



ISSUE BRIEF

Getting Creative About Development

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By 2035, sub-Saharan Africa will have more working-age people than the rest of the world combined. African governments collectively need to create eighteen million new jobs each year to absorb the large, young, and ambitious population coming to working age.¹ But technological advances, combined with the underdeveloped infrastructure of most African nations, mean that the tried and true model of export-oriented industrialization, which allowed the East and Southeast Asian economies to develop very rapidly, is unlikely to produce adequate job creation in the vast majority of African markets. In fact, manufacturing as a share of total economic activity in Africa has stagnated at about 10 percent,² and—though there are notable exceptions, such as Ethiopia—the continent as a whole is deindustrializing.³ Agriculture still continues to serve as the backbone of most African economies, with over 70 percent of Africans earning a living in that sector.⁴

But as Africa urbanizes, the composition of economic activity is rapidly changing, shifting away from agriculture and towards the services sector. In 2015, services accounted for 58 percent of sub-Saharan GDP (up from 47 percent in 2005).⁵ More significantly, 33 percent of African

The Africa Center promotes dynamic geopolitical partnerships with African states and shapes US and European policy priorities to strengthen security and promote economic growth and prosperity on the continent.

- 1 Céline Allard et al., Regional Economic Outlook: sub-Saharan Africa 2015, International Monetary Fund, April 2015, https://www.imf.org/-/media/Websites/IMF/imported-flagship-issues/external/pubs/ft/reo/2015/afr/eng/pdf/_sreo0415pdf.ashx.
- 2 Brahim Sangafowa Coulibaly, "Africa's Alternative Path to Development," The Brookings Institution, May 3, 2018, <https://www.brookings.edu/opinions/africas-alternative-path-to-development/>.
- 3 "More a Marathon than a Sprint," The Economist, November 7, 2015, <https://www.economist.com/middle-east-and-africa/2015/11/07/more-a-marathon-than-a-sprint>.
- 4 Africa has not experienced a green revolution similar to that of East Asia, where cereal yields nearly quadrupled between 1960 and 1990. Low productivity in African agriculture and labor continues to inhibit economic growth; Daudi Sumba et al., Africa Agriculture Status Report 2017: The Business of Smallholder Agriculture in sub-Saharan Africa, Alliance for a Green Revolution in Africa, August 28, 2017, <https://agra.org/wp-content/uploads/2017/09/Final-AASR-2017-Aug-28.pdf>; El-hadj M. Bah et al., The Africa Competitiveness Report 2017, World Bank Group, May 4, 2017, <http://documents.worldbank.org/curated/en/733321493793700840/pdf/114750252017154823ACRfinal.pdf>.
- 5 Art Chambers et al., The sub-Saharan African Services Economy: Insights and Trends, US International Trade Commission, July 12, 2017, https://www.usitc.gov/publications/332/sub-saharan_african_id-17-046_final_071217sae.pdf.

youth are now employed in services.⁶ The services sector is broad and dynamic, including everything from accounting firms to roadside barbers. And an often-overlooked source of growth in the sector, especially in Africa's larger and more developed markets such as Nigeria, South Africa, Kenya, and Morocco, are the creative and cultural industries (CCI). African film, music, and fashion are exploding in popularity on the global stage and should be seen as a force for economic good.

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From Nigeria's Nollywood film industry to the visual arts in South Africa, CCI are creating a new realm of opportunity. Africa's cultural goods sector⁷ is estimated to employ about half a million people and generate \$4.2 billion in revenue on the continent, albeit mostly through the informal economy.⁸ However, if CCI could become more formalized and thus capitalized, CCI could become a driving force in economic development. African governments, foreign aid agencies and multilateral institutions should consider elevating CCI within their development strategies. This brief takes a market-oriented view of African music, fashion, film, and visual arts and addresses the commercialization of the arts for employment and profit. In this way, indigenously-created African products will be discussed in the same context as foreign cultural products that touch African markets through the production process. The brief treats cultural goods as products that can be consumed locally and exported internationally,

and the central argument of this brief is that African countries should strive for a larger share of the global entertainment market.

With these undergirding assumptions, this brief will provide a snapshot of the creative and cultural industries in key African markets; discuss the trends undergirding the growth of CCI; outline the challenges facing the industry; and offer policy recommendations. While the creative and cultural sector will not supplant agriculture, manufacturing, or services in job creation efforts, CCI has a significant role to play in African economic development and has far too long been ignored due to its untraditional nature.

Snapshot of the Creative and Cultural Industries in Africa

Africa's rich cultural assets have influenced global culture since the horrors of slavery carried African traditions to the Americas and Europe. Though slaves and their descendants enriched their new countries and communities, creating entirely new categories of music and art, they were rarely permitted to receive commercial returns on their cultural contributions. And cultural exports from Africa continued to be undervalued, and appropriated by non-African artists, well into the post-colonial era. The same type of racial discrimination that prevented black American artists from sharing in the profits of their creative pursuits historically disadvantaged Africans in their efforts to monetize their talents. Superstar Nigerian musician Fela Kuti has never gained proper recognition from Western record companies despite selling millions of copies of his sixty records. Fela commented, “American record companies seem to feel I am antiwestern, anticapitalism, anti the kind of society they like.”⁹ As a result of this type of exclusion, the creative and cultural industries in African markets today lack the formality and professionalism of their global counterparts. However, globalization is rapidly changing this reality, and presenting African

6 El-hadj M. Bah et al., The Africa Competitiveness Report 2017, World Bank Group, May 4, 2017, <http://documents.worldbank.org/curated/en/733321493793700840/pdf/114750-2-5-2017-15-48-23-ACRfinal.pdf>.

7 Based on EY's definition of the underground economy, which involves the exchange of cultural goods hidden from official view. See: Marc Lhermitte et al., Cultural Times: The First Global Map of Cultural and Creative Industries, EY, December 2015, [http://www.ey.com/Publication/vwLUAssets/ey-cultural-times-2015/\\$FILE/ey-cultural-times-2015.pdf](http://www.ey.com/Publication/vwLUAssets/ey-cultural-times-2015/$FILE/ey-cultural-times-2015.pdf).

8 Marc Lhermitte et al., Cultural Times: The First Global Map of Cultural and Creative Industries, EY, December 2015, [http://www.ey.com/Publication/vwLUAssets/ey-cultural-times-2015/\\$FILE/ey-cultural-times-2015.pdf](http://www.ey.com/Publication/vwLUAssets/ey-cultural-times-2015/$FILE/ey-cultural-times-2015.pdf).

9 Richard Harrington, “Fela Kuti &,” Washington Post, November 7, 1986, https://www.washingtonpost.com/archive/lifestyle/1986/11/07/fela-kuti-38/69e5f304-aa23-44ce-a3c2-c9d3e3c119ee/?utm_term=.4d142b945bfl.

Art and Politics

Politics definitely influence the success of the creative industries. Nigeria and South Africa have not always been the market leaders in CCI in Africa. In West Africa, independence movements and democratization efforts led to many new governments embarking on programs to rejuvenate their traditional arts after decades of colonialism. In the 1940s and 1950s, Kinshasa, the capital of the Democratic Republic of the Congo (DRC), became the heart of Africa's recording industry thanks to the widely popular *soukous* music. Mobutu Sese Seko, the military dictator and President of the DRC from 1965 to 1997, understood the importance of *soukous* to the Congolese and used the music to promote his policies. However, by the mid-1970s, the decline of the DRC's economy and Mobutu's nationalization of the industry led Kinshasa's studios to relocate to Europe, often to Paris or Brussels. *Soukous'* new home became Europe and the African diaspora spread the sound far beyond its original home.

As *soukous* migrated to Europe, West African bands influenced by the Congolese sound gained popularity at home and abroad. Guinea's Bembeya Jazz National and Mali's Super Rail Band sold out venues in west Africa in the 1970s and their music was further popularized by the African diaspora. Famous Malian musicians still operate out of Europe for political reasons. In 2012, after Islamist extremists seized control and imposed their rule in northern Mali, many Malian musicians faced exile and continue to face challenges in reconstructing Mali's vibrant music scene. While Francophone African countries dominated the music industry after the wave of colonization, today Anglophone African countries are shaping and transforming the industry.

countries the opportunity to harvest greater returns from the international entertainment market.

Today, CCI plays an integral role in the global economy, generating \$2.25 trillion in revenue and employing 29.5 million people. Africa accounts for less than 3 percent of the total revenue, and 8 percent of the total CCI jobs, leaving room for tremendous growth.¹⁰

Demand for African cultural goods has increased both within the continent and internationally. There is a global appetite for representations of African cultures—even fictitious ones. The Hollywood blockbuster *Black Panther*, which showcased African actors, music, and design influence, is now the highest grossing superhero film of all time, bringing in over \$1.2 billion at the box office globally. American celebrities and first ladies wear African fashion and Nigerian music pulses on the airwaves. Nollywood, Nigeria's film industry, accounts for 2 percent of Nigerian GDP and directly employs 300,000 people.¹¹ Indirectly, Nollywood is estimated to employ over one million people from actors to directors, hair stylists to sound technicians, marketers to advertisers.¹² In South Africa, creative industries

contribute about 2.9 percent to GDP and account for 3.6 percent of employment.¹³

While most CCI is consumed locally in African markets, transatlantic musical collaborations are growing and there is deepening integration between US record labels and African (mainly Nigerian) artists. Nigerian singer-songwriter Tiwa Savage's collaboration with the American R & B singer, Fantasia Barrino, led to a Grammy nomination in 2010, and WizKid's feature on Drake's song, "One Dance," led to a multi-album worldwide deal with RCA Records/Sony Music International. African music is now accessible on international services such as iTunes, Shazam, and YouTube, and Spotify opened offices in South Africa in early 2018. Africa's creative and cultural industries are unmistakably on the rise—especially in the US and European markets, which will make them more and more attractive to investors. This matters, because additional capital is needed to commercialize and distribute these products to the global market, and to maximize the sector's profit and employment potential for African economies.

10 Lhermitte et al., "Cultural Times."

11 Ibid.

12 Eric Oh, Nigeria's Film Industry: Nollywood Looks to Expand Globally, US International Trade Commission, October 2014, https://www.usitc.gov/publications/332/erick_oh_nigerias_film_industry.pdf.

13 Revised White Paper on Arts, Culture, and Heritage, Department of Arts and Culture of the Republic of South Africa, February 2017, http://www.dac.gov.za/sites/default/files/Legislations%20Files/Revised%203rd%20Draft%20RWP%20on%20ACH%20FEBRUARY%202017_0.pdf.

CCI By Sub-sector

The United Nations Educational, Scientific, and Cultural Organization (UNESCO) defines CCI as activities “whose principal purpose is production or reproduction, promotion, distribution or commercialization of goods, services and activities of a cultural, artistic or heritage-related nature.” CCI has eleven sub-sectors: television, visual arts, newspapers and magazines, advertising, architecture, books, performing arts, gaming, movies, music, and radio. This brief covers only the film, music, and, fashion industries given their size, relative maturity, measurability, and potential for future growth.

Film Industry

Nollywood is the central hub of Africa’s film industry and is the second-largest film industry in the world by

volume. Due to working capital constraints and the largely informal nature of Nollywood, film production is rapid, averaging about forty movies per week—a volume that falls short of only India’s Bollywood industry. Over the last three decades, Nollywood has been largely ignored by the rest of the world, but has built a large and dependable audience of Nigerians.¹⁴ Today, that domestic market is expanding outside Nigeria and the Nigerian diaspora, and filling the continent-wide demand for programming that is made by Africans about Africans. Most titles are recorded in English and usually sell over 200,000 copies, allowing them to turn a profit within two to three weeks of release.¹⁵ These profits are then recycled into the new round of production.

As the industry matures and production value improves, Nollywood films have garnered greater inter-



Behind the scenes of the Nollywood film *Jaja the Great*, starring Segun Arinze and directed by Nonso Emekaekwe. Photo credit: Chinedum55/Wikimedia Commons.

¹⁴ Jake Bright, “Meet ‘Nollywood’: The Second Largest Movie Industry in the World,” *Fortune*, June 24, 2015, <http://fortune.com/2015/06/24/nollywood-movie-industry/>.

¹⁵ Production costs range on average from \$25,000 to \$70,000; “Making a Fortune by Distributing Nigerian Films Online,” *BBC News*, May 7, 2012, <https://www.bbc.co.uk/news/world-africa-17896461>.

national recognition and commercial success, with some available to stream on platforms like Netflix. *The Wedding Party* premiered at the 2016 Toronto International Film Festival and quickly became the first Nigerian film to pass the \$1.3 million mark, only to be surpassed by its sequel *The Wedding Party 2* in 2017.¹⁶

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With the success of Nollywood and its growing role in the Nigerian economy (it contributes \$7.2 billion to GDP), the government has increasingly acknowledged the importance of the industry for economic development.¹⁷ Abuja has committed a budget of about \$8 million through Project ACT, which aims to improve and promote three key components of the movie-making value chain: capacity building, film production, and distribution.¹⁸ The government has also pledged tax relief aimed at fostering growth in the film industry.

Before the rise of Nollywood, Egypt was an internationally-recognized global powerhouse in film production. Prior to 2011, Egypt produced about forty films a year and has accounted for 75 percent of the films made in Arabic-speaking countries since 1980.¹⁹ Political and economic challenges have since adversely affected Egypt’s industry—production numbers plummeted after the events of the Arab Spring. However, the indus-

try is beginning to recover as younger filmmakers and older stars return to remake the industry in a new era.

The film industry is also growing rapidly in South Africa and Morocco, though not through original content production, as in Nollywood. Instead, these countries have become destinations for many of the world’s top filmmakers. Cheaper production costs, tax credits, and safe environments lead many to film in these alluring landscapes: from *Safe House* and *Eye in the Sky* in South Africa to *American Sniper* and *Sex and the City 2* in Morocco. Ahead of many of their peers, the infrastructure in Morocco and South Africa provides filmmakers with the necessary tools for high-end movie production. State of the art complexes such as Cape Town Film Studios’ \$35 million facility enhance South Africa’s competitiveness to attract production. Employing just four thousand people in 1995,²⁰ the South African industry created more than 21,000 jobs by 2017 and contributed about \$430 million to GDP.²¹

American, British, and French companies account for about 90 percent of foreign investment in the Moroccan film industry, which amounted to over \$130 million in 2014. Filming is largely clustered in Ouarzazate, and has created about three thousand Moroccan jobs.²² Companies in Morocco are providing cheaper alternatives for many of the roles required in movie production, including editing, which can offer attractively lower costs for international filmmakers. Morocco’s government has also supported the expansion of the film industry through a successful incentive structure, which includes a simplified import and export process for film shooting equipment, rebates from nationally owned transportation services (i.e. Royal Air Maroc), and VAT exemption on all good and services acquired in Morocco.

16 *The Wedding Planner* made N453 million at the box-office, far surpassing the previous Nollywood box office record of N178.5 million; Christopher Vourlias, “Wedding Party Fuels Record Nigerian Box Office Despite Ailing Economy,” *Variety*, February 3, 2017, <https://variety.com/2017/film/global/wedding-party-fuels-record-nigerian-box-office-despite-ailing-economy-1201977878/>.

17 Steve Omanufeme, “Runaway Success,” IMF, Finance and Development 53 (2016), accessed August 15, 2018, <http://www.imf.org/external/pubs/ft/fandd/2016/06/omanufeme.htm>.

18 “About Us,” Project ACT – Nollywood, accessed August 15, 2018, <http://www.projectactnollywood.com.ng/about/>.

19 Lhermitte et al., “Cultural Times.”

20 Andrew England, “Booming Film Industry Boosts South Africa’s Economy,” *Financial Times*, September 5, 2014, <https://www.ft.com/content/6cce315e-3420-11e4-b81c-00144feabdc0>.

21 Economic Impact of the South African Film Industry, Urban-Econ Development Economists, June 21, 2017, http://nfvf.co.za/home/22/files/2017%20files/Final%20NFVF%20Economic%20Impact%20Study%20Report_21_06_2017.pdf.

22 “Economie créative : panorama et potentiel,” Ministère de l’Economie et des Finances du Royaume du Maroc, April 2016, https://www.finances.gov.ma/Docs/depf/2016/economie_creative.pdf.



South African musician Moonchild Sanelly performs live at the Africa House at the SXSW festival in Austin, Texas. Photo credit: Adam Kealing

Music Industry

African music has long influenced music genres in the West. However, African-produced music gained little recognition outside of the continent until the era of independence. In the 1960s and seventies, Afrobeat, a combination of West African jazz, and funk styles pioneered by Fela Kuti, influenced a generation of American and British artists. But the appeal remained niche and diaspora-focused from the 1980s until around 2010. As streaming services spread throughout Africa with broadband penetration and mobile telephony, music made on the continent has gained global recognition from everyday listeners to music superstars like Drake and Nas.²³ Nigerian pop sensation Davido credits the internet and social media with sparking the transition of African music from the periphery to the mainstream in western markets.²⁴

Today Nigeria is the hub of music creation in Africa, producing over 550 albums annually. Over the last decade, “Naija” music has skyrocketed in popularity and today Nigerian live performance exceeds \$100 million in annual revenue.²⁵ Nigeria has a strong domestic digital music business and international players are taking a bigger interest. US and European record labels continue to sign Nigerian artists as they gain visibility through collaborations with Western artists. Los Angeles-based Universal Music Group recently acquired one of East Africa’s largest labels, AI records, and has opened a new office in Lagos to focus on the region.²⁶ Universal has additionally signed established artists from Ghana, South Africa, Côte d’Ivoire, Togo, and Cameroon, as they build a pan-African music operation.

23 Phoebe Park, “From Afrobeat to Akon: Why African Music Finally Has the World’s Ear,” CNN, November 18, 2016, <https://www.cnn.com/2016/05/05/africa/future-african-music/index.html>.

24 Arwa Haider, “Davido, Mr Eazi and How Afrofusion Went Mainstream in the West,” Financial Times, December 22, 2017, <https://www.ft.com/content/b3af2160-e033-11e7-a0d4-0944c5f49e46>.

25 Lhermitte et al., “Cultural Times.”

26 Yinka Adegoke, “The World’s Biggest Music Company is Setting Its Sights on Africa,” Quartz Africa, July 17, 2018, <https://qz.com/1328454/universal-music-group-the-worlds-biggest-music-company-sets-its-sights-on-africa/>.



Lagos fashion and design week 2015. Photo credit: Chidi Ashimole/Wikimedia Commons

In just a decade, music has become a key Nigerian export. The dominance of Nigerian music on African radio and TV stations led to protests in Kenya, where local artists felt they could not build a Kenyan following. In response, Kenya's Ministry of Culture passed legislation directing that 60 percent of content on radio and TV stations must be produced domestically.²⁷

The music industry is contributing to the growth of the creative sector not only in Nigeria, but also in South Africa and Kenya. South Africa's total music revenue is set to reach \$178 million by 2020, supported by revenue from digital music streaming.²⁸ A strong mobile music sector will support rapid growth in Kenya as well. Kenya's total music industry revenue is expected to rise to from just \$22 million in 2017 to \$32 million in 2021.²⁹ Internet penetration and the spread of mobile technology will continue to support increased consumption of digital music.

Fashion Industry

Demand for apparel by African designers is no longer limited to local markets. Western fashion houses have long tapped the African market for inspiration, from Yves Saint Laurent's 1967 "African" collection to Stella McCartney's incorporation of Ankara prints in her spring 2018 collection. Given the long-standing demand for the often bold, bright, and lively nature of African designs, African designers themselves are finally gaining prominence abroad. Amaka Osakwe, designer of the fashion line Maki Oh, gained commercial success thanks to pop sensations Beyoncé and Rihanna, and to former first lady Michelle Obama wearing her styles.

The majority of African megacities now hold fashion weeks to showcase African designers, including Johannesburg, Cape Town, Lagos, Accra, Dakar, Cairo, and Nairobi. In addition to growing the local fashion market, African designers increasingly participate in New York, London, and Paris fashion weeks. Today's African designers are global, often operating in European, American, and African markets simultaneously. The Nigerian designer Deola Sagoe recognized the appeal of African styles when studying in the United States in the 1980s. The core element of Sagoe's designs rely on Aso Oke fabric, a traditional handwoven cloth from Nigeria, which has attracted the attention of Vogue and A-list celebrities.³⁰

27 Bill Odidi, "Our Singers Busy Crying Foul, But Just How Local is Our 'Local' Music?" Daily Nation, August 29, 2015, <https://www.nation.co.ke/lifestyle/weekend/Our-singers-busy-crying-foul/1220-2849900-423kf0z/index.html>.

28 Vicki Myburgh et al., "Entertainment and Media Outlook: 2016-2020," PwC, September 2016, <https://www.pwc.co.za/en/assets/pdf/enm/entertainment-and-media-outlook-2016-2020.pdf>.

29 Ibid.

30 "Fashionable Business: Deola Sagoe, Others Driving the Continent's Multi-Billion Dollar Industry," Ventures Africa, September 10, 2014, <http://venturesafrica.com/fashionable-business-deola-sagoe-leading-africa-towards-15bn/>.

The global fashion industry is projected to generate \$5 trillion in the next decade, and African designers are looking to capture a larger piece of that market. African designers operating at the heights of global fashion are positioned to take a greater share of the \$420 billion luxury fashion industry³¹ and inspire local designers focused on sub-Saharan Africa's \$31 billion apparel and footwear market.³²



Enzi Footwear products are designed and made in Ethiopia for the global market. Photo credit: Enzi Footwear

The African Development Bank's recent launch of the Fashionomics initiative highlights the role fashion can play in economic development. To grow Africa's fashion industry, the initiative looks to promote investment in the sector, increase access to capital for entrepreneurs, and incubate and accelerate start-ups.³³ Fashionomics is actively providing training and knowledge sharing opportunities for today's burgeoning designers.

CASE STUDY: Namibia

The vast Namib Desert is an emerging location for global film companies. Sunshine and five-star resorts close to uninhabited landscapes provide ideal conditions to film box office successes like the 2015 remake of *Mad Max* (which starred the South Africa-born actor Charlize Theron). *Mad Max* provided nine hundred local jobs and brought in \$38 million for the Namibian economy.¹ Building on that success, Namibia's government is working to attract future films by providing monetary incentives for filmmakers and training the local population in film production.^{*2}

¹Nastasya Tay, "Mad Max: Fury Road Sparks Real-life Fury with Claims of Damage to Desert," *Guardian*, March 5, 2013, <https://www.theguardian.com/world/2013/mar/05/mad-max-fury-road-namibia>.

²Malaka Gharib, "'Mad Max' is Mad About Namibia, but Some Namibians Are Mad at the Crew," *NPR*, March 4, 2016, <https://www.npr.org/sections/goatsandsoda/2016/03/04/469070891/mad-max-is-mad-about-namibia-but-some-namibians-are-mad-at-the-crew>.

Trends Undergirding the Growth of CCI

Africa's changing demographics, the growth of the African diaspora and the rise of mobile and internet technology all support CCI growth.

Demographics

Not only is the size of the market for CCI growing in sheer numbers, but the underlying demographic shifts are more favorable to the film, music, and fashion industries. Globally, millennials are responsible for over two-thirds of all streams on Spotify³⁴ and the median Hulu subscriber is just thirty-one years old, showing a strong youth bias in terms of digital media consumption.³⁵ Africa is a young continent. About two-thirds of its population is currently under the age of thirty, compared to just one-third in Europe and North America.³⁶ Over 43 percent of Africa's population currently lives in urban areas, and 90 percent of urban population

31 Luxury and Cosmetics Financial Factbook 2017, EY, 2017, <https://www.ey.com/gl/en/industries/consumer-products/ey-luxury-and-cosmetics-financial-factbook-2017#item2>.

32 Euromonitor International, "Apparel and Footwear in 2015: Trends, Developments, and Perspectives," May 2015, <http://www.euromonitor.com/apparel-and-footwear-in-2015-trends-developments-and-prospects/report>.

33 "African Creative Industries," Fashionomics Africa, accessed August 15, 2018, <http://www.fashionomicsafrica.org/creative/>.

34 Hugh McIntyre, "Millennials are Leading the Spotify Revolution," *Forbes*, April 20, 2016, <https://www.forbes.com/sites/hughmcintyre/2016/04/20/millennials-are-leading-the-spotify-revolution/>.

35 "Hulu Grows to Over 17 Million Subscribers in 2017, Emerges as Powerful Pay TV Alternative Combining Live Television with the Largest SVOD TV Library in the US," Hulu, January 9, 2018, <https://www.hulu.com/press/hulu-grows-to-over-17-million-subscribers-in-2017-emerges-as-powerful-pay-tv-alternative-combining-live-television-with-the-largest-svod-tv-library-in-the-u-s/>.

36 Based on data from the United Nations World Population Prospects 2017, <https://esa.un.org/unpd/wpp/>.

growth will take place in Asia and Africa in the coming decades.³⁷ These young urbanites are more likely to have mobile and broadband access and are increasingly middle class.³⁸

A larger middle class will result in more disposable income to spend on live concerts, movie tickets, and the latest fashions. Between 2011 and 2015, spending in South African households on recreation and culture, and on clothing and footwear, saw a real increase of 57.9 percent and 23.3 percent respectively.³⁹ The shift to a younger, more prosperous middle class will continue to support the growth of CCI.

Communications Infrastructure

The growing penetration of internet and mobile devices throughout the continent supports a more robust CCI market. In sub-Saharan Africa, unique mobile subscriber penetration reached 44 percent by the end of 2017, up from just 25 percent at the start of the decade. In the coming years, the mobile subscriber base is expected to grow 4.8 percent per year. In Nigeria alone, there were 91.6 million internet users or about 45 percent of the population in 2017, most located in urban centers.^{40 41}

On a continent with only one cinema per million people, streaming services will play a pivotal role in the growth of the film and music industries. Mobile payments, well-established in markets such as Kenya, strengthen business models in the music and film industry. Spotify entered the African market with a launch in South Africa in May 2018. Next to the big global players like Spotify, YouTube, and Apple Music, there is a growing number of African streaming services, many focused on delivering African content. The music-streaming service Simfy Africa has grown from the South African

CASE STUDY: iROKO Partners

The idea for iROKO Partners started nearly a decade ago when Jason Njoku, living with his mother in public housing in London, was frustrated that Nollywood's films had no online presence. Today, iROKO Partners is the largest distributor of Nigerian entertainment online and West Africa's fastest-growing internet company. From movie and music streaming, to an array of YouTube channels, iROKO provides Nigerians and the global diaspora a convenient platform to access Nigerian content. The media empire continues to expand starting its own film studio, ROK Studios, and launching iRokoX, a Multi-Platform Network aimed at connecting Africa's digital content creators.

market to include Nigeria and Angola. NotJustOkay, a Nigerian music blog, has visitors from 183 countries.⁴² Similarly, iRoko Partners, a media distribution company, has been extremely successful in both the Nigerian market and globally.

Globalized Entertainment Market

While the market for CCI grows within Africa, globalization opens access to international entertainment markets. The days when Hollywood just focused on the US market are over. The rise of a worldwide middle class has resulted in faster, broader consumption of the industry's content. Filmmakers must consider the box office potential of their films in other regions like China, which would have been a distant concept just two decades ago. Streaming services for music and

37 World Urbanization Prospects: "The 2018 Revision, United Nations Department of Economic and Social Affairs," May 16, 2018, <https://esa.un.org/unpd/wup/Publications/Files/WUP2018-KeyFacts.pdf>.

38 The African Development Bank estimates Africa's middle class to be 350 million people or 34 percent of Africa's population (2014). Africa's middle class continues to grow at a faster rate than total population growth. Additionally, Africa's middle class has led to increased domestic consumption, with consumer spending expected to reach US \$2.6 trillion by 2030; Mthuli Ncube et al., "Tracking Africa's Progress in Figures," African Development Bank Group, May 9, 2014, https://www.afdb.org/fileadmin/uploads/afdb/Documents/Publications/Tracking_Africa%E2%80%99s_Progress_in_Figures.pdf.

39 "Media Release: Living Conditions Survey (LCS) 2014/2015," Statistics South Africa, last updated January 27, 2017, <http://www.statssa.gov.za/?p=9473>.

40 "Nigeria's Internet Users Rise to 91.6m," Communicator, 22 (2017): accessed August 15, 2018, https://www.ncc.gov.ng/thecomunicator/index.php?option=com_content&view=article&id=1572:nigeria-s-internet-users-rise-to-91-6m&catid=32&Itemid=179.

41 The Mobile Economy: sub-Saharan Africa 2018, GSMA, 2018, <https://www.gsmaintelligence.com/research/?file=809c442550e5487f3b1d025fdc70e23b&download>.

42 Funsho Arogundade, "Nigeria's Super Bloggers," PM News Nigeria, January 28, 2013, <http://www.pmnewsnigeria.com/2013/01/28/nigerias-super-bloggers/>.

movies allow content to be marketed and accessed around the world instantaneously.

African CCI is positioned to take advantage of the entertainment industry's global view. A growing number of Africans are native or secondary English speakers, making their products more consumable given the global popularity of the language.

"African CCI is positioned to take advantage of the entertainment industry's global view."

The Diaspora

Global celebrity culture and Africa's growing diaspora work in tandem to accelerate the spread of African music, film, and fashion to international markets. Centuries-long relationships between African, European countries and the United States mean that millions of Africans and people of African descent live in a country outside of their birth. The African Union estimates the size of the African diaspora at 170 million.⁴³ Because of the diaspora and the market power of African Americans in regard to entertainment,⁴⁴ African celebrities are gaining greater recognition in Western countries. South African Trevor Noah, host of the popular American comedy news program, *The Daily Show*, and Academy Award winner and Kenyan-raised Lupita Nyong'o are just two such examples. After her Oscar win, Lupita Nyong'o went on to star, alongside multiple African actresses, in the Broadway musical *Eclipse* about the 2003 Liberian civil war. The play's success highlights a growing appetite for African stories and African voices, often brought to the US market through the African diaspora.

African nations' relationships with countries such as China are spreading African cultural influence eastward. Deputy Director of the Chinese State Administration of Radio and Television, Yan Chengsheng, has expressed interest in bringing Nollywood films to China's highly regulated film market. Chengsheng has argued the quality of Nollywood films needs to improve, but also acknowledged the opportunity, stating "while telling Chinese stories to the world, we are also willing to tell African stories."⁴⁵ As international markets are exposed to the people and culture of Africa, their desire to consume the exports of CCI will rise.

Challenges Facing CCI in African Markets

A number of obstacles inhibit the creative and cultural industries from making a greater contribution to economic growth in African markets. The scarcity of capital remains a top problem for artists and businesses in the industry. Without traditional forms of collateral in a perceived "risky industry," banks and individuals are reluctant to fund creators. Moreover, a lack of sufficient industry data inhibits entrepreneurs from effectively accessing credit when they cannot readily point to comparables to justify projected returns on an investment.

Lack of Funding

Today's funding for the creative industry often comes in the form of grants for non-commercial activities. A United Nations Conference on Trade and Development (UNCTAD) study in Zambia confirmed that the historic tradition of viewing the creative industries from a cultural rather than commercial lens leaves the industry dependent on public funds.⁴⁶ A dearth of African millionaires eager to invest in the creatives leaves many entrepreneurs with few options to turn to for capital. But in more established markets, like Lagos and Cape Town, businesses investing in creative talent are beginning to emerge. Temple Management, a full-service management agency for those in entertainment, art,

43 The African Union (AU) Commission defines the African diaspora as "peoples of African origin living outside the continent, irrespective of their citizenship and nationality and who are willing to contribute to the development of the continent and the building of the African Union."

44 Janie Boschma, "Black Consumers Have 'Unprecedented Impact' in 2015," Atlantic, February 2, 2016, <https://www.theatlantic.com/politics/archive/2016/02/black-consumers-have-unprecedented-impact-in-2015/433725/>.

45 Solomon Elusoji, "China Looks Forward to Opening Its Giant Market to Nollywood," This Day Live, May 22, 2018. <https://www.thisdaylive.com/index.php/2018/05/22/china-looks-forward-to-opening-its-giant-market-to-nollywood/>.

46 Keith Nurse, "Study on Alternative and Innovative Funding Mechanisms for ACP Cultural Industries, European Commission," http://acpculturesplus.eu/sites/default/files/2017/02/02/etude_financements_-_executive_summary_en.pdf.

and media, is working to modernize and professionalize the industry playing the same role that the Creative Artists Agency (CAA) does in the US market.⁴⁷

As CCI matures, banks are beginning to provide new forms of financing. In Nigeria, the Bank of Industry's "Nollywood Fund" and Access Bank's "Access Nollywood" show that the banking industry is beginning to acknowledge the commercial potential of African film industries. However, the amount of capital provided by these funds is small compared to the demand for capital. The Nollywood Fund's maximum borrowing limit is around \$140,000.⁴⁸ While this is well above the average Nollywood film budget of \$40,000, it comes nowhere close to Bollywood's average film budget of \$1.5 million or Hollywood's \$47.7 million.⁴⁹ The lack of financing leads to low budget production resulting in poor quality films with little potential for commercial success beyond the Nigerian market. Creative approaches are sorely needed.

"The prevalence of movie and music piracy in Africa frustrates monetization efforts."

Lack of Intellectual Property Rights Protection

The prevalence of movie and music piracy in Africa frustrates monetization efforts. Lack of intellectual property (IP) rights and enforcement limits an artist's ability to earn a return on investment. The World Bank estimates that for every legitimate Nollywood film sold, nine are pirated.⁵⁰ Furthermore, the Nigerian Copyright Commission (NCC) estimates the country loses over \$1 billion annually to piracy.⁵¹ South Africa

estimates it loses 44 percent of its DVD revenues, 15 percent of which is online.⁵² High piracy also deters international co-production and distribution opportunities in foreign markets. Music is regularly obtained in the Nigerian markets through illegal downloads, rather than legitimate music stores or streaming services that ensure artists receive their portion of a sale.⁵³ Without a functioning IP rights system, many African artists leave the continent to pursue their talents elsewhere.

Recommendations

To fully support and commercialize CCI, governments and international organizations need to take deliberate steps to invest in all aspects of the value chain from creation to consumption. Accurate measurement of CCI's impact on GDP and employment are critical to legitimize the commercial potential of the industry. Two-thirds of African countries have already signed the Convention on the Protection and Promotion of the Diversity of Cultural Expressions,⁵⁴ but their commitment needs to be realized in development strategies by incorporating innovative new policies and enforcement mechanisms to advance and protect Africa's CCI.

To African Governments:

Collect and Track Data

African governments need to expand and consistently track CCI statistics to support policy development and promote private sector investment. UNESCO's 2009 guidelines for measuring the economic effects of the cultural industry prompted many African countries to begin country measurement. Kenya has taken a lead by publishing the Nairobi Plan of Action on Cultural Industries and facilitating the buildout of institutions such as the Music Copyright Society of Kenya and the Kenya Film Commission. However, the availability and quality of statistics varies widely across the continent

47 "Creative Artists Agency," Creative Artists Industry, accessed August 15, 2018, <https://www.caa.com/>.

48 "Nollyfund," Bank of Industry, accessed August 15, 2018, <https://www.boi.ng/boinollyfund/>.

49 Eric Oh, Nigeria's Film Industry: Nollywood Looks to Expand Globally, US International Trade Commission, October 2014, https://www.usitc.gov/publications/332/erick_oh_nigerias_film_industry.pdf.

50 Ibid.

51 Ibid.

52 South African Film Industry Economic Baseline Study Report, National Film and Video Foundation of South Africa, April 2013, <http://nfvf.co.za/home/22/files/Baseline%20study.pdf>.

53 Dionne Searcey, "Nigeria's Afrobeats Music Scene is Booming, but Profits go to Pirates," New York Times, June 3, 2017, <https://www.nytimes.com/2017/06/03/world/africa/nigeria-lagos-afrobeats-music-piracy-seyi-shay.html>.

54 Convention on the Protection and Promotion of the Diversity of Cultural Expressions, Paris, 20 October 2005, available from <http://www.unesco.org/eri/la/convention.asp?KO=31038&language=E&order=alpha>.

CASE STUDY: Nollywood

Nollywood was not a manufactured success, but rather emerged organically from a random confluence of events. In 1990, the Nigerian Television Authority (NTA) decided to stop producing media content and as a result released its in-house talent of actors, writers, directors, and producers. At the same time, video cassettes and video cassette recorders had gained popularity throughout Nigeria and Nigerians craved entertainment that told Nigerian stories. In 1992, electronics salesman Kenneth Nnebue filmed the straight-to-video movie *Living in Bondage* with a budget of \$120,000.⁵³ The film went on to sell more than one million copies and sparked the creation of Nollywood.

Nollywood films needed to remain inexpensive to reach a wide market. As digital technology replaced videotape around the world, stockpiles of VHS cassettes ended up in warehouses throughout Lagos. These same VHS cassettes served as an inexpensive way to distribute Nollywood films. Today, films are often still burned onto CDs, a cheaper alternative to DVDs, and sold for one to two dollars.⁵⁴ While Nollywood faces challenges in transforming itself into a world-class, mature market, the demand and opportunity for African storytelling is evident.

⁵³ Jake Bright, "Meet 'Nollywood': The Second Largest Movie Industry in the World," *Fortune*, June 24, 2015, <http://fortune.com/2015/06/24/nollywood-movie-industry/>.

⁵⁴ Andrew Rice, "A Scorsese in Lagos," *New York Times*, February 23, 2012, <https://www.nytimes.com/2012/02/26/magazine/nollywood-movies.html>.

based on the capacity of a country's national statistics institute.

Countries already exhibiting strong national statistics need to track specific statistics related to CCI's impact on GDP and employment. As more data is collected,

countries can develop more impactful policy and partnerships to meet the needs of CCI.

Enforce Intellectual Property Rights

The successful distribution of music and film relies on stricter IP rights and stronger enforcement mechanisms. Laws need to be less ambiguous and updated to reflect current technologies. Regulating ownership and ensuring creative control over an artist's work will expand potential export opportunities. It will also encourage additional investment as banks can be more certain of a return on investment.

In May 2018, South Africa's highest decision-making body approved the first phase of a new IP policy to improve access to medicine. South Africa's Department of Trade and Industry worked with the United Nations Conference on Trade and Development (UNCTAD) to identify needed stakeholders and industry experts to draft the new policy. While the first phase is focused on public health, a similar method could be followed to develop new IP policies for music and film in future phases and outside South Africa.⁵⁵

Introduce Targeted Funding Schemes and Incentives

The capital made available to CCI by the traditional risk-averse banking model will continue to be insufficient. Without proper financing, artists will struggle to gain access to global supply chains. However, the risk can be mitigated by targeted programs and credit-guarantee schemes established by regional and development banks, and implemented by commercial banks. For example, the ECOWAS Investment and Development Bank (EBID) had started a Cultural and Industries Guarantee Fund (FGIC) to provide financing to West African cultural projects, but the program seems to have not been prioritized after 2015.⁵⁶ These types of programs should be properly funded, staffed and prioritized. Additionally, regional programs targeted as supporting CCI industries, such as the African Development Bank's Fashionomics, should continue to prioritize connecting artists and designers with traditional and alternative financing channels.

African governments should also facilitate strategic alliances between the public and private sectors to

⁵⁵ United Nations Conference on Trade and Development, "South Africa Adopts New IP Policy Improving Access to Medicine," May 31, 2018, <http://unctad.org/en/pages/newsdetails.aspx?OriginalVersionID=1762>.

⁵⁶ ECOWAS Bank for Investment and Development, "Annual Report 2014," 2014, http://www.bidc-ebid.com/wpen/blog/wp-content/uploads/EBID_annual_report_2014_en.pdf.

encourage capital investment. This includes setting aside public funds for partnerships supporting CCI and providing incentives to international companies to invest in Africa's economies. Morocco and South Africa's growing film production industries should serve as models. Government incentives attract international producers, who partner with African companies and hire Africans to assist in production. Similar programs can be used elsewhere in Africa or leveraged for industries beyond film.

Reduce the Cost of Data

Increased digital media consumption will demand increased broadband access and universal Wi-Fi. Only one in every hundred Africans has access to cable internet, and those that do pay exorbitantly more for data than those outside Africa. Telegeography, a research firm, estimated the cost of internet connectivity in Johannesburg at \$9 per month for each megabit per second of capacity, about twenty times the cost in London and ten times the cost in Los Angeles.⁵⁷ In the past few years, there has been a sizable increase in the capacity of undersea cables connecting Africa to the rest of the world. As new cables come ashore, competition has driven prices down. African governments need to support competition by ensuring private sector participation in the broadband economy.

Beyond broadband, Africa's expensive mobile-internet packages force consumers to limit their access to data, reducing consumption opportunities. While increased cable connections continue to drive mobile data prices down, universal Wi-Fi access has the capacity to disrupt traditional mobile phone and cable internet companies. Wi-Fi signals not only carry more data per second than those used by a 4G phone, but the equipment to produce a Wi-Fi network is cheap. African governments should continue to explore innovative approaches to encouraging additional Wi-Fi services through the use of TV white space to expand the consumer base for CCI. Malawi and South Africa's partnership with Microsoft in this area can serve as test cases for potential scale up elsewhere on the continent.⁵⁸

To the United States

Given the competitive edge the United States has in the entertainment industry,⁵⁹ American policy-makers should consider establishing a US-African CCI financing roundtable. This public-private platform should be led by the Overseas Private Investment Corporation (OPIC) and would draw upon sector experts to facilitate financing and investments that contribute to CCI growth. Knowledge exchange and collaboration among key actors will deepen understanding of Africa's CCI market opportunities and risks. The roundtable should work to establish pathways of investment that can be packaged for investors with different appetites for risk.

To International Organizations

The World Bank and IFC can better support CCI by creating job positions with responsibility for financing Africa's creative and cultural industries. While the IFC works with clients in media, technology, and retail, it has not established an area of expertise in CCI. Taking a holistic view of the industry will better position the IFC to meet the needs of the industry's interconnected players. Given the potential development impacts of CCI, these institutions need to dedicate the necessary talent to support the growing financial needs of the industry.

International organizations also need to take a role in tracking the impact of CCI. While the last decade has led to a rise in the capture of CCI-related statistics, the lack of annual, continent-wide measurements of CCI remains. The World Bank should work with UNESCO to expand statistics related to the economy, trade, and the private sector to include statistics dedicated to CCI. While UNESCO tracks a variety of statistics related to cultural employment and feature films,⁶⁰ African countries are not routinely represented in all statistics.

57 "Beefing Up Mobile-phone and Internet Penetration in Africa," The Economist, November 9, 2017, <https://www.economist.com/special-report/2017/11/09/beefing-up-mobile-phone-and-internet-penetration-in-africa>.

58 David L. Johnson and Chomora Mikeka, "Malawi and South Africa Pioneer Unused TV Frequencies for Rural Broadband," IEEE Spectrum, August 29, 2016, <https://spectrum.ieee.org/telecom/internet/malawi-and-south-africa-pioneer-unused-tv-frequencies-for-rural-broadband>.

59 Aubrey Hruby, Escaping China's Shadow: Finding America's Competitive Edge in Africa, Atlantic Council, September 7, 2017, http://www.atlanticcouncil.org/images/Escaping_Chinas_Shadow_web_0907.pdf.

60 United Nations Educational, Scientific, and Cultural Organization, "Welcome to UIS. STAT," accessed August 15, 2018. <http://data.uis.unesco.org/>.

Conclusion

The digitized, global economy provides an opportunity for African CCI to play a more meaningful role in the continent's development. From artists to distributors, Africa's creative economy can provide modern jobs across multiple sectors and contribute to economic growth. Additionally, sharing African creativity with global audiences helps to change perceptions, encourage tourism and lays the groundwork for myriad cultural exchanges. African governments, businesses and investors must recognize the value of CCI, as without their support and promotion, the industry will find it increasingly difficult to remain competitive in global markets. Africa has long been rich in talent and creativity, and in today's maturing markets, these artists and producers have the potential to stake their claim as part of the global mainstream.

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