with the highest growth potential are present below

Table 3-4 High potential areas

	Cultural domain	Cultural and creative product/services	Definition	Commercialization potential	Operators/producers	Comments
1	Performing Arts	<ul style="list-style-type: none"> <li>- Comedy</li> <li>- Drama</li> <li>- Music</li> </ul>	<ul style="list-style-type: none"> <li>- Standup comedy</li> <li>- family Drama</li> <li>- Music</li> </ul>	High	Youth Women Community group	Masses can attend the activity at a fee Requires Media outlets or social media
2	Visual arts and crafts	<ul style="list-style-type: none"> <li>- Fine arts</li> <li>- Photography</li> <li>- Crafts</li> </ul>	<ul style="list-style-type: none"> <li>- Traditional building material for a Somali Hut and blacksmith</li> <li>- Handmade paintings</li> <li>- Historical Photographs</li> </ul>	High	Youth Women Vulnerable/Minority groups	It needs training Many local people at the household level use the products
3	Social Media Content development	YouTube Tick – Tock Instagram, Facebook	<ul style="list-style-type: none"> <li>- Live Streaming of events</li> <li>- Video uploads</li> <li>-Editing etc</li> </ul>	High	Youth, Women and men with professional skills can participate	It needs more professional skills and training.
4	Literary Arts	<ul style="list-style-type: none"> <li>-Oral Poetry</li> <li>-Books</li> <li>-Newspaper</li> <li>-Library</li> <li>-Bookfair</li> </ul>	<ul style="list-style-type: none"> <li>-Orally transmitted artistic messages for entertainment, events, wedding, public ceremony.</li> <li>-Locally written or foreign books</li> <li>-Library and publishing</li> </ul>	-Medium  Medium	-Talented men and women with oral poetry  Talented youth or adults can be writers	Reading culture of the society must be boosted

### 3.6 The Rationale for Intervening in the Above Sub-Sectors

These are sub-sectors that have high commercialization potential through an MSD approach and are most likely to provide sustainable employment opportunities for youth, women, and vulnerable/minority groups. These interventions are popular across the regions thus attracting a huge following and market. Where direct support of infrastructure and equipment and targeted financial resources are needed to develop the culture market, permanent market actors such as businesses, communities, government entities, and cultural foundations should be encouraged to provide this support.

### 3.7 Stakeholders Analysis

The culture and creative industry stakeholders have been analysed to assess their power, interest, level of support for the sector, and engagement strategy. The level of support is ranked on the scale of 1 – 5 based on Level of support where 1. Is Unaware; 2 is Resistant, 3 is Neutral, 4 is Supportive and 5 is Leading. The key stakeholders and their analysis is detailed below

Table 3-5 Stakeholder Analysis

Stakeholder Group	Power	Interest	Level of Support for the Project	Engagement Strategy	Notes
SDC	HIGH	HIGH	5. Leading,	Active engagement	Power: SDC is one of the few funding agencies for the culture sector and holds considerable influence on its future. Interest: A successful programme following the success of short-term projects will inform long term investment decisions.
Other donors UNESCO, EU, UN Habitat etc	HIGH	HIGH	5. Leading,	Active engagement	Power: Closely works with the Government Institutions to develop regulations and capacity Interest: Overall sector donor coordination is weak.
Government Ministries. National, Federal and County	HIGH	MED	Ranges from 2. Resistant to 4. Supportive	Keep satisfied	Power: The National, Federal and County Ministries responsible for culture have the power to obstruct the programme if they are not satisfied. Interest: In general, they are a supportive investment in the sector. With proper communication, the government can understand and be fully supportive of programme contributions. There is the potential for the government to be resistant to the programme as it does not offer direct government aid and does not offer cash or financial support as do other donor programmes.
Artists ( All Categories)	HIGH	HIGH	2. Resistant to 4. Supportive 5. Leading		Power: The artist may decline to work with the project as they hold considerable influence on its future. Interest: A successful programme will only be achieved with their cooperation



					investment decisions.
Implementers (Private local Institutions and NGOs)	LOW	MED	Ranges from 1. Unaware to 2. Resistant to 3. Neutral	Keep informed	Power: Implementers have low power to stop or change the programme as they do not contribute financially, and it is not a part of a larger donor programme. Interest: Collaboration/Coordination among culture sector implementers is weak, primarily opportunistic coordination between individual implementers. Some implementers are unaware of the programme; those that are aware are primarily neutral. The possibility exists that some may resist the raised profile of the commercial private sector.
Commercial private sector	HIGH	HIGH	Ranges from 1. Unaware to 5. Leading	Active engagement	Power: The commercial private sector can make or break the programme. Deep participation will lead to successful outcomes whereas lack of interest will lead to failure, as the programme's MSD approach is dependent on market uptake. Interest: Many private sector players are as of yet unaware of the programme beyond consultations during SDC evaluation (March 2021) and this assessment planning phase research. Aw Jama Cultural centre is run out of Kenya, proving a cross-learning opportunity
Community groups, Leaders	HIGH	HIGH	2. Resistant to 4. Supportive to 5. Leading	Active engagement	Power: Community groups/leaders have the power to stop or change the programme. Interest: Community groups are primarily responsible for their culture and acceptance of the programme. Their support would be expected once they become aware.
Religious Leaders	HIGH	HIGH	2. Resistant to 4. Supportive to	Active engagement	Power: Religious leaders have the power to stop or change to the programme. Interest: at this stage, they are primarily unaware of the. Their interest would be expected to be high once they become aware.
Individuals Members of Society	LOW	HIGH	1. Unaware	Keep informed	Power: Individuals have little power to stop or change to programme. Interest: Individuals are primarily unaware of the programme beyond those interviewed during the assessment. Their interest would be expected to be high once they become aware.

### 3.7.1 Gender Considerations

Overall, the women of Somalia (approximately 50 per cent of the population)<sup>2</sup> are far from equal to men and are placed 4th highest on the global gender inequality index (Index: 0.776 where 1 denotes complete inequality).<sup>3</sup> Women bear an unequal brunt of the hardships occasioned by poverty, conflict, and clan-based culture which promotes strict hierarchy and authority. As a result, deeply rooted gender inequality prevails. Adult literacy in 2006 was 26 per cent for women compared to men at 36 per cent.<sup>4</sup> Women are lacking access to fundamental tools such as healthcare, education, and financial credit. However, Human Rights are guaranteed in the Federal Constitution and with federalism, steps have been made since 2020 by the establishment of a committee on women, human rights, and humanitarian issues in South West State<sup>5</sup> and other states are considering similar moves.

On economic empowerment, women in Somalia have a weak position in the labour market and represent a large proportion of vulnerable groups including those working in cultural handicrafts and music. Over the years, economically, women have made some gains expanding into employment and livelihood sectors traditionally held by men; women's participation in wage employment in the non-agricultural sector is highest in Puntland (40 per cent) followed by Somaliland at 36 per cent, and 33 per cent in South Central State.<sup>6</sup>

It is recommended that SDC's culture programme be mindful of the above-described gender-based barriers and how these may limit women's access to the planned interventions. As much as possible, the culture programme should aim to set up linkages between women cultural products and services producers/providers with support services and markets to improve access to skills and financial services. Once formulated, the programme should investigate constraints affecting women participation in the sector.

The project should purpose to support the Women groups such as Sisterhood group (Nairobi), Women artefacts traders of Wajir and Mandera and Stand - Female comedians (Nairobi) who are engaged in business with huge growth potential to expand their business and skills and motivate more women to join the sector.

### 3.7.2 Key Risks

The culture and creative sector is not prioritized in government funding and shows a thin presence in the region. The sector is left to the market dynamics to regulate and finance itself. There are few donors in the sector and the market players heavily depend on them. The sector is commercially viable but capital intensive at the onset (i.e. infrastructure such as performance venues and museums).

Some of the key risks identified for the culture sector as per the OECD "Copenhagen Circles" model are either contextual (Security, Covid – 19 related gathering restrictions) or institutional (weak culture ministries or departments, legislation/regulations), or programmatic (political and religious leaders interference, insufficient demand, and sustainability/commercial viability). At a later stage, when designing next-generation culture programming, detailed risk analysis and prioritization by intensity (probability x impact) should be done.

<sup>2</sup><https://borgenproject.org/womens-rights-in-somalia/>

<sup>3</sup>UNDP Somalia: Gender in Somalia

<sup>4</sup>United Nations Development Programme (2012). Somalia Human Development Report 2012: Empowering Youth for Peace and Development, p. 54.

<sup>5</sup>UN Security Council (2020). August 2020 Situation in Somalia <https://www.undocs.org/en/S/2020/798>

<sup>6</sup>55 <http://www.so.undp.org/index.php/Millennium-Development-Goals.html>

## 4 Sustainability Analysis (Who Does, Who Pays?)

### The Vision of the Future Market

A strong and vibrant cultural market in the future will feature public and private sectors acting in coordination to progress towards a sustainable economy driven by local consumers. A well-regulated private sector will invest in sustainable cultural enterprises creating employment for the local artists with limited dependence on external support from donors.

Current market situation detailing who does? who pays? and the existing challenges are provided below

Table 4-1 Current Market

Value Chain Step (Core)	Who Does?	Who Pays?	The Problem: Inadequate, mismatch, absent?
Culture and creative sector products and Services			
Performing Arts	Individual artists, Band groups, Theatre groups	-Attending audiences pay cash -Government agencies Private companies Donors	- Funds flow not regular – occasional one-off events - Donors supported activity may not be a local priority -Steady-state fund is absent - Private companies primary aim is an advertisement of their own brand than promoting cultural sector growth.
Visual arts and crafts	Craftsmen/Women Photographers Videographers Painters	Individual Target audiences pay cash (weddings, Offices, tourists, Nomads, Farmers) -Gift shops -Online subscription services -Advertising companies	-Somali community interest in artefacts low -Indigenous knowledge skills -Clients offer less for local products -Fragmentation – poor networking and missed opportunities
Media Content development	Social Vloggers,	-Online subscription services -Advertising companies	Low skills and awareness of opportunities that exist. Regulation
Literary Arts	Publisher, Individual authors, Libraries	Schools and Universities, School going children,	Limited books in local languages Low reading culture

while the future market analysis is provided below

Value Chain Step (Core)	Who Does?	Who Pays?	Challenges envisioned
Culture and creative sector products and Services			
Performing Arts	Private Studios Brand Managers – networking and promotion of artists -Mentors	-Attending audiences pay cash - Private companies - one-off Donor support for events	- Legal support for contractual services - Regulation of content and licensing
Visual arts and crafts	- TVETs -Skilled Craftsmen/Women -Craft Associations and enterprises	Individual Target audiences pay cash ( -Gift shops -Large retail outlets -Online shops/stores	-Quality assurance of products - Skills gaps -Regional collaboration across the regions
Media Content development	Social Vloggers,	-Online subscription services -Advertising companies	Regulation Quality control
Literary Arts	Publisher, Individual authors, Libraries	Schools and Universities, School going children,	Limited books in local languages Low reading culture

## 4.1 Implications

The “Who Does, Who Pays?” analysis provides a framework for what needs to be done to move the culture sector to a sustainable future eventually. With sustainability as the goal, SDC can provide technical support in the short and medium-term along the path to realizing the goal:

- > Notably, the culture sector across Somalia, Somaliland and NE Kenya are not prioritized and grossly underfunded. To meet the long-term sustainable vision, the sector requires both technical handholding and financial investment to create local markets for its products and services and attract both government and private sector support where possible, especially in NE Kenya.
- > The Somali culture sector actors' capacity to diversify and improve the quality of their products and services must be strengthened, so the domestic can sustain profitable cultural enterprises.
- > Culture products and services delivery systems and their supply chains must be strengthened to meet the needs of the population. This shall be done in coordination and cooperation of public and private sectors, as well as the donors and NGOs.
- > As public sector funding and prioritization is currently lacking, the private sector must play a dominant role in developing the sector.
- > Simultaneously, the regulatory environment must be developed with the full input of the sector actors.

- > These long-run changes will be implemented through a series of small, consistent, coordinated steps and cannot be done all at once.

From our analysis, targeted, incremental investment in culture programming by SDC will contribute to the sustainable growth of the Somali culture market. There exists an early mover advantage to excite the market and better coordinate at low cost as the market is not heavily distorted by the donors.

## 5 Constraints Analysis

The Somali cultural market is on an upward trend but is affected by many constraints. Based on the information from the assessment (KIs, observation, and literature reviews), the team analysed and identified the constraints most relevant to a properly functioning Somali culture sector. The team prioritized the various constraints to what is actionable and realistic within the SDC resource base.

We viewed the constraints through the lens of MSD with heavy consideration of the culture sector actors' perspectives. The purpose of this constraints analysis is to discover where the programme might potentially have the highest sustainable impact. Only constraints that are considered strategic (i.e. the programme will not meet its objectives if they are not addressed) are included in this analysis.

The constraints could relate to a specific category of the cultural products and services or could overlap, and these will be pointed out in the text wherever possible. The priority constraints are summarized below for ease of use. A more comprehensive list of constraints is included in the annexes of this report

### 5.1 General constraints on CCI in order of intensity in affecting the market

#### Issue of Capacity Building and Training

- > The artists, though talented in their specific fields, have limited entrepreneurship capacity and experience with business models. An opportunity to address this constraint would be to pilot and test innovative business models with selected categories that have shown high market potential and scale the successes across the three regions.
- > The actors in the culture sector that includes women, youth, vulnerable and minority groups have a range of talents but lack supportive associated skills that could reduce their dependency on external actors, which increases their production cost and reduces their competitiveness.
- > The sector has high start-up costs: this involves sourcing of equipment – camera, video editing equipment, raw material for handicrafts etc. Other costs may include hosting of events and branding. Private banks like Dahabshil in Hargeisa are considering providing microloans services for specific art sectors based on their social impact policy and guidelines. The practical financing approach for Nairobi and NE Kenya is a mix of events sponsorship and Interest-free loans managed by the project implementing institutions. The modalities would be consultatively defined at the project start phase.
- > Mentorship and brand marketing constraints are unique to performing artists. Linkages and funding by the established corporations are practical sources especially through mentorship and brand advertisement by local and international brand managers. The young artists lack the connections and funds to secure such deals.
- > The Somali cultural market demands rich patriotic and family content. The current artists are viewed as lacking quality in content and style. These could also be due to language barrier, lack of imagination, limited mentorship and limited financial ability to research to develop rich content.

### **Issue of Networking, Collaboration, and Partnership**

- > The cultural and creative sector is highly fragmented, with many local groups acting independently, and in isolation, often without the knowledge of each other. This is a function of weak networks, institutions, and physical infrastructure to support artists and creatives. Government action to support the culture sector in the HoA is weak. And, while social media certainly plays a role in promoting and connecting cultural actors, there is not the same sense of a cultural community or 'sector' as might be found in other countries where there exists a comparatively greater range of physical locations for cultural actors to congregate (galleries, schools, museums, public meeting spaces, etc.), and a greater number of institutions to support cultural actors (funding bodies, artists' collectives, arts councils etc.).

### **Issue of regulation, policy, and community norms**

- > The governments in Somalia/Somaliland and County administrations in NE Kenya are yet to enact legislation, regulations and policies that create enabling environment for the culture Market to thrive.
- > Community norms and attitudes towards art products, services and artists is challenging for young artists to join the sector

## 6 Proposed Intervention Opportunities

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### 6.1 Intervention areas of highest potential

Based on the analysis and prioritization of the constraints across the three regions, the team found areas of high investment potential. These high investment potential areas have yet to be strictly prioritised since under an MSD approach the market will test and scale the most viable opportunities. Overall, the assessment found vast areas that can be addressed through the private sector using the MSD approach in the culture and creative sector.

### 6.2 Family Entertainment

Watching television, kids show, cartoons and movies as a family is a pastime that spans generations, invites meaningful conversations and creates lasting memories. Somali families, like others, are always looking for contextually acceptable family shows and programming.

Currently, there is a huge gap in family entertainment. The Satellite-based Somali TV stations beam foreign entertainment with Somali language voice-over or subtitles for lack of quality local content. There is a huge market potential for family content ranging from television and radio stations, local electronics studios and shops and online viewing through YouTube.

Local entities and groups buoyed by their talents and business potential are therefore needed to step in and take leadership in the development of this sub-sector. SDC'sculture programme should look to work with local stakeholders to produce a pioneer family entertainment business solution that is expected to be profitable from the onset due to huge local demand. The brand name and logos shall be developed and popularized as the mark of quality and socially acceptable family entertainment.

### 6.3 Stand-Up Comedy

The comedy and laugh industry sub-sector continue to grow rapidly. Young Somali female and male stand-up comedians have emerged providing basic comedy and hosting cultural events. These young budding artists are yet to package their talent to be commercially workable.

The young comedians run individual ventures with limited skills and financial capital to grow the business to a workable scale. Despite their limited operations, they command a substantial following on YouTube and social media.

SDC'sculture programmes should look to work with these artists to host cultural events across the regions to grow their profile, attract an audience, and create a market for their products and services. Such cultural events provide perfect venues for promoting other cultural products developed by other stakeholders like family entertainments, artefacts, and avenues for promoting literary arts.



## 6.4 Women Handcraft Association

Supporting and organizing women's handcraft enterprises and associations will encourage skilled women to enter craft businesses and many community members can receive help from the value chain of this market. Enterprises that sell artefacts in the cities need more supplies and products from local people.

Currently, there is a huge gap in the production of crafts—but the market need for locally produced crafts for the city market, rural pastoralists, tourists, and diaspora is available. According to the Asli mills, craft enterprises in Hargeisa, craft shops, souvenir shops and local people need to be organized in associations who produce crafts continuously. Somali diaspora, local people and tourists have also expressed interest in local crafts. Therefore the craft sector needs capacity building, training and support for space and access to finance. The potential of craft for market and sustainability is promising. Crafts can be also marketable in regional states where Somali people live. This will also boost the shared values of the Somali community in the region.

In Kenya, Sisterhood group, a social - enterprise of 100 Somali Women Refugees in Nairobi have been engaged in the Tie-Dye women clothing business since 2018, albeit on small scale. The clothes they sell are in high demand in the market and could generate a decent income. *"The group operate on a shoe-string budget but market growth exist in making bedsheets, masks and other women wear. The group require marketing skills training, technical support, and production space."* Holly Ritchie, Nairobi

The Wajir and Mandera women traders engaged in traditional Somali hut building material have been in business for over 20 years and opportunities for expansion exist through an upgrade of the business model. The Tumaal (Metalsmith) of Reer – Bahaar minority group in Wajir and their counterparts in Mandera produce Knives and Farming tools through laborious traditional methods that require modernization to increase output and quality.

## 6.5 Talented Youth on Dance, Music and Poetry

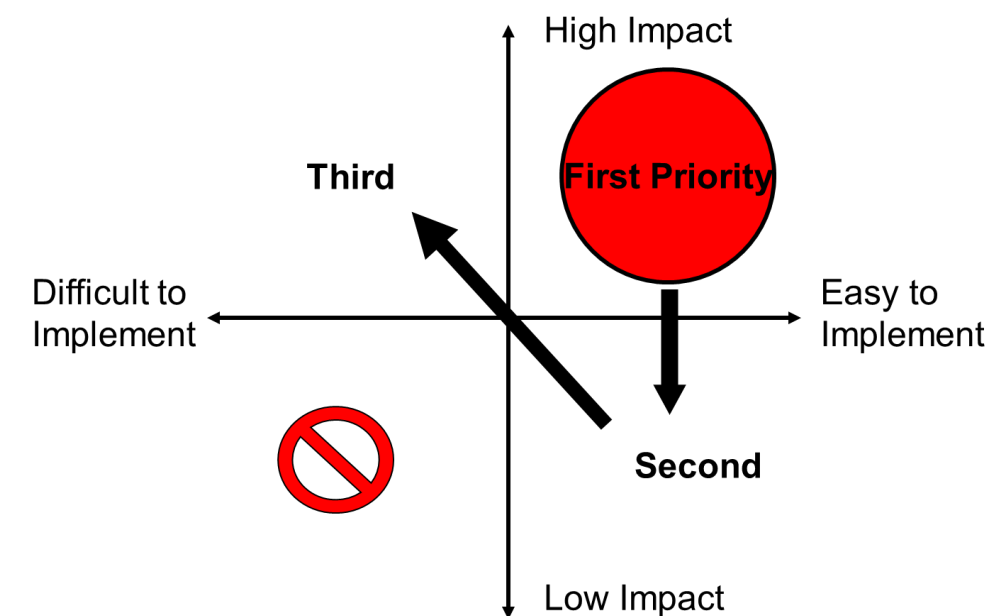
Supporting and organizing youth groups on dance, music, comedy, and poetry has good potential to serve the market for different occasions and events.

Young women can be organized to perform music, dance and poetry for different national events, book fairs, government grand workshops, weddings, and family cultural ceremonies. According to one entrepreneur and musician who owns a music and culture centre in Hargeisa, Somali people occasionally need their cultural performance live on various occasions like public holidays, weddings, book fairs and weekends at Hidodhowr centre. Therefore there is an opportunity for youth in dance, music, and oral poetry for these occasions. The musicians need support to set up a training centre for the sector. The training centre could be owned by an established culture sector leader to provide common platforms for artists to perform at a modest fee to sustain the business

### Priority Categories:

Using the Impact-Effort Matrix below the assessment has identified interventions that SDC can implement based on how easy/difficult they are to implement and their level of impact. The high impact- easy to implement tasks will generate quick wins for the programme but sometimes due to the layers of activities required, they may take a longer period similar to high impact- difficult to implement.

Figure 6-1 Impact Effort Matrix



A summary of the interventions and the estimated level of interventions, implementation timeline is provided in Table 6-1.

### Key

- 1: HE - High impact, Easy to implement
- 2: LE – Low impact, Easy to implement
- 3: HD – High impact, Difficult to implement
- 4: LD – Low impact, Difficult to implement (Eliminate, waste of time and money)

**Table 6-1 SDC Culture Market Assessment: Estimated annual investment for Potential intervention**

Potential intervention area	Priority	Investment range(Estimate)	Phases			Year of Implementation/Time frame
			1st	2nd	3rd	
-Build networks like art forum, cultural investment forum and women handicraft forum through available art associations	1: HE	\$100K-\$250K per annum	6 months	1 year	2-8 years	3 -10 years
-Strengthen the value chain for handicrafts, stand up comedy, dance and music, family entertainment and oral poetry by raising the awareness of the community of the available culture products and service and their importance, formalize production and sale of the above Somali cultural products and services), support existing art marketing and training centres.	1: HE	\$100K-\$250K per annum	1 year	1 year	8 years	10 year

-Capacity building and training on art skills, marketing and sales (Painting, poetry, crafts, music, dance, video production, literary art)	1:LE	\$50K - \$100K per annum	1 year	1 year	1year	3 year
-Design products and services specifically for the market such as family entertainment content; Stand-up comedy	2:LE	<\$50K-\$100K per annum	1 year	1year	1 year	3 year
-Promote the shared values of Somali people living in all three countries in Kenya, Somalia and Somaliland through creative art and culture.	2. LE	<\$50K per annum	1 year	1 year	1 year	3 years
-Transfer knowledge on low-cost models from similar cultural environments – e.g., Ethiopia, Sudan	2. LE	<\$50K per annum	1 year	1 year	1 year	3 -5 years
-Awareness creation on the values of art and culture (Organize public discussions and workshops), attitudinal change on the norms and behaviour towards local products and art facts, Conduct Buy local' campaign	3: HD	\$50K-\$70K per annum	1year	1 year	3-8 year	3 -10 years

in collaboration with CISP(Italian NGO)						
-Encourage and motivate artists through government and community structures	3: HD	\$100K-\$200K per annum	1year	1year	3-8year	3-10 years
-Support establishment of a handicraft training centre for women, youth and marginalized community with collaboration of Government and NGO	3: HD	\$100-\$200K	1year	1year	3-8year	3-10 years
-Support the government in designing policies and strategies on CCI	3. HD	\$50-\$70K per annum	1 year	1 year	3-8 year	3-10 years

## 6.6 Characteristic of the cultural Market

To inform targeted investment in the Somali cultural sector across the 3-region, the following considerations are crucial.

- a) Demographic profile of Actors - The entertainment sub-sector is dominated by youth, while the handcraft subsector has a mix of old and young entrepreneurs.

Stakeholders	Age bracket	Strengths	CCI Category
Somali Youth	20 – 35 years	Talented, Focused, Skilled, Business Oriented	-Stand-up Comedy -Entertainment – videos series, social media
Somali Women	20 -40 years	Committed, Hands-on business experience	Traditional handicraft
Minority communities - Mostly Men	20-50 years	Skilled, Committed, Hands-on business experience	Metalsmith
Men and women	<40	Talented and skilled	Comedy and laughter
Women and youth	<40	Passionate for art	Dance and Music
Community members skilled in Oral poetry	20-50	Passionate for poetry	Oral Poetry

- b) Cross investment - Geographical interventions (Kenya, Somalia, Somaliland). Investing in high potential interventions that could benefit from skills and contextual depth of the 3 geographical areas to increase sustainability.
- c) Phased Approach. SDC should consider investing in and building on the incremental growth of partners. The programme should fund/co-fund pieces of training, market research and connection to mentoring opportunities before rolling out products for the mass market. The programme should through the MSD approach conduct in-depth partner scoping, conceptualization and costing for potential intervention areas listed below.

## 6.7 Phased Approach

### 6.7.1 Phase 1: Designing Phase: 3 – 6 months

- Programme Design: In-depth assessment where each Intervention area is described; its business model defined and partners identified.
- Geo-preference of interventions agreed upon or cross geo interventions mapped with due regards to contextual similarities and differences.
- In-depth mapping of programme risks and mitigation measures defined,

### **6.7.2 Phase 2: Network formation, skills building and hardware and software acquisition through partnerships**

- Partners mobilized into the formation of service delivery networks
- Formalization of partnership through MOUs
- Specific partner/service delivery network concept note development, work planning and roll-out of activities
- Acquisition/provision of requisite hardware and software in cultural products and services development
- Skills building – formal pieces of training and establishment of common user platforms (studios etc)
- Skills building – mentoring, market linkages and research

### **6.7.3 Phase 3: Consolidation of Business market**

- The phased withdrawal of SDC support
- In the MSD approach, an Intervention could be terminated at any time if found unviable and other opportunities explored.
- Viable Interventions receive programme support and are appraised on an ongoing basis. Positive appraisal where the Intervention or partner skills and business is found sustainable SDC is briefed and support ended.

## **6.8 Conclusion**

The findings of the assesment have determined the entry points for sustainable and vibrant markets in the culture and creative industry for SDC's future culture program interventions. Through this assessment, some important evaluative questions were answered. The barriers to cultural industries market functioning, the contribution of CCI for economic growth and job creation, and the interconnection and structure of culture market subsystems.

In general, from our observation, the Somali community is proud of their identity and culture but they need support to commit, develop and promote the sector. This can build on the efforts of a few key individuals who are committed to advocacy, though many more are needed from all parts of the market system. The sector also needs structural changes. Institutions and infrastructure must be built for the arts sector. Content quality has to be improved and developed. Government negligence, exploitation, lack of training, lack of financial support, and lack of promotion assistance from stakeholders must be improved.

The study recommends that the Government through its relevant ministries, departments and agencies should come forth with support or policies that would create an environment for all stakeholders, including financial institutions, training institutions, and NGOs, to lend a helping hand in promoting skills development in the area as well as the promotion of creative art and handcraft businesses and products.

SDC has a first movers advantage and opportunity to support capacity building, institutional support, networking and strengthening the value chain. In this regard for its final implementation and intervention decisions, we recommend SDC conduct full MSD detail analysis for potential intervention areas.

## 7 Annexe

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### 7.1 Annexe 1: Comprehensive list of constraints

1. **Business Model issues:** The artists, though talented in their specific fields, have limited entrepreneurship capacity and experience with business models. This could be partly attributed to the absence of mentoring institutions owing to limited exposure to the established culture business market. An opportunity to address this constraint would be to pilot and test innovative business models with selected categories that have shown high market potential and scale the successes across the three regions
2. **Skills limitations:** The actors in the culture sector includes women youth, vulnerable and minority groups who may talents, but lack associated skills that could reduce their dependency on external actors thus increasing their production cost-reducing their competitiveness.
3. **High start-up cost:** this involves sourcing of equipment – camera, video editing equipment, raw material for handicrafts etc. Other costs may include hosting of events and branding.
4. **Mentorship and Brand marketing:** These constraints are unique to performing artists. Linkages and funding by the established corporation could only be sources through mentorship and brand advertisement by local and international brand managers. The young artists lack the connections and funds to secure such deals.
5. **Content quality and low creativity:** The Somali cultural market demands rich patriotic and family content. The current artists are viewed as lacking in content and style. These could also be due to language barrier, lack of imagination, limited mentorship and limited financial capacity to research to develop rich content.
6. **The prohibitive cost of solo ventures:** Investment in quality content is capital intensive for individual or small groups of artists. This presents an opportunity for the program to leverage its horn of Africa experience and connection with an established market like Kenya to build low-cost ventures for these artists to adopt and drive sustainability in the market.
7. **Somali Consumer behaviour (local and diaspora):** Expenditure on the cultural products and services are low given the prevalent poverty level in NE Kenya, Somalia, and Somaliland; however, there exists a demand for quality family-oriented content among the middle class and the diaspora segment sufficient to drive specific culture products and services. While a culture program cannot directly influence the amount of disposable income that Somali families have, the program can work to better organize existing financial resources and supply better value-for-money cultural products and services through the private sector by better understanding consumer spending behaviour.
8. **Market distortion (especially in Somalia/Somaliland):** The first funding from aid agencies to revive the cultural institutions, and drive the development of the products and services may lead to a continued dependency on external aid funding and drive the sector out of government priorities. This market distortion, created by aid dependency and no domestic revenue allocation, has affected the sustainability of the



cultural market. In Somalia/Somaliland there is poor coordination among the culture sector actors. Coordination mechanisms can be put in place to ensure donor-funded programs prevent further market distortion by using Somalia's private sector and focusing on the attainment of sustainability in cultural products and services delivery that can meet the needs of Somalia's mass market.

9. **Unmet opportunities for network-building and technical skills transfer:** Devolved system of governance in Kenya makes it easier to implement innovative ideas in Culture and Heritage at the local level. Similarly, the program could leverage the volunteerism spirit in Somalia – Is Xilqaan, and the adaptability of the Somali artist to introduce new concepts in culture products and services provision.
10. **Fragmentation:** The SDC culture market evaluation report that the “cultural sector is highly fragmented, with many local groups acting independently, and in isolation, often without the knowledge of each other”. This is a function of weak institutional and physical infrastructure to support artists and creatives. Government action to support the culture sector in the RPHoA is weak. And, while social media certainly plays a role in promoting and connecting cultural actors, there is not the same sense of a cultural community or ‘sector’ as might be found in other countries where there exists a comparatively greater range of physical locations for cultural actors to congregate (galleries, schools, museums, public meeting spaces, etc.), and a greater number of institutions to support cultural actors (funding bodies, artists’ collectives, arts councils etc.).
11. **Absence of Regulation:** The governments in Somalia/Somaliland and County administrations in NE Kenya are yet to enact legislation, regulations and policies that create enabling environment for the culture Market to thrive.

Despite the above constraints, the cultural

## 7.2 Annexe 2: Potential Intervention Areas Against Constraints Addressed

Constraint	Areas of Potential Intervention that Address This Constraint
List of Constraints	
Business model issues	<ul style="list-style-type: none"> <li>▪ Design products and services specifically for the market such as family entertainment content</li> <li>▪ Transfer knowledge on low-cost models from the similar cultural environment – Ethiopia, Sudan</li> <li>▪ Help Culture products and services providers with economic analysis to understand costing and pricing acceptable to the market.</li> </ul>
Skills limitation	<ul style="list-style-type: none"> <li>▪ Facilitate training at local TVETs for Blacksmiths</li> <li>▪ Introduce targeted pieces of training for Video editing, shooting</li> </ul>
High Start-up costs	<ul style="list-style-type: none"> <li>▪ Provision of capital-intensive equipment and hardware's</li> <li>▪ Joint investment or collaboration between artists</li> <li>▪ Formation and Injection of seed money at sector Saving cooperatives</li> </ul>

Constraint	Areas of Potential Intervention that Address This Constraint
Mentorship and Brand Marketing	<ul style="list-style-type: none"> <li>▪ Provision of Technical support through pairing with established Somali or non-Somali artists in the region</li> <li>▪ Branding of individual artists, products or company/firm and exposure through the media</li> <li>▪ Exposure visits to similar cultural contacts – exchange visits across the region</li> <li>▪ Linkages to individual artists to Marketing Managers</li> </ul>
Content Quality and Low creativity	<ul style="list-style-type: none"> <li>▪ Training script writing</li> <li>▪ Support in gathering market insights into the socially acceptable contents</li> <li>▪ Production of highly sought-after family contents (entertainments) and kids' series</li> </ul>
High cost of solo investments	<ul style="list-style-type: none"> <li>▪ Collaborate with sector players on joint ventures and synergies</li> <li>▪ Provide common user services like studios or script editing to pool cost</li> <li>▪ One-off equipment and other hardware provision</li> <li>▪ Financing of at least 3 start-up shows to build brand and following</li> <li>▪ Technical support in branding and marketing</li> </ul>
Somali Consumer behaviour (local and diaspora)	<p>Raise the awareness of the community of the available culture products and service</p> <p>Formalize production and sale of Somali cultural products and services</p> <p>Map and identify linkages with local and regional products and services of interest to the consumers</p>
Market Distortion	<p>Facilitate roundtable for Culture sector actors and donors to address pertinent issues</p> <p>Work in cultural areas not covered by main donors</p>
Unmet opportunities for network-building and technical skills transfer	<p>Help existing Artists in each target region to build business networks</p> <p>Support establishment of professional associations and linkage to regional counterparts</p> <p>Map, identify and structure collaboration between culture sector actors to serve complementary functions</p>
Weak regulation	<p>Promote self-regulation within the sector actors, networks, and their supply chains</p> <p>Develop culture sector quality accreditation system (within/between networks)</p> <p>Use the project as leverage to donors, government, private associations to set standards</p> <p>Support accreditation and licensing by the government by setting minimum network entry requirements</p>

Source: Cardno analysis

### 7.3 Annex 3: List of key informant interviews

Location	Name of Key Informant(s)	Function	Organisation	Sector
Nairobi	Steve Turner	Director	Bar Kulan Trust	Media Production
Nairobi	Holly Ritchie	Director	Thrive Somali Women Refugees Project Sisterhood group (Nairobi)	Women, refugees' self-help, handicrafts
Nairobi	Nasra Yussuf	Comedian	Independent artist,	Stand-up comedy
Nairobi	Maryam Noor Yussuf (Maria Captain)	Artist - Drawings	Independent artist,	Handicrafts & general
Garissa	Mohamed Osman	Manager	Garissa mediation council	Youth culture
Mandera	Hassan Cameroon	Media, Video, events	Cameroon Media	Events, Social Media sites, Family content
Mandera	Ibrahim Mohamed Ali	Activist	Mandera Got Talent & educator	TV stand-up comedy
Wajir	Farah Sirat Farah	Curator	Wajir museum	Cultural heritage & handicrafts
Wajir	Mama Hodhan	business lady	Women group	Traditional Handi craft
Mogadishu	Mohamed 'Diini' Ahmed	Founder/Dir	New Horizon / Mog Book Fair	Books
Mogadishu	Abdulkadir Ato Mohamed	Programme Manager	CISP Mogadishu	Media Production, visual arts, theatre
Hargeisa	Mohd Jibriil	CSR manager	Dahabshiil Bank	Corporate Social Responsibility/funding
Hargeisa	Jama Muse Jama	Director	Hargeisa Cultural Center	Books, general
Hargeisa	Khadija Mohamed	Marketing Mang.	Hill Press	Literary Art (Publishing)
Hargeisa	Mohamed Jibril	Director	Dahabshil Bank	Financial Institution
Hargeisa	Yaliye Ahmed	Manager	Asli Mills	Handicrafts
Hargeisa	Abdirahaman Abidella	Owner	Hiddo academy	Folk Dancing
Hargeisa	Zahara Hedegal	Owner	Hiddo Dhowr	Culture, Food Music
Hargeisa	Mustafa Ahemed	Administrator	Hargeisa cultural centre	Cultural centre
Hargeisa	Ahmed Abdi Ahemed	Staff	Somaliland Media production	Video production
Hargeisa	Sahra Hussien	Owner	Individual craft woman	Traditional Handi craft

## 7.4 Annex 4: Interview Guide – Culture Products and Service Providers

Interviewee Market Position;	
Institution;	Location;
Interviewee name;	Position /Designation;
Interview Date;	Interviewed by;

**Interviewer Introduction**

“Hello, my name is \_\_\_\_\_. I am visiting you on behalf of Cardno, for the Assessment of the Culture Market for Somalia, Somaliland & Northeastern sponsored by Swiss Development Cooperation. We are conducting a culture creative industry assessment on the barriers that local culture stakeholders face in improving their business model to make it more sustainable, as well as help identify barriers to economic growth and opportunities for job creation for women and youth in this sector.

I will ask you specific questions about your culture products and services, how your clients pay, how you as a provider is paid, and the support you have or know of, if any, that can cater to this group of stakeholders.

We shall discuss each item at a time. All your answers will be kept confidential. The results of all of the interviews will be analyzed together and used to better understand what is working well now and what may need to be changed.”

May I have your consent to go ahead with the interview?

Optional - May I have your consent to use your name in conjunction with specific responses?

1. What Culture Products and services do you offer? How do you decide what to provide? and what is the cost of delivering products and Services? Probe
  - What are the opportunities to expand your products and services to meet the needs of the market?
  - Which needs are well-met, and which are underserved or unserved?
  - What are your growth areas?
  - What are the problem areas?
2. Which products and services are profitable for you and which ones are not?
3. Who do you provide these products and services to? What is your customer profile (probe)?
4. How do your customers pay for your services? (Multiple answers acceptable – if multiple answers, probe proportion of each)
  - Out-of-pocket (cash or mobile money).
  - Through existing government (both Central and local), donor, or NGO programs – ask which and how – if so, are there opportunities for partnership with these programs?
  - Other
  - Do you have customers who cannot pay? How do you deal with them?
5. From your perspective, what are the challenges for your customers in buying your products and services and how can these be addressed? Is there a way our project can help ease access without directly providing money?

6. Do you belong to a culture products and services provider network? If not, would you be interested in joining a provider network?
7. How do you describe your business relationship with other culture market players (Individual artist, women, or youth associations etc.)? (Local or foreign)?
8. Do you have expansion plans? What and or where?
9. What are the biggest challenges of running a culture products and services business in Somaliland?
10. What is your relationship with government regulatory authorities?
11. In your opinion, what non – financial support needs to be provided over the next three years to improve the Culture market system in Somaliland?
12. Is there anything else we have not mentioned that you think is important in influencing the culture market in Somaliland?

**End of Interview**

**Thank you for your time**

## 7.5 Annex 5: Selected photos from Wajir



Wajir market





Wajir National Museum



## 7.6 Annex 6: Selected photos and video from Hargeisa



Hido Academy in  
Hargeisa.mp4











## About Cardno

Cardno is an ASX-200 professional infrastructure and environmental services company, with expertise in the development and improvement of physical and social infrastructure for communities around the world. Cardno's team includes leading professionals who plan, design, manage, and deliver sustainable projects and community programs. Cardno is an international company listed on the Australian Securities Exchange [ASX:CDD].

## Cardno Zero Harm

**Cardno**  
**ZERO**  
**HARM**  
EVERY JOB. EVERY DAY.

At Cardno, our primary concern is to develop and maintain safe and healthy conditions for anyone involved at our project worksites. We require full compliance with our Health and Safety Policy Manual and established work procedures and expect the same protocol from our subcontractors. We are committed to achieving our Zero Harm goal by continually improving our safety systems, education, and vigilance at the workplace and in the field. Safety is a Cardno core value and through strong leadership and active employee participation, we seek to implement and reinforce these leading actions on every job, every day.