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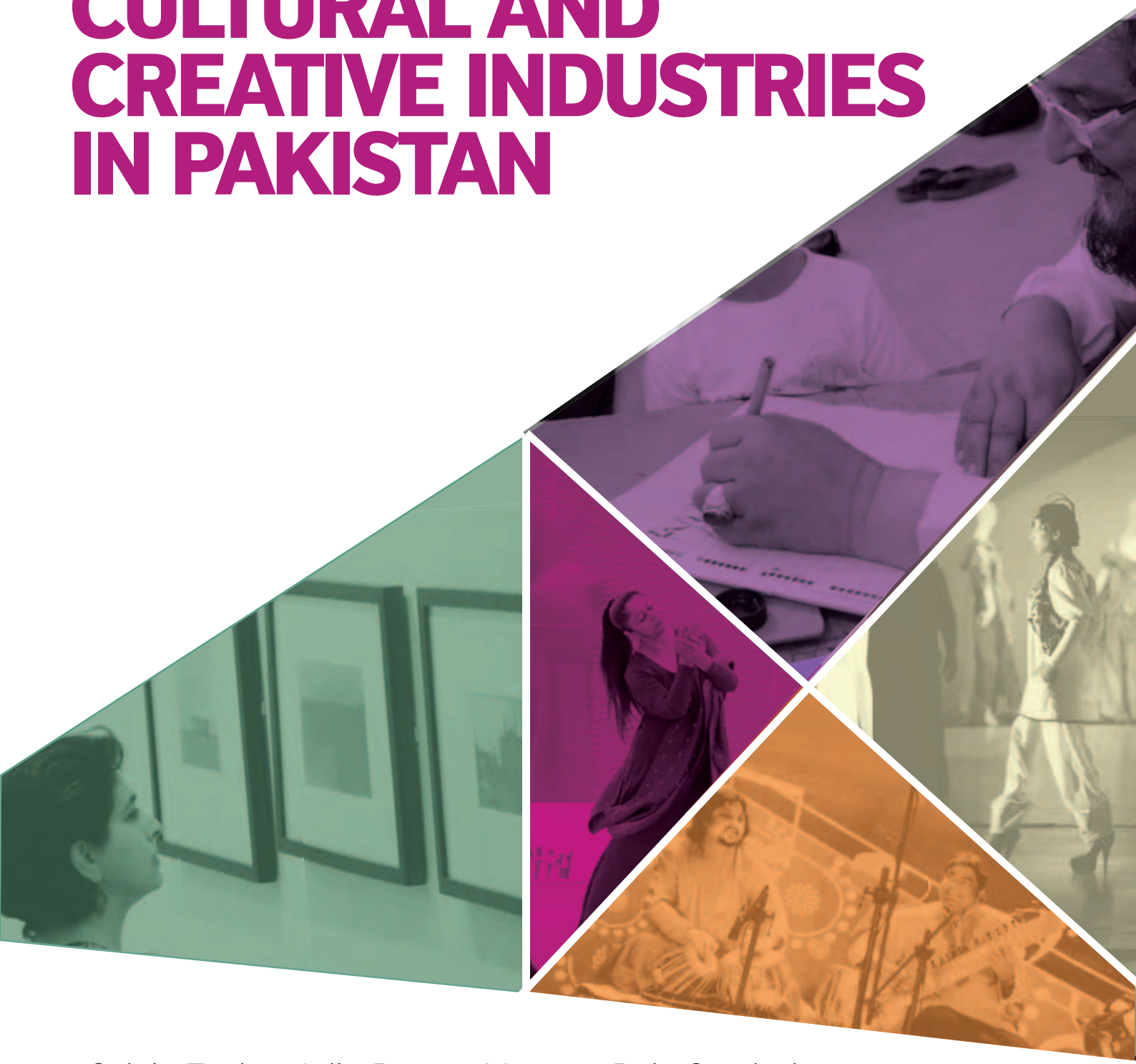
CULTURAL AND CREATIVE INDUSTRIES IN PAKISTAN



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FOREWORD

Cultural and Creative Industries in Pakistan underscore their importance not only as economic catalysts for national growth and pathways to employability. The Creative Industries also affirm cultural identity, projecting a multifaceted international image of a vibrant Pakistan. Moving beyond traditional media stereotypes this report provides a broad overview of the challenges faced by the creative sector and makes practical recommendations to sector groups, policy makers and the financial sector. It demonstrates that the Creative Industries in Pakistan can be an essential component of economic growth, generating billions of income and millions of jobs. But a strategy and policy framework is needed for the next stage.

The Creative Industries in the UK are now worth 71 billion pounds and account for 1.7 million jobs. They are worth 8 million pounds an hour, every hour, to the UK economy. Beyond these headlines are important trends: employment in the Creative Industries is growing faster than other sectors, the skill sets for those who work in this area are more flexible and so employability rates are high. The Creative Industries in the UK are a good news story, but it wasn't always this way. For now, there is much that the UK and Pakistan can share.

Cultural and Creative Industries have influenced national cultural policy in many countries across the world since the late 1990's. Governmental attitudes have varied, based on local resources and the needs they chose to address by investing in particular creative sectors. Some have been very successful such as the UK whilst others have focused on niche areas of development. A coherent strategy has always been the common factor for success, strategy linked to clear policy implementation and targeted resourcing. Where these have been harnessed the results have been impressive.

Since 2007 the creative economy debate in Pakistan has revolved around the cultural industries. Advocacy in this area has been successfully led by UN agencies, who have argued for the preservation of traditions and heritage and socio-economic inclusion of rural populations. These are important elements and can significantly contribute to the Cultural Industries. However, Pakistan has far more to offer and the broad landscape is far richer and more diverse.

This report draws attention to the importance of the Creative Industries in realising the human development agenda in cities. As urban infrastructures extend tenuously to accommodate an ever-increasing influx of rural migrants and persevere against a range of security challenges, specific trends begin to emerge: disenfranchised groups in economically polarised environments, limited employment opportunities for a growing population of young people and increasing intolerance amongst religious and ethnic groups. All of these point to the necessity for creating channels whereby people can generate income through enterprise, allowing them to express themselves and be valued for the

distinction they bring to the mix. The Creative Industries have always provided a route for these and other groups to harness skills and develop productive opportunities.

On a governmental level, culture has always been "situated" in Pakistan's rich repertoire of folk traditions. It is limiting to define Pakistani cultural identity in this way, without accounting for the vibrant subcultures of its cities, which are particularly local but also conversant with global trends. Governmental resistance to accepting non-traditional cultural manifestations is not uncommon. The situation was no different in many Arab states where policies were hinged on heritage. The Arab Spring however repositioned the role of digital expression in driving innovation and creativity so effectively that governments have had to create policies supporting ICT. Pakistan is far ahead of the game in having governmentally funded university incubators but they are limited to technology-based businesses. If these hubs allowed for cross-pollination with other design-led disciplines they could catalyse unprecedented innovation.

Scores of creative businesses already cater to international clientele. However their economic and social contribution goes unrecognised. This report provides an inspiring glimpse into what has been achieved by the sector despite systemic obstacles. By facilitating access to skills, professional and entrepreneurial, creating opportunities for equity finance and affecting international agreements that allow for the free flow of cultural products and services, Pakistan could unlock sustainable revenue streams that would give it a competitive edge in the countering of negative media reporting.

The Creative Industries are here to stay in Pakistan. What is in question is whether the strategy, the policy levers and the investment can be realised that will enable the Creative Industries to be central to cultural, social and economic development. If they are, they would be a boost to economic growth, provide diverse opportunities for employability, creativity and human capital, but more importantly would reaffirm Pakistan's cultural identity as inclusive, vibrant and exciting. That's why this report is important.

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The interpretations offered in this report are those of the authors and do not necessarily represent the views of the British Council, its officers or the individuals who contributed to the research.

KEY FINDINGS: PAKISTAN'S CULTURAL AND CREATIVE INDUSTRIES

Pakistan's Cultural and Creative Industries: Overview

Pakistan's contemporary creative economy is founded on a rich and diverse cultural, creative and artistic heritage. Visual arts and crafts, books and press, performance, audio-visual and interactive media, and design and creative Services are all well represented nationally, with strong representation in some sectors provincially. Common to many developing countries, the urban centres and their emergent middle-class populations are major arenas of creative endeavour with international connections and markets, providing new opportunities, particularly for Pakistan's youthful population. In addition, rural Pakistan makes its own contribution with a highly diverse set of craft, literary, musical and performance activities contributing to a nationwide creative economy. Sectors such as crafts and design are creating economic opportunities for Pakistani women, who are also increasingly represented in other Creative Industries sectors. The uptake of new technologies is also set to engage wider sections of Pakistan's population in creative opportunities beyond those typical of the urban centres.

Economic Contribution: Employment

The available evidence suggests that the Creative Industries are an important contributor to the employment base of the Pakistani economy. As much as 15% of all employees nationally are accounted for in the crafts and related services sector alone. This is important both in the urban as well as rural areas. There are indications that there is growing employment activity in the audio-visual and interactive media and design and creative services sectors, which are, in the main, urban in location. Whilst there is some employment associated with visual arts, performing arts, literature and music, employment patterns are more fragmentary and typically combined with activities in other sectors. The arts components of the Cultural and Creative Industries evidence higher levels of voluntary and social enterprise working than other Creative Industries sectors.

Skills and Talent

Interviewees express confidence in the developing skills base of Pakistan's Creative Industries. Particular strengths, evidenced by securing international contracts and finance include technical skills in audio-visual media, interactive media design, animation, film and television, photography, post-production skills, festivals and events staging. There are, however,

important gaps. Professionalised arts and cultural management skills are highly underdeveloped and in short supply. Some capacity building has been undertaken by international cultural organisations such as the Goethe Institute and the British Council, but particular areas of shortage include human resources, finance and fund-raising, networking and communications, marketing and audience development. In the commercial Creative Industries there are gaps in terms of finance and investment skills, collaboration, and marketing and customer relationships. There were routinely reported shortages in key creative skills areas such as script-writing and screenplay writing across the areas of performing arts, film and television, and concerns were expressed about the longer-term viability of some areas of craft skill, as younger generations turn to other opportunities. However, there are emerging good models of higher education provision in some areas of creative skills; performance, fashion design and visual arts being commonly cited. However, there are also equally cited gaps in film and television making, audio-visual and interactive media and arts and cultural management. In addition to critical gaps, the higher quality education and training provision that is available has limited places.

Economic Contribution: Financial Value

Statistics on the financial contribution of Services more generally are not available in Pakistan. However, the data that is available (very fragmentary and out of date) suggests that Pakistan's share of the total value of creative exports from developing countries declined between 2003 and 2008. As the value of exports from developing countries grew at an average annual rate of approximately 10%, the growth rate for Pakistan has been approximately 5% per annum. Data for a similar period shows that Pakistan has been a consistent net exporter of creative products and a net importer of creative services. The data resources needed to calculate the contribution to either Gross Domestic Product or Gross Value-added are not available and these figures cannot be estimated.

Technological Infrastructure and Digital Platforms

Whilst contemporary devices are beyond the means of most Pakistanis, there is a growing uptake of technology. Mobile phones are ubiquitous and with the impending advent of 3G and 4G, smart-phone options will become more widely available, enabling the development of on-line business models. Broadband is good in some areas, but users do report unreliability. However, Pakistan has one of the fastest growing communities of internet users who are driving the development of internet service providers and a growing software industry.

Profile and Brand Identity

At present Pakistan does not possess an international brand identity or profile for its creative products and services, despite some success in securing contracts, especially in areas of new media. Whilst the export of textile materials is a national success story, it is not linked to a narrative of Pakistan's creative economy. Some activities such as music, dance and literature do have some international cultural recognition and visibility. Contemporary visual art is particularly recognised in the Middle East, North Africa and South Asia region. However, this public recognition does not yet extend to the broader Creative Industries. Indeed, interviewees report that even in international projects and contracts it has been necessary to downplay in part or altogether the role of Pakistani creative talent out of fear of unsettling international clients. This is clearly underselling Pakistan's creative talent and potential. Interviewees also routinely referred to a short-term cultural preference for 'quick money' rather than longer-term investment in brand building.

Business Environment

Whilst there are some emergent platforms for collaboration and mutual support, interviewees report that organisations and individuals across all sectors tend to work in relative isolation. Collaboration and interaction are largely hesitant and pragmatic, rather than seen as opportunities to be developed. Similarly, there were few instances of collaboration with the wider Pakistani settler communities in other countries. There is only a limited shared culture of celebrating the sectors' activities and successes. Networking tends to be based on strong ties that may start as locally as the family and then extend only as far as family friends and the closest of professional associates. Interviewees routinely reported issues associated with a lack of trust, poor business practices and dealings, intellectual property theft and unreliability in financial matters. Much of this reflected interviewee perceptions of wider economic conditions where corruption, tax evasion, business illegitimacy and lack of financial transparency encourage circumspection and wariness.

Business Start-up

There is a strong entrepreneurial culture within the Creative Industries of Pakistan. Interviewees, both in their own experience and reporting on wider sectoral knowledge, cite determination, resilience and tenacity as important personal characteristics typical of Pakistani creative entrepreneurs. We regularly saw a strong sense of vision, but as noted above, often without the full set of skills or networks required to fulfil the aspiration. Pakistani higher education, with the notable exception of fashion, provides only a few and at best emergent opportunities to develop the entrepreneurial skillset and outlook necessary for creative entrepreneurship. Typically new entrepreneurs reported learning by trial and error with few models or mentor experiences to draw upon. There are nationwide public business support and development networks which are active, with success, in the craft sector, but which are yet to extend into other areas of the Creative Industries. There are also third sector international business networks especially targeted at young entrepreneurs, but at the moment, these are not connected to the Creative Industries in any structured or specific way.

Finance and Growth

Interviewees report the absence of awareness of the Creative Industries among Pakistan's national banking, investment and financial sector. This is reinforced by a perception among the creative community that the potential of the Creative Industries is not yet understood among Pakistan's public policy-makers. There is, however, a growing sense that there are private sector investors willing to consider investments in new media and film. Whilst there is some national investment in arts and culture (increasingly being devolved to the provinces) the international donor community is a visible contributor to the arts and cultural infrastructure, particularly supporting exhibitions, educational outreach work, sector development initiatives, especially in visual arts, crafts and performance. There are a number of publicly underwritten small and micro investment schemes, but these are not yet connected to the Creative Industries in any structured way.

Career Entry-points and Development

Entry to working in the Creative Industries is through a limited number of conduits. Family history in the Creative Industries was significant for many of our interviewees. This applied irrespective of educational background or socio-economic status. Rural craft interviewees followed in parental footsteps. Practitioners in visual arts, music, performance and literature also spoke about the importance of prior family connections with these activities. Those without prior family experience reported concern and even resistance on the part of family and parents in response to ambitions to work in the Creative Industries. Nearly all our interviewees spoke about a national culture of conservatism when it came to career

choices, especially for those who have been able to pursue education to higher levels. Although few of those participating in higher education abroad were influenced by the experience to work in the Creative Industries, an international education was an important formative experience for many of our informants. Wider family networks were reported as important, especially in gaining work experience. Internships and voluntary assignments were common. Nearly all our interviewees indicated a lack of recognisable career paths in the Creative Industries.

ACTIONS AND RECOMMENDATIONS

For the Cultural and Creative Industries Sector

1. Leadership and advocacy: At the present time, the 'voice' of the Creative Industries in Pakistan is fragmented in a range of ways: socially, generationally, sectorally and geographically. Whilst it would be impractical, and most likely impossible, to develop a single voice, even, for example, by sector, greater collective industrial self-awareness will lead to stronger and potentially more influence with, for example, public policy, international donors and higher education, as well as a greater shared sense of aspiration. The Cultural and Creative Industries should seek ways of raising the visibility of current and potential leaders. A Cultural and Creative Industries Leadership Forum and Network should be considered in conjunction with the FPCCI and SMEDA. This should also interact with formalised entrepreneur networks.

2. Profile, identity and brand: The visibility of Pakistan's Cultural and Creative Industries is developing nationally but doesn't yet have a clear international profile. There is clear confidence in the potential for Pakistan to develop a distinctive international profile based on a combination of historic indigenous cultural expression and contemporary business models, building on regional visibility and Pakistan's substantial emigrant communities. The new Leadership Forum should be encouraged to work with SMEDA, the Ministry of Commerce and Pakistan's export support structures to showcase and promote the Pakistani cultural and creative brand.

3. Networks and collaboration: The Cultural and Creative Industries are widely known to depend on knowledge exchange through and across networks and project collaborators. There are good examples of collaboration and the mobilisation of networks in Pakistan to achieve significant internationally visible objectives such as the Karachi and Lahore literature and literary festivals, drawing on a wide range of international, national and provincial contributors. At the other end of the scale there are examples of self-organisation such as Desi Writers' Lounge that mobilise new and emergent talent. Representatives of the Cultural and Creative Industries should investigate the value of networked collaboration, perhaps beginning with good case studies and examples.

4. Skills, training and knowledge: There is an emerging awareness in both higher and vocational training about current skills gaps, both in creative and cultural technical skills on the one side and transferable skills such as enterprise, use of technology and communication on the other. However, whilst there are some good examples of

localised skills development initiatives, especially in crafts, there are major gaps in capacity and relevance across the breadth of the Cultural and Creative Industries. The Cultural and Creative Industries should work with higher and vocational education providers to assess the scope and scale of future skills and knowledge demands.

5. Markets and economic sustainability: At present there is little shared knowledge about markets and their potential, thus limiting the potential scale of opportunity. In addition, there are major gaps in understanding business models, finance and investment and intellectual property. The FPCCI should be encouraged to work with SMEDA and the range of national and international enterprise networks to both raise and spread the level of knowledge available to entrepreneurs and practitioners.

For Public Policy

1. Policy knowledge and awareness: At the present time the level of shared awareness of the international and potential national significance of the Cultural and Creative Industries is limited. The Cultural and Creative Industries have little or no visibility in current policies for education, skills, trade, clustering, supply chains, enterprise and finance. In addition, there are gaps in the statistical resource base, limiting understanding about trends and opportunities. In addition there are major gaps in sectoral knowledge such as international business models, intellectual property and collaboration. The Cultural and Creative Industries Leadership Forum described above should be formally recognised by national and provincial public policy and should be a member of a national Cultural and Creative Industries working group comprised of the relevant ministries and provincial departments, with additional representatives from the education, skills and finance fields to work on the issues identified above.

2. Skills and education: The Cultural and Creative Industries have the potential to raise the overall skills level of society at large, and especially those sections of society starting from a lower base. However, this needs vigorous public policies to achieve it. There is evidence of growing demand in the higher and vocational education sectors but capacity is limited and there are few opportunities for lower income candidates to access appropriate education and training. Government should be encouraged to look to expand funded places in the higher and vocational education sectors across a range of areas including creative skills, conservation and preservation, creative enterprise and cultural management.

3. Investment, trade and sustainability: At the present there are a number of public funds dedicated towards supporting the development of enterprise and a number of initiatives designed to promote exports. SMEDA, working with the FPCCI and other relevant bodies should be encouraged to ensure that they are both aware of the opportunities represented by the Creative Industries and that such funds are attuned to the particular risk and return profiles of these activities. There may also be opportunities for hybrid investment with both public and private investors. All parties should contribute to the development of sector specific international branding opportunities.

4. Finance and regulation: Representatives of the Creative Industries routinely identify a lack of financial transparency in business dealings, leading to unsatisfactory business practices. Government should be encouraged to consult with representatives of the Cultural and Creative Industries on ways in which the financial and legal aspects of trading could be improved.

5. Innovation and growth: Particular areas of the Cultural and Creative Industries offer innovation opportunities for other industries. Public bodies, working with universities and sector representatives should develop initiatives designed to both understand such value and support its growth.

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LIST OF ABBREVIATIONS

AHAN	Aik Hunar Aik Nagar
GDP	Gross Domestic Product
GEM	Gender Empowerment Measure
GNI	Gross National Income
HDI	Human Development Index
HE	Higher Education
HEI	Higher Education Institution
HEC	Higher Education Commission
ICT	Information Communication Technology
ILO	International Labour Organisation
LFS	Labour Force Survey
MLMOP	Ministry of Labour, Manpower & Overseas Pakistanis
PBC	Pakistan Broadcasting Corporation
FPC	Fashion Pakistan Council
P@SHA	Pakistan Software Houses Association
PEMRA	Pakistan Electronic Media Regulatory Authority
PETF	Pakistan Education Task Force
PIDE	Pakistan Institute of Development Economics
PES	Pakistan Economic Survey
PSEB	Pakistan Software Export Board
PTA	Pakistan Telecommunications Authority
NGO	Non-Governmental Organisation
SMEDA	Small and Medium Enterprises Development Agency
UNDP	United Nations Development Programme
UNCTAD	United Nations Conference on Trade and Development
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNIDO	United Nations Industrial Development Organisation
OUP	Oxford University Press
WIPO	World Intellectual Property Organisation

INTRODUCTION

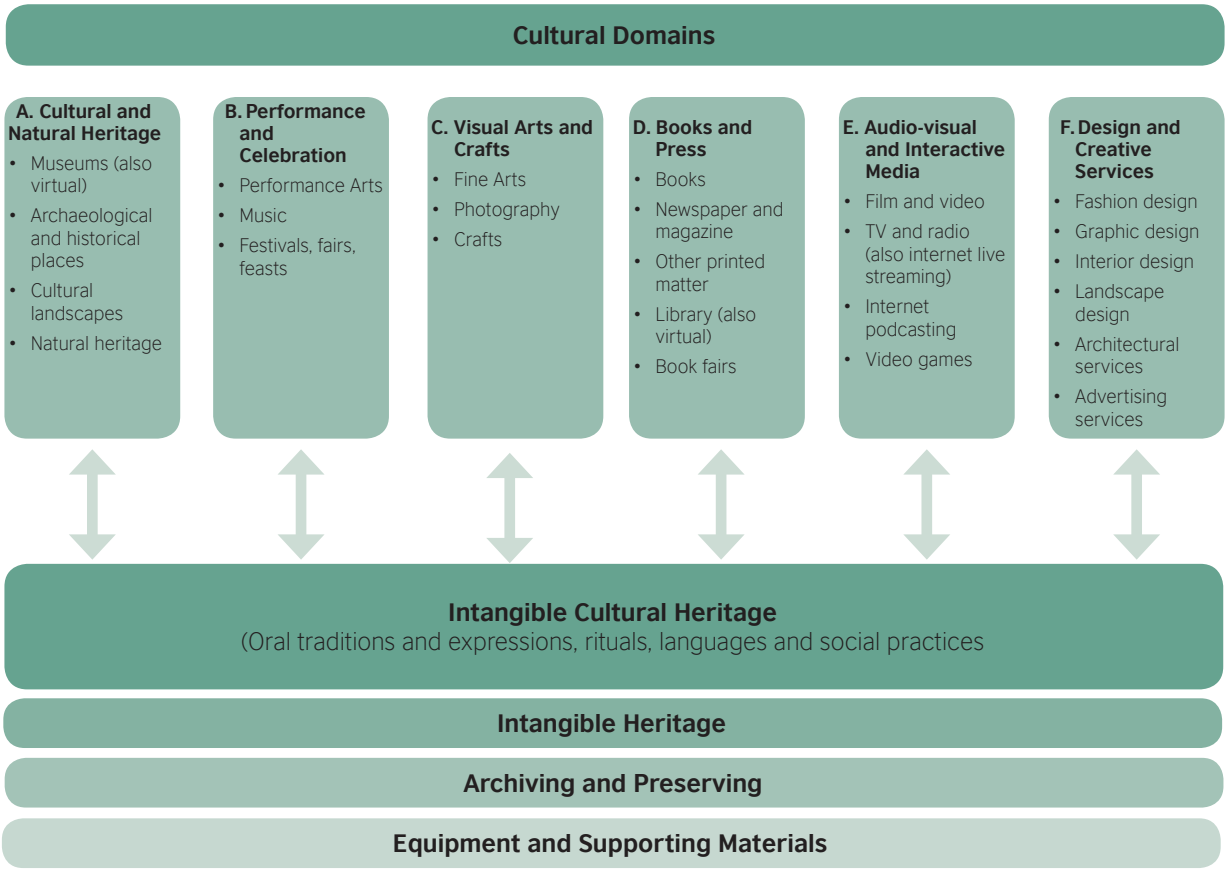
Governments and civil society now regard the Cultural and Creative Industries as important contributors to economic growth and social development in nearly all parts of the world. In its latest assessment of their contribution, UNESCO acknowledges their importance for economic growth, but equally recognises their ability to contribute to sustainability and civil society. Indeed, the report argues for a holistic view of the role that such activities play (UNESCO/UNDP 2013). It has now become customary for countries to undertake their own assessments of the value of the Cultural and Creative Industries, and this report provides an initial assessment of the role that the Cultural and Creative Industries play within the economy and society of the Islamic State of Pakistan.

The idea of culture and creativity as a new and evolving industrial activity with wider social, economic and cultural impacts is one which has developed over a long period of time (O'Connor 2007 & 2010). Although it has its origins in the industrial northern hemisphere, its adoption across the world suggests it possesses a global relevance and application that transcends geographical and cultural boundaries. However, the concept is sufficiently flexible for individual countries and geographical locations at the supra and sub-national levels to be able to visualise their own Cultural and Creative Industries. The definition for evaluation and assessment purposes has also undergone technical refinements, with important contributions from the United Kingdom, North America, Australasia, European Union and United Nations bodies including UNESCO, UNCTAD, UNIDO and WIPO.

Whilst there is no global consensus on the precise definition, a growing number of countries are evaluating and considering adopting the Framework for Cultural Statistics ratified by UNESCO in 2009 (UNESCO 2009). It is this framework that underpins the latest UNESCO Creative Economy Report (UNESCO/UNDP 2013).

The 2009 Framework is especially useful in the context of Pakistan. It provides a set of lenses through which individual cultural activities can be grouped into what it calls 'cultural domains'. Cultural activities are defined widely and inclusively and include specific creative and artistic activities, ways of life, values, traditions and systems of belief. A 'cultural domain' is based on an aggregation of activities that share similar cultural characteristics. It is important to point out that mode of economic operation is not the deciding factor. A domain may include activities that are conducted on a for-profit basis, as independent cultural expressions, or as part of a community activity. In that sense, the Framework is economically neutral, but, capable of capturing important differences. However, the endpoint of the cultural or creative activity is not the only consideration. The Framework also proposes that cultural and creative activities be understood as subject to a chain of activities which are necessary to bring an idea or an expression to fruition in the experience of the end consumer, participant or user. Cultural and creative activities are then understood to be situated within cycles of activity in which new ideas, artefacts and expressions are; created, produced, distributed and brought to actuality in the lives of consumers and audiences. The idea of a cycle enables consideration of the totality of activities, resources and practices needed for a given cultural or creative activity to take place.

Figure 1: UNESCO Cultural Domains



Source: UNESCO (2009) Framework for Cultural Statistics

The Framework proposes six 'cultural domains' (see figure 1 above). For the purposes of this report we will refer to these as 'sectors':

a. Cultural and Natural Heritage
b. Performance and Celebration
c. Visual Arts and Crafts
d. Books and Press
e. Audio-visual and Interactive Media
f. Design and Creative Services

For the purposes of this report, and due to scope and time constraints, some adjustment has been made to these sectors. We have omitted Cultural and Natural Heritage as these activities are subject to large-scale studies by other bodies, particularly, UNESCO. Performance and Celebration has been restricted to performing arts and music. Again, practical considerations of accessibility and time, place restrictions on capturing the celebratory components of this sector. In all other sectors we have aimed to engage with all major activities.

Using this lens, this project has four objectives:

1. As far as possible, quantifying the potential contribution of the Cultural and Creative Industries to Pakistan.
2. Identifying opportunities for the development and growth of the Cultural and Creative Industries in Pakistan.
3. Identifying potential barriers to that development and growth.
4. Identifying areas for potential intervention and action.

This is not the first occasion on which the Cultural and Creative Industries in Pakistan have been evaluated. Both UNIDO and UNESCO,

and WIPO have undertaken some element of research into particular aspects of the Cultural and Creative Industries, especially crafts and copyright industries respectively. In 2007, UNIDO and UNESCO concluded that Pakistan's craft industries would benefit from being classified and promoted under the concept of the Cultural and Creative Industries and offers opportunities for specific geographical locations to engage in creative region brand exploitation (see UNIDO/ UNESCO 2007, 90). In 2009, WIPO commissioned an evaluation of the contribution of the copyright industries to the Pakistani economy. Based on data for 1999-2000, WIPO's report estimated that the core copyright industries (newspaper and printing, data processing and IT, social and cultural services, recreation services and radio and TV broadcasts) contributed over PKR 48bn in value added to the Pakistani economy, and that between 2000 and 2008, they grew at annual rates of between 5.4% and 9.8% (WIPO 2011).

In this report, we have aimed to add qualitative depth and insight into how these sectors are developing; important potential opportunities; significant barriers, and where appropriate, have suggested actions which might be undertaken to support their development. The report is presented in four chapters. Chapter 1 provides a brief summary of the methodology used. Chapter 2 offers a brief statistical overview of the economic, social, demographic, technological and educational profiles of Pakistan to set the context, especially for those unfamiliar with Pakistan. Chapter 3 offers profiles and findings for each of the sectors set out above. Chapter 4 offers an overview of the sector as a whole, focusing on areas of comparative strength, significant opportunities and barriers, together with suggestions for action.

CHAPTER 1
METHODOLOGY

The research for the report was undertaken in two phases. First, a desk-based literature and a statistical review were conducted. This was followed by fieldwork involving in-depth interviews and a series of round table meetings with practitioners, policy makers, educationalists and business support organisations in Pakistan.

1.1 Literature and Statistical Review

A thorough review of existing national and international-level research and data on Cultural and Creative Industries in Pakistan revealed a very fragmented literature and corresponding statistical picture. At the present time, the national statistics and data collection processes of the Pakistani government do not provide the data resources from which to make sectoral economic valuations, especially in the services sector and this has impact on the value of existing statistics.

As a result, Pakistan currently lacks the detailed labour market and economic data from which a meaningful economic assessment of the value of the Cultural and Creative Industries can be made. This is not simply a manifestation of the traditional challenges of statistically representing the Cultural and Creative Industries using international standard industry classification codes (See UNESCO 2009). The current thrust of national development in statistical resources is focused on manufacturing, rather than services, the latter being where much of the specific sectoral activity of the Cultural and Creative Industries is located. It has been a fairly recent development that data on the services sector has been separately identified in the national statistics. However, these statistics are only compiled at an aggregate level and there is as yet no sub-sectoral disaggregation thus preventing any meaningful identification of specific sectors. This challenge is compounded by the absence of the kind of national business database which typically drives the data gathering activities of national and governmental statistics agencies. Again, the Pakistan Bureau of Statistics has just embarked on developing such a database, but is focusing on manufacturing in the first instance.

In place of such data, reports by international NGOs including UNESCO, UNCTAD, UNIDO, UNIPO and WIPO and national sector bodies were reviewed. Specific issues addressed in these reports included youth and Creative Industries, women and Creative Industries, Creative Industries and poverty alleviation as well as issues of copyright. These reports highlight a number of developmental challenges for Pakistan's economy and the creative and cultural industries in general.

Sectoral data was also collated, where possible, from a number of secondary sources including reports from Governmental departments such as PEMRA, PSEB, SMEDA, P@SHA and PTA. However, this data was originally collected for a variety of purposes, timeframes and

audiences and needs to be handled carefully. Other sources included websites and reports from industry representative organisations such as the PFC, support organisations (e.g. AHAN), as well as private support initiatives (e.g. Danka), which were used to help build provisional profiles of the main component sectors of the creative and cultural industries.

Our strategy, therefore, in preparing this report is to bring together in one convenient place the work that has been done, and to draw some broad inferences from it. However, it should be noted that very little of the data collected by third party agencies corresponds consistently with any particular technical definition of the Cultural and Creative Industries. Data was collected by these agencies at different points in time and for different purposes.

Broader national background statistics on demographic and population profiles and employment and economic trends were gathered from a number of different national sources including:

- Pakistan Bureau of Statistics Labour Force Survey (LFS), 2012-2013
- Ministry of Finance Pakistan Economic Survey (PES), 2012-2013

These were supplemented with material from international bodies, where necessary and available, including ILO, UNESCO and UNDP.

1.2 Field Interviews and Round Table Discussions

Whilst the statistical material gathered provides some, if fragmentary insight into possible industry and economic trends, the research project was also designed to consult with industry figures, educationalists and public bodies. We therefore also designed a set of interactions with a key informant group to gather qualitative data in order to assess sectoral opportunities, challenges and possible actions.

A range of informants were identified by the research team and invited to take part in either personal interviews or round table discussions with other informants. Informants were identified according to a pre-designed typology and included sector representatives (established and emergent professionals), educationalists (senior and staff) and relevant policy bodies, especially in the small business development sector. These were agreed between the members of the research team. The individual interviews with practitioners were designed around a set of core topics which included: sector entry and career pathways; organisational development; markets and branding; sector networks and profile, collaboration and knowledge exchange; finance and skills. These topics were adjusted for policy-makers and educationalists to focus on the equivalent educational and policy actions and priorities. The round table discussions were designed to facilitate interaction between professionals in cognate fields of creative work. These were designed to test the sense of consensus around the types of issues identified above. In all 95 informants were consulted either through individual interviews or round table discussions. Most of the interviews and round tables took place at British Council offices with some interviews undertaken at public venues including galleries, museums and business premises.

Fieldwork took place in two sessions: 26 January 2014 to 1 February 2014 and 23 February 2014 to 1 March 2014.

CHAPTER 2
COUNTRY PROFILE

2.1 Geographic And Demographic Profile

Pakistan has gone through several transformations in the political, demographic, social and economic spheres since its foundation in 1947. The country has experienced successive direct and indirect wars, and periods of democratic and undemocratic government, while the economy has undergone a series of 'boom and bust' cycles (UNESCO 2011a). Pakistan faces challenges associated with a burgeoning youth population, high levels of under-education, fast-paced urbanization, significant gender inequalities, and a difficult devolution process.

Pakistan is divided into four provinces - Sindh, Punjab, Balochistan, and Khyber Pakhtunkhwa—each with a unique ethno-linguistic identity, together with the Islamabad Capital Territory, the north-western Federally Administered Tribal Areas, the northern semi-autonomous Gilgit-Baltistan region, and Pakistan administered Kashmir (known locally as Azad Jammu and Kashmir). Sindh and Punjab are comparatively more developed, and are the country's industrial and agricultural hubs. A Muslim-majority country, 75% of the population identify as Sunni Muslim and approximately 20% as Shia Muslim (the Sunni Muslim community is further subdivided into various sects) (UNESCO 2011a).

Pakistan's estimated population is 184.35 million (Ministry of Finance, 2013), making it the sixth most populous country in the world. Although the population growth rate has slowed and now stands at 2.0% per annum (Ministry of Finance 2013), the total population is still expected to exceed 260 million by 2030, and 335 million by 2050 (British Council 2009). Pakistan is a young society: the median age is 22.2 years (male: 22.2 years; female: 22.3 years) and the 0-14 year group accounts for 34% of the population (Ministry of Finance, 2013). As a rapidly growing country, two thirds of whose population are under the age of 30, the country's demography presents both opportunities and challenges.

Youth education is a key issue with 32% classified as uneducated (Planning Commission of Pakistan, 2011); and less than 5% of the population is educated to degree level (Ministry of Finance, 2013). The Pakistan Education Task Force (PETF 2011) reported that 1 in 10 of the world's primary aged, not-in-school children live in Pakistan. Furthermore, there are significant drop-out rates of pupils before they reach Grade 5 (63% boys, 77% girls, 2011) (UNESCO, 2011b).

Significantly, fewer than half of the country's females ever go to school (UNESCO 2011b). Literacy rates are much higher for men (71.1%) than for women (48.1%) (PBS 2013). While 5.6% of males are educated to degree level, only 3.8% of females are educated to an equivalent level (See table 1).

Although the Constitution of Pakistan gives equal rights to men and women, according to the Gender Empowerment Measure (GEM) 2007—which quantitatively measures the empowerment of women on a country basis—Pakistan ranks

Table 1: Level of Education – Distribution of Population 10+ years of age by sex (%)

Level of Education	2010-11			2012-13		
	Total	Male	Female	Total	Male	Female
A. Literate	**58.5**	**70.2**	**46.3**	**59.8**	**71.1**	**48.1**
No formal education	0.4	0.4	0.4	0.7	0.8	0.6
Below matric.	38.0	45.4	30.2	37.9	44.7	30.8
Matric. But <Intermediate	10.8	13.2	8.4	11.4	13.8	8.8
Intermediate <Degree	4.8	5.7	3.9	5.1	6.2	4.1
Degree and above	4.5	5.5	3.4	4.7	5.6	3.8
B. Illiterate	**41.5**	**29.8**	**53.7**	**40.2**	**28.9**	**51.9**
TOTAL (A+B)	100.0	100.0	100.0	100.0	100.0	100.0

Source: Source: Pakistan Bureau of Statistics, LFS 2012 - 2013.

82 among 93 countries (UNDP, 2011). In sub-indices including women's economic participation, educational attainment and health, the country lies among the bottom five (UNESCO 2011c).

There are also provincial variations in educational attainment. Provincial data suggest that Punjab and Sindh leads with over 61.3% and 61.5% literacy respectively followed by Khyber Pakhtunkhwa with 54.2% and Balochistan with 49.8%.

National Education Policy (2009) aims to address the issues of access, equity and quality of education at all levels. Under this policy, the government is committed to allocate 7% of GDP for education and provide free universal primary education by 2015. The Pakistan Education Task Force (PETF, 2011) estimated only around 2% of GDP was being spent on education in 2011. Even if evenly distributed amongst Pakistan's school children, the current budget would amount to only approximately $50 per child per year (PETF 2011).

Increased need and low Government investment have resulted in a significant growth of non-state sector educational provision. Enrolment in private sector education institutions is estimated to be between 25% and 35% depending on the source (PETF 2011). The majority of these schools can be classified as "low cost private schools" (LCPS) catering to children from low income families. Enrolement in LCPS appears to be more gender equitable (Andrabi, Das & Khwaja, 2006). There is, however, a need to help LCPS develop better quality educational provision (Wheeler and Egerton-Warburton 2012).

2.2 Economic And Demographic Trends

Recent high inflation, fuel and energy shortages, recurrent environmental disasters, as well as food and security fears have acted to curb economic growth and investment. Although the economy still grew by an annual average of 2.9% over the last 5 years, this is in contrast to predictions of more than double this level (Ministry of Finance 2013).

Pakistan's population expansion means the country is also urbanising at the fastest rate in South Asia. It is estimated that by 2030, half the population will live in cities, up from 37% at present (Ministry of Finance 2013). Both natural increase and net migration from rural to urban areas are major contributory factors to urban growth (Ministry of Finance 2013). The population of Karachi, for example, has doubled in 15 years to more than 18 million people, making it one of the largest cities in the world. Rapid urbanisation has brought with it challenges including urban poverty, lack of space, utility supply problems, housing shortages and waste management. Lack of resources and a near-absence of urban planning and management also threaten the historic urban

environment (UNESCO 2011a).

Still an agrarian economy, the agriculture sector remains the largest provider of employment (43.7% of total labour force). However, the services sector is now estimated to account for more than half (57.7%) of Gross Domestic Product and has emerged as the main driver of economic growth, while agriculture by contrast accounts for only 21.4% (Ministry of Finance 2013). This has made the development of non-agricultural rural industries a national priority.

Most people are engaged in some form of economic activity, regardless of working age or financial reward. Social welfare support is very limited. The official unemployment rate in Pakistan therefore tends to be low. Official unemployment is around 7% (Ministry of Finance 2013). However, there is a large informal economy and under-employment particularly among young people is extremely high (British Council 2009). The informal sector is estimated to account for the majority (73.6%) of non-agricultural employment –and is particularly high in rural areas (77.4%). According to the United Nations 2011 Human Development Report, 49.4% of the population suffers multiple poverty deprivations.

The youth unemployment rate is high at 10.3% in 2010-11, and the rate for young women 4.0% higher than for young men (ILO 2013). Youth in Pakistan face various disadvantages including limited job search expertise, a mismatch between education, aspirations and employers' requirements and a lack of mobility, among other factors (MLMOP 2008). A survey of the next generation (18-29 year olds) found that half believe they do not have the skills for the modern labour market. Even those with good qualifications are struggling to find decent employment, and are struggling against discrimination and corruption (British Council 2009).

Quality of employment is a challenge, especially for women. Although the female labour force participation rate has increased in recent years, converging with the South Asian average, it ranks tenth lowest out of 189 countries in the world (ILO 2011). In 2010-11, 74.2% of working women aged 15 and above were located in the agricultural sector, compared with just 34.9% of men (ILO 2013). The ILO recommended a comprehensive approach to improving labour market outcomes for women through skills development, access to child care, maternity protection, and provision of safe and accessible transport, along with the promotion of a pattern of growth that creates job opportunities (ILO 2013).

Nonetheless, Pakistan is estimated to have a middle class that is around 35% of the total population (substantially higher in urban areas) (PIDE/Nayab 2011). Increased disposable income led to a rise of 12.8% in consumption in Pakistan in 2011, and consumer spending increased at an average rate of 26% between 2010 and 2012, compared with 7.7% for Asia as a whole (Euromonitor International 2012). Between 2006 and 2011, household incomes in the urban areas rose faster than inflation by an average of 1.5% per year. Given the low median age, Pakistan's middle class is unusually young compared to developed economies, meaning that a proportion of the younger population will have access to rising levels of disposable income. This group is a central driver of the urban economy and represents a significant source of enterprise as well as driving consumption and leisure patterns.

Total consumer expenditure (in real terms) is forecast to rise by 0.7% in 2014. In the period 2012-2020, it is estimated that total consumer expenditure will grow at an average annual rate of 2.9%, and it will increase by a cumulative value of 25.9% during that period. During the period 2012-2020, total disposable income is also forecast to increase by a cumulative 25.7% in real terms, growing at an average annual rate of 2.9% (Euromonitor International 2014).

2.3 Technology Uptake

The adoption of new

technologies has been rapid since the launch of the internet in Pakistan in 1996. However, even in the urban centres of Karachi, Lahore and Islamabad, technology uptake by consumers is still low by international standards. There are 2.54 million broadband subscribers (Ministry of Finance 2013) and according to the World Bank, 29 million people - 16% of the population - have access to the internet (World Bank 2012). The country does not currently have a 3G or 4G network and therefore mobile internet access remains very limited. This may, however, change if the planned auction of 3G and 4G licenses is successful. By contrast, two thirds of the population now have access to the use of a standard 2G mobile phone (Ministry of Finance 2013).

According to PEMRA, there are 12 million television sets in the country—approximately one for every 14 people (PEMRA 2010). Communal television watching is typical, and radio use is dominant in rural areas. More than half of all television viewers are only able to access state-run, analog terrestrial broadcasts. Digital cable television still has an extremely limited reach due to the high cost of set-top boxes and slow adoption of digital infrastructure by cable companies (PEMRA 2010).

2.4 Civil Society

Pakistan is currently suffering from a security situation that has a considerable impact on the everyday life of its citizens. However, there is a highly liberal media environment and vibrant civil society (UNESCO 2011a). Corruption is however officially recognised as endemic and represents a major reason for widespread popular distrust of political institutions and political leaders (British Council 2009). Tax evasion is extensive and contributes to diminished investment in public services and basic infrastructure, exacerbated by rising security demands on budgets, both national and for organisations and individuals.

Despite the continuing challenges, the political situation has reportedly improved. Federal and provincial elections held in May 2013 marked the first democratic handover in Pakistan's history and may stimulate more effective governance and policy-making in the coming years. In addition to initiating power-sharing mechanisms, crucial women-empowerment bills have been enacted and there is an independent judiciary now in place (UNESCO 2011a).

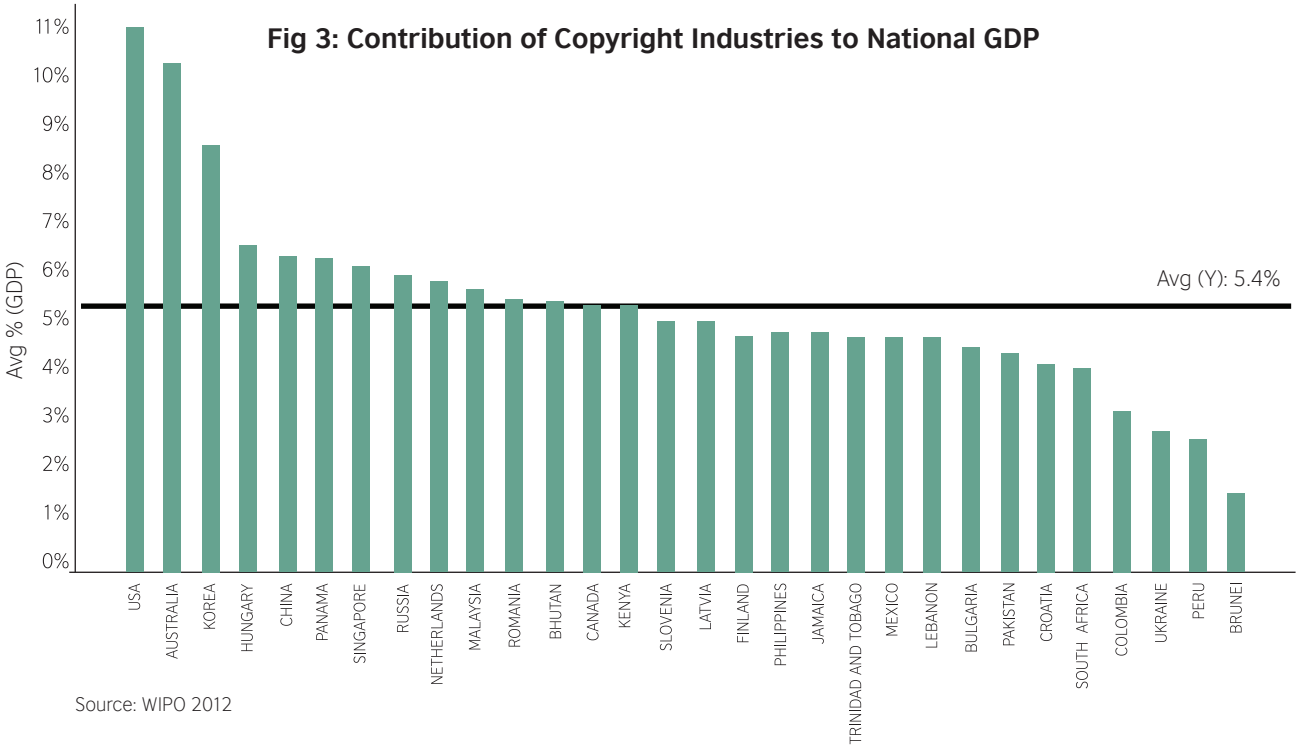
Table 2: Selected Socio-economic Indicators

Population	184.35 million
Population Growth Rate (Avg. Annual)	2.0%
Urban Population	37.9%
Urban Population Growth Rate (Avg. Annual)	3%
GDP	225,143 billion USD
GDP Growth Rate	2.9%
GDP/Capita	1,256.7 USD
GDP/Sector	Agriculture 21.4%; Industrial Sector 20.9%; Services 57.7%
Employment in Sectors	Manufacturing 14.1%; Construction 7.4%; Agriculture 43.7%; Services 13.3% ; Trade 14.4%; Transport 5.5%
Unemployment (% of Labour Force)	7.0%
Labour Force Participation	Male 49.4%; Female 15.5%
Sex Ratio (Males/100 Females)	106
Life Expectancy at Birth	66.5 (Female) and 64.6 (Male)
Fertility Rate (Live Births/Woman)	3.3 Children per Woman
Infant Mortality Rate/1000 Live Births	67.5
Literacy Rate	58.9% Total. Males 71.1%; Female 48.1%
Education Level	4.7% Degree or above; Male 5.6%; Female 3.8%

Source: Pakistan Bureau of Statistics, LFS 2012-2013; Ministry Of Finance, Economic Survey 2012-2013.

CHAPTER 3
THE CULTURAL AND CREATIVE INDUSTRIES IN PAKISTAN

Fig 3: Contribution of Copyright Industries to National GDP



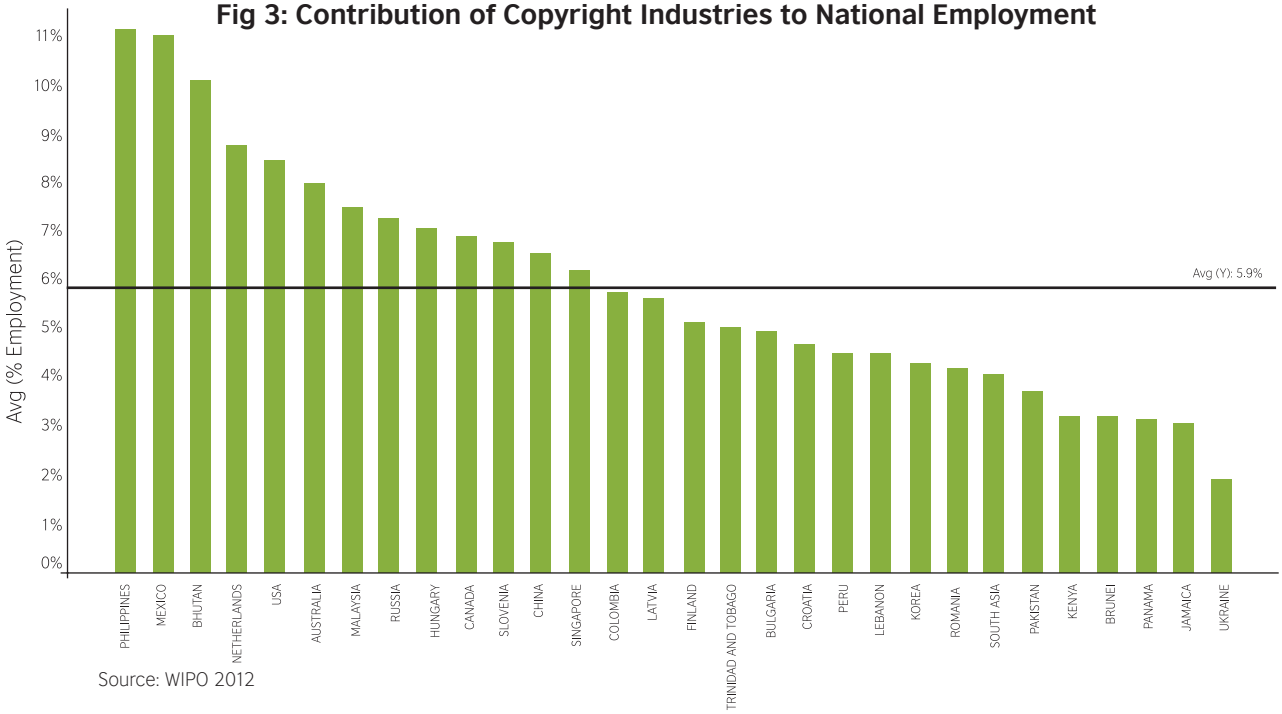
Source: WIPO 2012

3.1 Introduction

This chapter provides an overview of the Cultural and Creative Industries in Pakistan, and then examines each of the major sectors in turn. The activity of each sector is profiled, supported by economic data where it is available. Then, drawing on interviews and round table discussions with industry figures, entrepreneurs, educationalists, support organisations and practitioners, the report identifies potential opportunities for growth and development, barriers to the realisation of that potential and offers a range of actions.

WIPO estimates that of the 40 countries in which they have conducted research into the copyright industries, in three quarters of these, they suggest that these activities contribute between 4 and 6.5% of GDP with an average of 5.4% GDP. Countries that have experienced rapid economic growth typically have

Fig 3: Contribution of Copyright Industries to National Employment



Source: WIPO 2012

an above-average share of GDP attributed to copyright industries (WIPO 2012). Pakistan is slightly below average at 4.5% GDP.

WIPO also estimated the contribution of these industries to national employment is an average of 5.9%, with nearly three quarters of countries falling in the range of 4 – 7%. Most countries with an above average share in GDP also have an above average employment. Again, Pakistan is below average at 3.71% (Note: this fiigure is for 2006).

In the case of Pakistan, sectoral changes in numbers of enterprises and employment suggest that graphic design has now overtaken employment in cultural and recreational services as the dominant sector with 44.2% of employment (WIPO 2011).

However, despite these growth rates, Pakistan's share of exports in Creative Goods from both developing countries in general and its neighbours in particular have been consistently falling. As Appendix 2, Table 1 indicates, whilst annual export growth rates of Creative Goods from

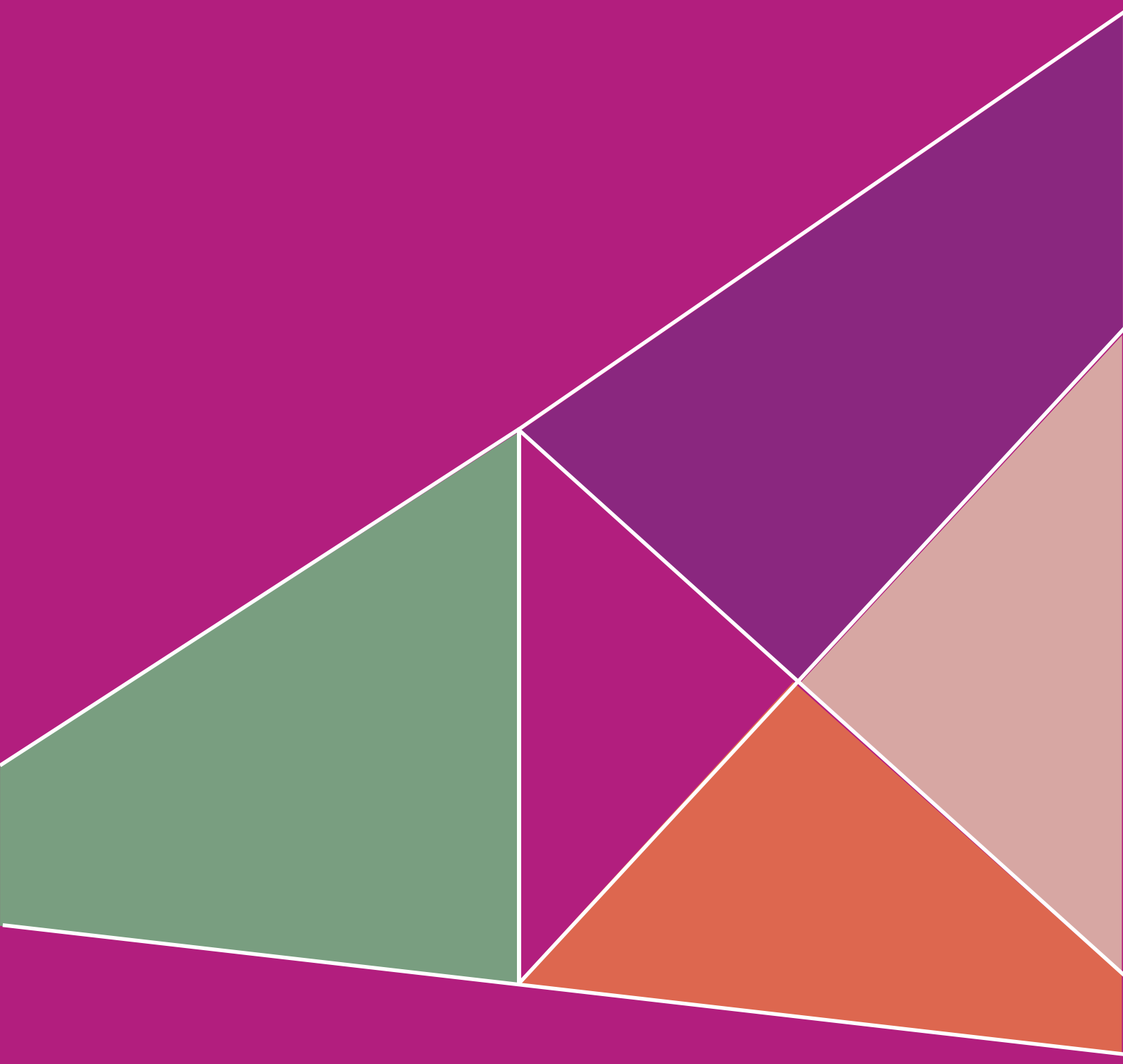
Table 3: Pakistan Employment Contribution by Core Copyright Sector:1999 & 2007

	Number of Enterprises		Estimated employment			
	Year		Year			
Sector	1999	2007	1999		2007	
Newspaper & printing	1344	1820	26160	7.61%	38780	6.11%
Data processing & IT	50	1101	990	0.29%	24222	3.82%
Radio & TV broadcasting	20	1422	6500	1.89%	44700	7.04%
Graphic design	30000	67000	90000	26.19%	268000	42.22%
Photography	15000	18000	45000	13.09%	54000	8.51%
Cultural and recreational services	N/A	N/A	175000	50.92%	205000	32.30%
TOTAL	46414	89343	343650	100.00%	634702	100.00%

Source: Based on WIPO (2011). Note: Employment in cultural and recreation performance sector has been included as a rough estimate only due to lack of data.

developing countries and Pakistan's neighbours have been increasing at over 13% and 10% per annum, Pakistan's export growth has been pegged at just over 5% per annum. By contrast (Appendix 2, Table 1), imports of Creative Goods, fuelled by rising disposable incomes, have maintained pace with import growth rates in developing countries and run ahead of growth rates in neighbouring countries (Appendix 2, Table 4). The picture for Creative Services is broadly the same (Appendix 2, Table 2). Pakistan is losing its share of Creative Services exports from developing countries (Appendix 2, Table 5). Exports from industries related (support activities) to the Creative Industries (Appendix 2, Table 3) show a share less than 1%.

3.2 PERFORMANCE



3.2.1 Overview

The performance sector includes: performing arts (theatre, dance, drama, puppetry and music)

3.2.2 Sector Profile

Performance is pervasive in Pakistani society and is part of both its pre-Independence heritage and its subsequent national and provincial development. Puppetry, mimicry, story-telling, dance, music and drama are represented throughout the provinces of Pakistan and are represented in both traditional and contemporary forms. Performance is both intimate to the culture and society of daily life, as well as institutionalised in theatre and embraces both Urdu and English as languages of theatrical expression. Anwar Maqsood's Paunay 14 August, a political satire in Urdu ran for approximately 100 shows. The contemporary repertoire draws from both traditional and modern, with some evidence that musicals are growing in popularity. The popular American musical Grease ran in Karachi for 25 shows in 2013. Theatre also comprises professional, amateur and social activist productions and companies and grew through the development of campus theatre groups and venues. Lahore is widely regarded as a centre for theatrical activity with the Al-Hamra hosting many public commercial productions in Punjabi. However, there is some evidence that professionally produced theatre may be dwindling in Lahore due to changes in linguistic preference towards Urdu.

Professionalisation and the creation of a modern professional culture are a contemporary priority, although, as a number of our interviewees noted entry to performance as a professional career is often dependent on parental and family historical engagement. At the present time, there are few opportunities for the formal study of performing arts to a professional standard. An exception here is the National Academy of Performing Arts in Karachi.

The Karachi Arts Council venue, adjacent to the Academy, is an opportunity for the Karachi professional theatre practitioners to present their work and gain experience. Both venues run events on a commercial basis. Commercial cabaret has developed in Lahore, especially catering for the business community with a repertoire drawn from comedy.

Theatre as a medium has also been driven by the activist sector. Companies such as Tehrik-e-Niswan led by Sheema Kermani and Ajoka founded in 1986 by Madeeha Gauhar has been active in raising social and political issues in Pakistan using theatrical means.

Music in Pakistan has made a world breakthrough in the last 30 years with both qawwali, especially in the earlier part of this period, and Sufi music enjoying international audiences. As with theatre, music in Pakistan is a combination of traditional and modern. Alongside the qawwali music of the Sufi religion, traditional forms such as the poetic form originated from Persia - the ghazal - is also highly valued. There are, again, as in theatre, provincial musical differences with the Bhangra of the Punjab being perhaps one of the most internationally recognisable forms. However, contemporary forms are also important. Pakistan has enjoyed a rock scene since the 1960s and contemporary Pakistani pop music draws on a folk Sufi heritage associated with Coke Studio. Although live concerts with corporate sponsorship were comparatively common in the 1990s, the live music scene has given way to a screen-based music scene. There is also a growing genre of musical satire.

3.2.3 Opportunities

Whilst traditional theatrical and musical forms continue to attract audiences, contemporary productions are increasingly in demand. There are major interactions between live performing arts and television and film, especially with respect

Traditional and Modern: The Rafi Peer Theatre Workshop

Launched in Lahore the 1970s, the Rafi Peer Theatre Workshop is a non-governmental body dedicated to the promotion of the performing arts globally. Since its inception it has grown to encompass the Rafi Peer Cultural Centre (which houses The Museum of Puppetry and an Arts and Crafts Village and a café/ meeting space); it has promoted over 60 festivals including The World Performing Arts Festival; The International Folk Puppet Festival; The Youth Performing Arts Festival; The International Mystic Music Sufi Festival; The International Film Festival and the Saanjh Amritsar Lahore Peace Festival; developed creative educational programmes for Pakistani children and now also includes an artist's management company, complete production studio & post production facility for video, animation & music. The company embraces both traditional and modern forms and encourages international cultural exchange and participation. Rafi Peer also focuses on robust outreach programmes that include initiatives for awareness development and education. Their relationship with children of Pakistan is of a 30 year personal interaction through creative arts and puppetry which mainly aims is to provide learning through entertainment.

Professionalising Theatre: National Academy of Performing Arts (NAPA)

The National Academy of Performing Arts in Karachi was founded in 2005 to build a national professional capacity in theatre and music. Although small (it only takes 30 students per year in theatre and graduates approximately 10, and a similar number in music) it has built a reputation for producing talented actors and directors who develop their skills in theatre – both within the academy and in outreach work. Whilst the educational and training programme of the Academy is funded by government, the Academy offers a programme which aims to achieve professional standards and play to fee-paying audiences. The Academy has two performance wings NAPA Repertory Theatre and NAPA Music to create professional opportunities of performance for the graduates. NAPA also stages an annual International Theatre Festival in March now in its 3rd year.

"NAPA aims to become the leading resource for theatre and music training, research and performance in the country with our graduates adding value to the increasing interest in theatre and music performance."

Zain Ahmed – Creative Director, NAPA

to opportunities for performing artists. Many actors cross over between these forms. There is then the basis for a growing demand for acting talent that is flexible between cultural forms.

The successful promotion of performing arts and music festivals in Pakistan offers a major platform for a range of creative activities, services and products. The festival as a way of organising the Creative Industries is growing world-wide with festivals rapidly becoming the vehicle for inter-disciplinary collaboration, knowledge exchange and innovation.

Cross and trans-disciplinary working models are becoming global norms with close interaction between theatre, literature, film and television. This provides, again, a platform for both traditional and contemporary theatre and music.

3.2.4 Sector-specific Challenges

The performing arts occupy an ambivalent position within the cultural value systems of Pakistan. Performing art-forms are subject to periods of social disapproval and even restriction, impeding the development of sustainability. Our interviews pointed particularly to the effect that an elite disapproval of more popular art-forms can have, especially in terms of making a case for public support. Performing arts especially have been the subject of public disapproval raising questions about who makes such evaluations and on what terms? Thus, as Zain Ahmed, Creative Director of the National Academy of Performing Arts (NAPA) explained, it was not uncommon "for students to have not seen a stage play before taking up a place in the Academy."

As with other areas of the Creative Industries in Pakistan, there are persistent cultural barriers to collaboration and interaction, inhibiting the development of wider performing arts identity and profile. Interviewees find it hard to acknowledge or celebrate the work of other practitioners, except those who are regarded as important historical figures. The lack of experience of collaborative working will inhibit the development of an awareness of the sector's importance and value.

Our informants unanimously raised persistent issues of finance. In a society without an institutionalised means of funding performing arts, much professional performance (and more ambitious amateur performance) are dependent on external funding (through international donor schemes and occasional sponsorship). It is unlikely that the public funding regime will change to any significant extent – none of our interviewees regarded this as likely. This places an emphasis therefore on the role of box office to future performing arts sustainability. However, as our interviewees commented, a commitment to participation in a society with wide disparities in economic resource makes ticket prices a very sensitive issue.

Our interviewees attested to the quality of much performing arts work, and, especially skills. However, there were a number of gaps. Shortages in good quality script-writing were mentioned (not only in theatre, but also in film and TV) by several interviewees. The development of a financially sustainable theatre sector is also hampered by a lack of key skills in management, marketing and audience development. This was a problem across all the different forms of theatre and music. In general there was very little engagement from and with higher education.

The performing arts sector faces the country's endemic security problem. Wherever large numbers of people are gathered together they can become either a threat or a target. The World Performing Arts Festival produced by the Rafi Peer organisation was bombed three times and a further three unsuccessful attempts were made on it before it closed down. Other festivals by the same producers such as the Youth Performing Arts Festival

and the International Mystic Music Sufi Festival, however, continue. Many live performance events are now by invitation only, reducing the potential audience. However, as other festivals such as the Lahore Literary Festival has shown, it is possible to host a secure festival using international models of security but at a financial and socially accessible cost.

3.2.5 Sector-specific Actions

1. Promote an awareness of the cultural importance of performing arts in key areas such as higher education to begin the process of developing curriculum and campus theatre initiatives.
2. Encourage the development of a national performance practitioner's forum to initiate discussions about a collective sectoral identity and profile and promote locally-based performing arts networks to improve the local visibility of performing arts practice.
3. Identify key public bodies and (provincial, national and international) donor communities to target with key messages about the educational, civic and community value of performance.
4. Raise awareness about performing arts within national and provincial public lending and investment initiatives.
5. Liaise with public authorities regarding the specific security challenges of performing arts and to develop models of good security practice.
6. Build on Danka to develop a national/provincial/local performing arts events calendar.
7. Develop a national performing arts directory to raise the profile of individual companies.

3.3 VISUAL ARTS AND CRAFTS

3.3.1 Overview

The Visual Arts and Crafts sector includes: fine arts, contemporary arts, photography and crafts. In Pakistan it encompasses contemporary and historical visual arts, contemporary decorative arts and crafts in textiles, stone-carving, embroidery, papier-mâché, block printing, jewellery, woodwork, ceramics, beadwork, glass-making and contemporary vernacular creative practice such as truck art.

3.3.2 Sector Profile

Pakistan as a country and the geographical space it inhabits are rich in visual arts and crafts. Successive ancient settlements in the Indus Valley region have extended the craft vernacular of Pakistan which has distinctive provincial and local traditions. Its' artistic and artisan inheritance continues to develop and flourish in the contemporary world as indigenous visual artistic traditions engage, for example with traditions of western painting and globally available trends such as computer and digital art. Visual arts are especially well covered in the mainstream press where new exhibitions are reviewed and generate comment. Significantly, as Sameera Raja of Canvas Gallery explained: "Artists come from all walks of life."

Contemporary Pakistan is the home to a dynamic contemporary visual arts sector represented in public galleries such as the National Art Gallery of Pakistan but also served by an increasing number of commercial galleries and spaces, in the main urban centres. Commercial galleries such as Canvas, Gandhara-Art and Ejaz Art Gallery exhibit and sell contemporary Pakistani artists in a variety of styles and genres. The marketing website Karachi-snob.com currently lists 24 independent galleries in Karachi and its sister site 21 for Lahore. The social enterprise sector is also active in the visual arts and is represented by, for example, VM Gallery housed within the Rangoonwala Community Centre in Karachi. A range of business models underpin the art gallery sector including commissions, re-sale, focused exhibitions and ad hoc sales. At this point, however, visual artists with international reputations and visibility tend to be represented by international and off-shore galleries and agents. Contemporary visual arts are also breaking out of the traditional gallery setting and can be found in restaurants, public meeting spaces and public and private office spaces. Public art is represented in the major urban centres, but there is no systematic approach to public art commissioning.

The inhabitants of Pakistan have created a rich craft heritage over at least 5,000 years. Periodic migrations and settlements across the Indus Valley by Persians, Greeks, Arabs and Muslims, have added their distinct cultures to Pakistan's artisan-maker heritage. Craft activities are distributed extensively through Pakistan's four provinces and are found in both urban and rural environments. It is estimated that crafts and related employments represent a significant source of employment in Pakistan at approximately 15% of all national employment. Craft industries, furniture making and handloom industries have traditionally been widespread secondary employment activities in Pakistan (UNCTAD 2010). It is important to point out that most of the activity in the craft sector is still informal and comparatively undocumented (WIPO 2011), and therefore the true size of the sector is unknown. However, organisations such as SMEDA have been active in developing initiatives to both promote and preserve important areas of craft such as Multan blue pottery which contributes to a growing base of knowledge and documentation.

Craft practices are intimately connected to both place and home. Currently, a very large majority of crafts are produced for personal and family use only and the income from most crafts is estimated at less than the daily labour rate in the country (WIPO 2011). Quality of product is a recognised issue, as is lack of copyright (WIPO 2011). Although Pakistan is in the top 10 exporting countries for crafts, at the moment this sector is reported to contribute very little to GDP,

Table 4: Craft and Related Service Workers by Province and Gender (% total employed) 2012-3

Province	Total			Rural			Urban		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Khyber Pakhtunkhwa	12.24	1.44	13.68	8.89	1.24	10.13	3.34	0.20	3.55
Punjab	13.15	2.81	15.96	6.80	1.67	8.46	6.35	1.14	7.49
Sindh	11.91	1.30	13.20	2.57	0.67	3.24	9.34	0.63	9.96
Balochistan	5.23	2.74	7.98	2.33	2.32	4.66	2.90	0.42	3.32
Pakistan	12.39	2.28	14.67	5.78	1.40	7.18	6.61	0.88	7.49

Source: Pakistan Bureau of Statistics, LFS, 2012 - 2013. NB No further sub-analysis of this data is available.

but significantly to employment and, therefore, represents an important opportunity. The potential is already in evidence. As Kiswar Naheed, the founder of the Hawwa women's textile producers supply chain initiative explained, since being founded more than 20 years ago, the improvement in earnings for those women in the initiative has enabled them to send their daughters to school.

For this reason, craft represents a potentially important contribution to the economic and social sustainability of villages and households and is an important industry for women, who currently account for approximately one-fifth of all craft sector workers nationally. Export activity might be enabled in the future through skills training and higher value product design (WIPO 2011). Our craft interviewees did have occasional access to international markets and marketing opportunities but these are comparatively rare and largely reliant on international donor programmes and local initiatives. Third sector and voluntary initiatives to assist in the development of the crafts industries are emerging.

3.3.3 Opportunities

Pakistan's Visual Arts and Crafts sector is rooted in an extensive nation-wide creative base, with a complex and diverse ethnic and provincial heritage. Alongside this heritage there is a vibrant urban contemporary art scene with new galleries regularly opening in the major urban centres catering for more affluent tastes. In both cases there are opportunities for growth and enhanced value-added.

In the case of crafts, the national government, provincial governments and organisations such as UNESCO have all recognised that crafts represent an important economic opportunity with the potential to anchor more sustainable rural economies based on the household and through village co-ordination. The government Small and Medium Sized Enterprise Development Agency (SMEDA) has been particularly active in the ceramics, jewellery and textiles sectors since 1998-9 when it began to take a more sectorally focused approach in its business support programmes. A number of public and voluntary initiatives have developed models geared to raising the quality, market-prices and returns to the artisan-maker. Historically, intermediaries have tended to encourage makers to depress the quality of their products as a price competitiveness strategy. However, evidence from a number of reports and interviews suggests that there is a growing urban demand for higher quality craft products. A number of both public and voluntary initiatives have aimed to capitalise on this. One such initiative is AHAN.

Contemporary visual arts have been an important component of Pakistan's post-independence heritage in which Pakistani artists have explored both their own artistic context, and their relationships to wider global trends in visual art. In the urban scene, galleries, cafes

The Ecology of Truck Art

Truck art is an indigenous and ubiquitous art form. Vehicles used for road haulage, construction and passenger transport are subject to complete and extensive colourful decoration based on a palette of primary colours with subtle embellishments of secondary colour. Motifs blend myth, legend, landscape and flora and fauna to create a carnivalesque appearance. Completing a painted makeover is a complex process. The owner will work with the drivers to identify an appropriate team of body-workers and painters to undertake the work. First the body-workers will extend the cab, fenders, tipper and wheel arches. Then, for a large vehicle, a team of five primary painters will colour the panels to create a canvas for the detail workers. Another team of five highly skilled detail painters will then add the decorative designs. A team of ten painters will take approximately one month to complete a large vehicle, but will need several vehicles a month to make a living wage. The intermediaries play an important role in signposting owners to teams of body-workers and painters. Once on the road, the vehicle's paintwork might be touched up annually – but by a different team.

and restaurants are creating the space for wider creative economies with the capacity to attract further activity. Globally there is a close overlap with music, performing arts and literary cultures, especially as a result of common processes of digitisation which facilitate interaction and exchange. At the present time, this isn't fully in evidence in Pakistan. The art colleges are, however, producing internationally competitive talent.

The development of on-line retail in Pakistan will be a major opportunity. As Murtaza Zaidi, a digital entrepreneur and Chief Executive of the Islamabad chapter of The Indus Entrepreneurs (TIE) explained, one of the potentially most exciting developments would be on-line retail in high quality hand-made goods.

3.3.4 Sector-specific Challenges

Whilst there is a thriving commercial and independent gallery scene driven by individual initiative and passion, revenues are presently heavily dependent on a comparatively small urban clientele. Local networks of patrons, clients, galleries and artists are central. Artists themselves evidence a range of attitudes towards the economic viability of their creative activity. Second job-holding is common with no expectation that the creative work will be able to become a full-time activity. There is a strong aesthetic sensibility that places the contemporary artist at one remove from the market.

There is international interest in Pakistani contemporary visual art, and it is this interest that tends to validate the artist locally with artists not feeling recognised until this international validation is received. Private galleries are experimenting with on-line advertising to an international clientele, but without safe and secure means of payment, the growth of the market will be held back. Interviews with the gallery sector indicate that there is broad governmental understanding of the value of contemporary creative arts, but that bureaucracy, especially in the context of publicly administered festivals, is very difficult to work with. In the public gallery sector, there is a dearth of contemporary art curation, programming, modern cultural management and leadership, and audience development skill and experience. Innovation and development in curation is more likely to be evidenced in the commercial gallery sector. However, galleries are engaged in unacknowledged competition with each other which can only lead to attrition in the long term without measures to promote investment in audience development.

In their 2007 report UNIDO and UNESCO identified the following challenges for the Crafts sector in Pakistan: Informality in production and marketing; need to introduce innovation and new design; high levels of illiteracy and no links to training institutions; poor entrepreneurship; high dependency on intermediaries for purchasing of raw materials and marketing of end products; little knowledge of market and expansion possibilities; no linkages with tourism; poor access to working capital (purchase of raw materials). Our interviews confirmed much of this. However, it was also clearly apparent that there are growing signs of localised mutual support networks and systems among artists, some of which is a response to more centralised initiatives, some which is more autonomous. There is evidence that the One Product, One Village initiative has raised the value of collaboration and collective learning.

3.3.5 Sector-specific Actions

Contemporary Visual Arts:

1. Both the sector and public policy needs to better understand the specific ecology of the relationship between public investment in contemporary visual art and the independent and commercial sectors in order to design better public support.

AHAN (Aik Hunar Aik Nagar): Creating a Craft Value-chain

AHAN was launched in 2007 as a publicly assisted non-governmental organisation ultimately under the auspices of the Ministry of Industries and Production. Its aim is to promote non-agricultural economies and employment in rural areas through locally provided business support, enterprise training and an initial network of four urban retail centres. Activities address issues such as technology, access to finance, marketing, quality control and collaboration and cooperation. Following an initial mapping of Pakistan's crafts sector, up to 400 distinct clusters (based on 10 or more households in one village engaged in a particular craft) were identified across the country. Adopting the Japanese philosophy of One Product, One Village, AHAN adopts a multi-dimensional development strategy addressing economic, social, cultural and environmental dynamics of craft production, distribution and exchange. Following the success of the model, further companies have developed to support it such as the Sindh Indigenous and Traditional Crafts Company and the Indus Craft Foundation. In the first month that AHAN's retail outlet opened, it traded PKR1.5m and has continued to sell approximately PKR1m per month since. Makers are reimbursed market-price less 30%.

2. Develop contemporary approaches to management and leadership in the public gallery sector.
3. Introduce appropriate professional development and enterprise curricula into tertiary level education in the arts.
4. Showcase Pakistani contemporary visual arts internationally.
5. Develop an entrepreneurship development programme for the independent and commercial sectors.
6. Build on existing initiatives by better networking between public, private and voluntary craft development initiatives.
7. Develop an accessible resource of craft traditions, design styles and skills repositories to enable craft makers to both deepen their existing practice, and where appropriate diversify it through transferable skills initiatives. This needs to be done in conjunction with initiatives on national and provincial heritage.
8. Launch a professional development programme for craft industry intermediaries to better align their objectives with wider social, economic, environmental and cultural objectives of the craft sector.
9. Develop a national focus for the international branding, marketing and retail of high quality Pakistani crafts based on ethical trading principles.

3.4 BOOKS AND PRESS

3.4.1 Overview

The Books and Press sector includes: books, newspapers and magazines, other printed materials, libraries and book fairs.

3.4.2 Sector Profile

Although Pakistan has internationally high levels of illiteracy, the printed word in the form of books, newspapers and periodicals plays an important role in its civic and cultural life. Pakistan is historically a literary culture with poets and authors revered as national figures. News media played an important role in the foundation of Pakistan as a country and continues to be an important part of national life. As the growth of literary and literature festivals has shown, there is a demand for new writing, engagement with historical and classical texts and a desire to place Pakistan's literary culture at the heart of its wider public life. All forms of literary activity from books, to press, to internet publishing are important parts of the broader Pakistani public sphere. Literature and literary Festivals in Karachi, Lahore and Islamabad, which have grown rapidly in recent years, attest to the appeal of the literary form for Pakistani audiences and their desire to be both publicly engaged and heard. There is an independent literary scene with support organisations and periodicals, in both print and on-line media and supporting a linguistically diverse ecology of writing. Asif Farrukhi, the co-founder of the Karachi Literature Festival underlined the importance of linguistic diversity in both literature and society.

Book publishing in Pakistan mixes both academic works (monographs and text books) with fiction, historical publishing and poetry. There are important regional traditions of writing, some with long histories pre-dating Pakistan's foundation. Due to the high levels of illiteracy and comparatively low levels of literary achievement, publishing is a niche industry with a number of smaller markets. However, the growth of post-Independence education, both in the state and private sectors has driven up demand for text-books. Whilst early texts were imported, there has been a growth in Pakistani authors writing textbooks for a wide range of subjects and levels. International publishers such as Oxford University Press (OUP) have active commissioning and markets in Pakistan, and Pakistan itself acts as a base for OUP exports to the Middle East and North Africa. The Pakistan publishing industry went through something of a technological revolution in the 1970s and 1980s and there is engagement with new media marketing and distribution.

The Asian Media Barometer for Pakistan in 2012 (FES 2012) describes the important role of the press (and wider media) in being not just an observer of the challenging circumstances of Pakistani society but an active and vigorous panellist, creating space for scrutiny and challenge. This, however, comes at a price to some journalistic freedoms and at times, is directly challenged by extremism. Our interviewees, from across a number of Creative Industries sectors identified publishing and the press as an important space for free speech and expression. Recent legislative developments in 2012 provide some measure of guarantee in this context (qualified in various ways), but there are restrictions in other media access points. Youtube is still banned and Facebook was banned temporarily in 2010. A number of interviewees in the press, however, express the view that whilst freedom of speech and expression are essential, what is spoken or expressed is important. It was therefore vital, for a number of our interviewees, that the public space of the press engages Pakistanis in critical debate about the country's future and especially engages them with Pakistan's historic human values. As Afia Aslam, co-founder of the Desi Writers' Lounge and Papercuts explained, writing is perfectly situated to reflect on the "lived reality" of Pakistani society rather than on external stereotypes. However, the Pakistan Bureau of Statistics estimates that only 4% of the population have access to printed newspapers (PBS 2011)

Oxford University Press: Women in Creative Entrepreneurship

OUP Pakistan is the achievement of Ameena Saiyid and her team of authors, designers, illustrators and technicians. OUP Pakistan was launched in 1962 mainly selling imported books with a small representation of indigenous Pakistani authors. Ameena became its Chief Executive in 1988 and OUP Pakistan has grown to publish 250 titles in its current lists. Initially facing challenges in a male-dominated industry and wider business culture, Ameena used her combined energies and training to build OUP as a significant business presence in the Pakistani publishing industry. It specialises in a wide range of literatures including textbooks, academic monographs and general interest books. It has captured approximately 50% of the national private educational market in text-books. OUP Pakistan is an entrepreneurial business, sensitive to important local needs and demands, but aware of the global market and the need to be aware of and responsive to global publishing trends and their important regional effects. Building relationships with key customer groups has been central to OUP Pakistan's success, now with 24 nationwide book-stores and a mobile bookshop service. Ameena is also the co-founder of the Karachi Literature Festival that attracted 70,000 visitors over three days in 2013, attesting to the power and draw of literary culture. Ameena is very optimistic for the future of publishing in Pakistan:

"There is promise in the air for publishers in Pakistan. From children's books to academic, esoteric and research works, fiction, poetry, and informative writing in several languages, there is so much to publish. The future beckons!"

Ameena Saiyid

and that newspaper reading is under pressure from television, the growth of the internet and changes in the national culture of reading.

3.4.3 Opportunities

The full effects of new media are yet to be felt in publishing in Pakistan. Although the internet is important for publishers and press, the inherent restrictions on access to the internet, the high price of access to smart technologies (readers, smart phones, etc.) has the potential to restrict the market to traditional social elites with resources and the newly emerging urban middle-class with disposable income. However, there are initiatives to develop on-line book-selling at discounted prices such as Ajmal Kamal's Aaj and the Kitabain (www.kitabain.com) initiatives. The on-line press is also increasingly multilingual for example Jang at www.jang.com.pk. Some of the potential accessibility issues might be partly addressed once 3G and 4G platforms and smart technologies become more widely available. Technology, especially multi-platform technologies such as Apps and the Cloud and affordable portable readers, offer the potential to grow larger markets, but which at the moment are restricted to an early group of comparatively affluent experimenters.

Pakistan produces indigenous authors whose appeal and subject matter extends beyond national markets. The production of textbooks represents an expanding market and, as the incidence of piracy demonstrates there are markets for indigenous Pakistani literature.

As the festivals have demonstrated, with the right organisation the literature community can raise a single voice and change the perceptions of wider Pakistani society. As Razi Ahmed, co-founder of the Lahore Literary Festival explained: "Youth stakeholder engagement is critical." These various festivals represent one of the best opportunities to create positive change. Individually, they amplify the many genres and cultural benefits of literature in Pakistan; collectively they are clearly acting as a space for public debate, advocacy and change.

3.4.4 Sector-specific Challenges

While there is a broad based, active and diverse literature community in Pakistan, and which, as the Karachi, Lahore and Islamabad Festivals demonstrate, can be both engaging and vocal, the broader publishing sector has developed organically, in niches, closely entwined with education and subject to persistent problems of piracy which means that it is fragmented and constantly under pressure

Within the literature fraternity the individual language constituencies of Urdu, Punjabi, Sindhi and English tend to operate autonomously of each other, thus there are few opportunities for creative collaboration and the sector has little or no unified voice with policy makers. This may also account for the fact that, apart from the activities of academics, there is little real connection for the majority of Pakistanis between contemporary Pakistan and its proud literary heritage, except for a smaller urban elite educated in that heritage.

Interviewees regularly noted that whilst the festivals represent an important opportunity, there needs to be a stronger focus on educational curriculum at all levels. As with other creative and cultural sub sectors, literature has several important skills gaps worth noting, in particular scriptwriting, adaption and literary translation were particularly singled out. However, on the latter issue in particular, the British Council has been working with Oxford University Press and the Karachi Literature Festival to build capacity. These gaps also represent a challenge and opportunity for tertiary education, which many interviewees noted needs to expand the current more traditional curriculum, for one

Newsline: Independent Current Affairs, Markets and New Technology

Newsline is an independent monthly current affairs magazine launched by Razia Bhatti in 1989. Since 1996, Rehana Hakim, one of the journal's founding group has been its chief editor. It is the only journalist owned and managed current affairs publication in Pakistan. Covering national and international affairs, politics, social issues and culture, it launched an on-line presence ten years ago and eight years ago developed a documentary film-making unit that produces social interest/issues programmes for national television under its executive producer Tehmina Ahmed. Its print audience, however, is changing and Newsline is now considering where its market lies. Whilst Newsline has been able to attract important journalistic and technical talent, for many professionals it is a staging post to a career elsewhere, reflecting in many ways the nature of career patterns in the Creative Industries. As its original market demographic changes tastes, Newsline is importantly assessing its relationship to a younger audience and their tastes and expectations. Reflecting on these changes, Tehmina offers the view that a robust business plan is key to developing and maintaining independence.

The Desi Writers' Lounge and Papercuts

The Desi Writers' Lounge (DWL) was launched in 2005 by a group of aspiring writers from Pakistan to provide a mutual support system and platform for new South Asian writing in English. Centred on its online peer-review forum and its literary magazine – Papercuts – DWL has responded to a clear and growing demand for quality new writing that reflects the lived reality of Pakistanis and the global South Asian community. Papercuts magazine, in particular, offers neutral territory for young South Asian writers to converge, and provides an important counter-narrative to the international media stereotype of Pakistani society. DWL is a voluntary organisation: its members donate their time for free and they are active participants in Pakistan's growing literary festival scene. Such individual self-organising support systems are critical in the development of the Creative Industries, which flourish best in an atmosphere of collaboration and knowledge exchange.

that embraces the contemporary or vocational nature of practitioner's work. Globally, with the emergence of many young writers (for example, Nadeem Aslam, Kamila Shamsie, Mohammad Hanif, Mohsin Hamid), the literary capacity and international reputation of Pakistan is beginning to grow. The challenge is to ensure home grown talent is able to gain critical acclaim both in Pakistan and abroad. There is a growing demand for creative writing education and training which clearly represents an opportunity for higher education in particular.

Although Pakistan is a member of key international Intellectual Property Agreements, piracy is reported to be rife across all forms of literature with pre-release piracy and plagiarism common.

3.4.5 Sector-specific Actions

1. There needs to be university provision in publishing and supporting management and business skills.
2. An annual literature symposium to raise the debate at a policy level, provide a showcase and provide development opportunities.
3. Use the Literary Festivals, in combination with new technologies to promote engagement and re-engagement of Pakistanis in both their literary heritage and in contemporary public debate.
4. Implement obligations under international Intellectual Property Agreements and establish a campaign to raise awareness of Intellectual Property issues among professionals and readerships.

3.5
AUDIO-VISUAL AND INTERACTIVE MEDIA

3.5.1 Overview

The Audio Visual and Interactive Media industry sector is a complex and evolving mix of sub-sectors which include film and video production, television, radio, internet services, video games and online entertainment. While there are common threads running across many of these industries, for example, the use of software/ technology applications, content development, production and distribution channels, they tend largely to operate as autonomous sectors, with little strategic connectivity.

3.5.2 Sector Profile

The audio-visual and interactive media sector in Pakistan is a relatively new industry cluster, with film and television having a much deeper history, which is slowly realising its full economic potential and beginning to recognise what it sees as its main development challenges for the near and middle future. The sector is broadly split into web based interactive services and traditional broadcast media such as television and film, but within these classifications is a complex ecology of micro/small business activities which range from animation and gaming, through to live streaming and web-based television.

Spurred on by the evolution of a national internet infrastructure and growing access to mobile telephone devices, Pakistan has a growing group of young, creative, technically gifted and entrepreneurial people who understand that digital content production, regardless of which broadcast media it goes through, is a viable and expanding global market place, rich with commercial potential. The sector has a diverse mix of well-established, medium sized production and broadcast companies, small and agile growing enterprises; and new technology savvy micro-enterprises, many of which are formed out of university projects and other initiatives.

Many of these independent, digital producers have been trained abroad and are keen to bring these skills and their knowledge back to Pakistan in order to service the huge domestic market, but as many interviewees highlighted, they are also beginning to reach out and sell to international markets, as well as network with 'like minded' professionals on a global basis. Business development and planning is mainly learnt on the job, through trial and error ('DIY Style') and business models tend still to replicate those which already exist internationally. However, it may only be a matter of time before the audio-visual and interactive media community of Pakistan begins to evolve their own business models to suit local cultural demand and market opportunities.

As with other Creative Industries sub-sectors, they operate in a relatively autonomous environment, rarely linking up or formally collaborating with other creative disciplines for example, performing arts or literature.

From our interviews and field-work it would appear that this diverse and globally inter-dependent sector appears to be on the cusp of potential growth and the first cycle of strategic change and maturity. Growing competition, evolving skills requirements, access to funding, a shortage of culturally sensitive content, new business models, global market opportunities and technology infrastructural development are all drivers which imply that the era for the sector to shift from experimentation to professionalisation has now come. The growing confidence that this change will bring should be at the heart of what drives the successful exploitation of emerging opportunities. As Mira Hashmi at the Lahore School of Economics and an independent film-maker in her own right put it, the sector "is raring to go."

Interactive Media: Plan 9 Technology Incubator

Launched in 2012 'Plan 9' is a technology incubator based in Lahore and funded by the Punjab Regional Government via the Punjab Information Technology Board (PITB). It has been created to help develop sustainable economic growth by stimulating a culture of technology entrepreneurship. Plan 9 offers an incubation business environment which incorporates free office space, business mentoring, access to finance and monthly stipends. Plan 9 works in partnership with a range of national bodies e.g. the Pakistan Software House Association (P@SHA) as well as an international network of interactive media experts. Plan 9 supports a wide range of tech start up businesses working across a number of web-based, interactive media software applications and platforms. The current cohort includes digital applications which enhance telecommunications services, e-commerce trading and prosthetics. This initiative tries to provide solutions to several key sector challenges, such as access to investment and sector specific business information, while creating a space where the skills needs of industry are shared with those within education.

"Plan 9 is generating acceptability of entrepreneurship as a profession locally; we need creativity, self-reliance and belief to equilibrate the job market and thus, foster economic growth in Pakistan"

Nabeel A. Qadeer, Director Plan 9

3.5.3. Opportunities

In both domestic and international terms the audio-visual and interactive media industries of Pakistan have numerous opportunities they can exploit in the future. The sector as a whole has yet to create and communicate a clear brand proposition to domestic and international markets. This proposition must centre on quality, price, reliability and creativity, in particular developing content that is culturally relevant to an audience showing signs of changing taste. Beyond the national boundaries, India and the Pakistani international diaspora present obvious potential market opportunities worth more focused strategic attention. Film-makers especially were confident about being able to sell into India.

There are a range of 'digital' audience or user opportunities which present Pakistan with reliable, economic growth opportunities. These include growing internet usage (currently around 15% of the population), increasing adoption rates of social media (4% of the population are currently on Facebook and this is growing) and increasing the proportion of e-commerce sales which can be made by automatic payment.

With a fast growing young population, Pakistan will soon have a higher than average proportion of competitive digital creators and consumers. International content suppliers and service providers in particular will target the latter. Young people are at the heart of the global digital revolution and it is they who both innovate in this space and drive up the demand that will lead to future commercial value. The growing resource of indigenous digital creative talent could help Pakistan create a strong and sustainable industry, capable of generating high value jobs and thus reliable future tax revenues.

With international producers (India as a clear example) dominating the domestic market in both television and film distribution, there is an obvious opportunity for home grown talent to produce content that has a much stronger connection and value to the Pakistani audience. Our interviewees in both television and film sensed that this moment is now emerging.

Mobile devices present another significant opportunity for the growth and expansion of the audio-visual and interactive media industry sector. With global manufacturing led investment and innovation set to remain high, the imminent arrival of 3G and 4G and an already high rate of mobile penetration, Pakistan is well placed to exploit three significant growth drivers. When these factors are coupled to the growing younger population forecasts highlighted above, there is real scope for optimism in this area.

After substantial decline in the 1970's the Pakistan film industry is beginning build new momentum and across all our interviewees confidence was high that growth will continue. Investment in new cinemas is increasing (there are thought to be well over 100 cinemas now across the country) and following the box office successes of films such as 'Waar', 'Main Hoon Shahid Afridi' and 'Zinda Bhaag' it looks certain that the 20 new major releases produced in 2013 will be exceeded in 2014 and potentially more in years to come. This opportunity, driven by growing urban, younger audiences, lower production costs and an influx of new artistic talent is not without some challenges, but once again Pakistan's resilient film industry looks set to flourish, despite the lack of any formal national policy.

New and emerging business model changes, largely driven by evolving payment technologies, and advertising concepts present a real opportunity for film makers, television broadcasters and interactive media producers to expand their revenue potential. The ability to connect direct with the consumer, build stronger, longer lasting relationships and even personalise content will in

Lucid Studios: the Digital Economy and Skills

Established in Karachi in 2006 by the Founder and Director, Nadir Shah, Lucid Studios is a genuinely 'hybrid' media company, specialising in film production, visual effects/animation and content development. The business embarked on a journey of professionalisation which began with a deep passion for storytelling and a strong culture of artistic and technical innovation through the use of digital technologies. This has helped them create a strong and diverse portfolio of content across multiple platforms.

Lucid Studios content broadcasts across all forms of media and distribution channels, with an international portfolio of clients that includes Coca Cola, Konami and Unilever, along with domestic brands such as HBL. The company is ambitious but cites a shortage of talent with 'mid level' technical skills and access to investment as two significant barriers to growth.

"The ability to communicate in the English language is a critical skill in the global marketplace and institutions that cater to this need alone would have a massive ripple effect that would promote both stability and growth. Pakistan is the sixth most populous country in the world and we need institutions that are designed specifically to help Pakistan's young and talented workforce build their capability to contribute to the global marketplace.

"Our cinema industry needs to be promoted. Unlike India, the appetite of the Pakistani people for cinematic entertainment and its ancillaries has never been capitalised upon by investors. A revival of cinema in Pakistan has just begun, enabled in part by the democratisation of digital technologies of production and distribution. Pakistan cinema is finding its own identity with influences that range from genre entertainment in the West to the artistic traditions from the Middle East. This is a market of 190 million people and that isn't counting the Pakistani diaspora that's spread out across the world. It's an opportunity for investors and a way for Pakistan to engage in the global conversation."

Nadir Shah, CEO – Lucid Studios

time help the sector grow their markets and build new, profitable revenue streams. Multi-platform, multi-device access to content may also enable the growth of 'niche' content production and direct distribution.

3.5.4 Sector-specific Challenges

Despite clear sector strengths in technical software development and capabilities at a low and medium skills level and areas of quality in some content genres, the sector suffers from poor global visibility. This situation is in part a consequence of the broader external perception of Pakistan being seen as a less than favourable place to do business, but is also hampered by the fact that the many, flourishing export relationships which do exist, fail to highlight the role that Pakistani digital expertise has played. As Asif Iqbal of Ice Animations explained: Pakistan "tends to export the raw material rather than develop a brand." Too often, international business partners fail to acknowledge the Pakistani element of projects, possibly for fear of undermining client confidence on quality, when in reality there is a hidden story of reliability, competitive pricing, high quality development and good quality content or design. This brand challenge is therefore, weakening the substantial opportunities international markets present and indirectly, is possibly placing a ceiling on the prices that can be charged.

As with other sectors in the Cultural and Creative Industries we have examined, access to affordable, good quality business skills and knowledge, especially those that have a sector specialist emphasis, is all but non-existent. Digital entrepreneurs learn as they go, making mistakes and sometime costly deals which could have been avoided by access to appropriate business advice. Their ability to market themselves to both local and international clients also suffers as a result of a lack of access to contemporary communications skills. This situation is further hampered due to a real difficulty in accessing debt or equity finance; too often lenders are unable to quantify the investment potential of the sector as they have little or no knowledge of the business dynamics and full market opportunities, preferring too often to place money in more traditional industries or land and property. As one entrepreneur put it 'we need to bring the brains and the muscle together'. One way in which this is being realised is mini-ventures, a small-scale investment fund (www.miniventures.co). As Faizan Laghari, the Karachi Digital Entrepreneur explains: "A few months ago we started something called 'mini-ventures'. This is a personal side project through which I mentor and offer seed funding to young entrepreneurs – they don't get much – just 500,000 to 10,00000 rupees depending on the project – but at least it's something to get them started."

Our work found that within the film industry several specific challenges exist. Creatively, the industry has a shortage of writing talent, in particular this deficit is hampering the ability to exploit emerging audience demand for children and family entertainment. Structurally, the main concern by far appears to be the disproportionate degree of power distributors hold within the sector which means they are able to 'squeeze value' out of the industry and heavily influence what content is shown.

Another challenge faced by the digital sector is that of new talent, in particular the supply of high-level technical and creative content skills. Once again, there is a lag in perception that means that universities and private educational establishments are still keen to offer courses in traditional studies for example, commerce led topics such as accountancy and law. New digital skills such as coding, software design, visualisation applications and digital design are in evidence but there is a perception that the quality and the quantity is not yet at desirable levels. Of course, increasing the supply of new,

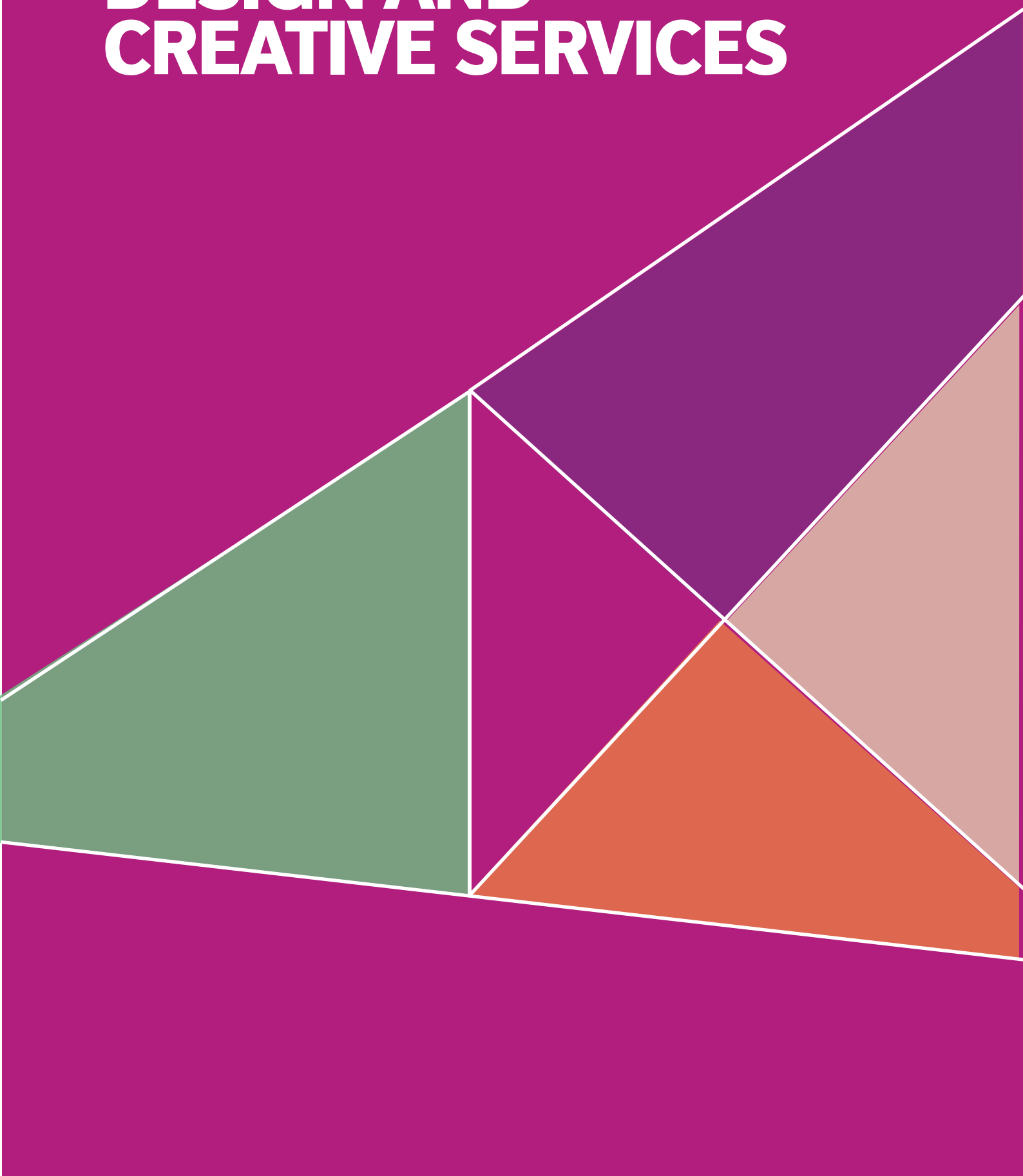
good quality, digitally enabled talent links to our final challenge, that of talent retention. There is a sense that the Pakistani digital industries are losing new, talented individuals to international markets. Better working conditions, greater job security, high wages and a safe social environment are all cited as reasons why people are tempted to leave.

Above all, as Salman Ansari, IT Consultant and former government advisor explained, the absence of a wider "public narrative" about the value and role of new technologies in Pakistani society could represent a significant barrier to full exploitation of their potential.

3.5.5 Sector-specific Actions

1. Examine the feasibility of developing a 'Digital Pakistan' brand and showcasing initiative incorporating such things as trade shows, web based directory, a brand identity and communications plan.
2. As part of a wider export strategy, look to target trading and collaboration opportunities with India and the wider global Pakistani diaspora.
3. Explore the feasibility of establishing a 'digital development bank' OR 'digital investment fund'. Ensuring the knowledge of the digital market ecology, dynamics and opportunities are married with funds, targeted at high growth potential individuals and enterprises.
4. Developing a vocationally based competencies skills framework for the digital industries which enables skills pathways to be developed which support career progression and inform curricula development.
5. Develop incentives and awareness programmes to stimulate the growth of courses in tertiary education.
6. Look at developing a progression programme in partnership with tertiary education which supports graduate 'self-employment', incubation, virtual business services and curriculum development.
7. Actions which help traditional industry sectors better understand the evolving opportunities which the audio-visual and interactive media sector bring to their performance and growth could strengthen the growth potential in home business to business markets.
8. Look at developing a long term strategic vision and plan for the whole Pakistani Film Industry, part of which would include the measures highlighted below.
9. Measures that help 're-balance' the distribution of film content, enabling diversity and helping to exploit the obvious potential of a growing domestic audience.
10. Creating the conditions and mechanisms by which investment in film can flourish i.e. subsidy, tax incentives, copyright protection.
11. Examining in more detail how the Pakistani and Indian film industries can collaborate more strategically.
12. Creating a national film archive, recognising the rich and diverse heritage of the Pakistani Film Industry, thus establishing a resource for research and learning.

3.6
DESIGN AND CREATIVE SERVICES



3.6.1 Overview

The Design and Creative Services sector includes: fashion design, graphic design, interior design, landscape design, architectural services and advertising services. In this section, we focus on fashion design, graphic design and advertising. Interior design, landscape design and architectural services are outside the scope of this study.

3.6.2 Sector Profile

The design and creative services sector industries are rooted in extensive and well-established creative and design traditions, and are enriched by the complex and diverse ethnic and provincial design heritage of Pakistan. Alongside this traditional design heritage exists a vibrant urban design scene, particularly in Karachi, and a growing contemporary interest in 'fusion' aesthetics. There is a strong and emerging sense of a new Pakistani design vernacular, which is about a blending of Pakistani and Western influences. Whilst there is still interest in and scope for traditional Pakistani design, the fashion design sector in particular is taking increasing influence from the West, aiming to create items with a broader appeal both domestically and potentially internationally. This interest in fusion design is present both in the demands of an emergent and affluent urban consumer market, and is influencing Pakistani design output across the design and creative services sector.

Entrepreneurship within the design and creative services sector tends to be heavily dependent upon the vision of an individual, with design entrepreneurs being the exception rather than the rule. It is not unusual for such visionaries to have been educated overseas, often in America. Entrepreneurs face certain barriers to international growth and expansion, which tends to be related more to the perceptions of Pakistan from the global market, than they do to the level of professionalisation, craftsmanship, aesthetic qualities and so on of their design output and creative services. Perception is perhaps less of an issue in advertising and graphic design, where, with less of an historic sense of a Pakistani aesthetic influencing the work, entrepreneurs are more able to work with international clients.

3.6.3. Opportunities

Broadly speaking, the sector has yet to articulate a concise brand proposition, either domestically or internationally. This is as a result of lack of connectivity within the sector between established companies, who could collectively, with support, raise Pakistan's profile. There exists the potential to raise the profile of the indigenous design talent within Pakistan, through a targeted, PR driven campaign about the benefits of working with Pakistani design companies. This proposition centres on the high quality design output and unique creative capacity of Pakistan, and works to alter perceptions for both short and long term gains.

The Pakistani diaspora provide access to a global market, and represent a huge commercial opportunity to the wider design and creative services sector, if further trade relationships are established and supported. The graphic design, advertising services and fashion design sectors already export overseas, but largely through organic, network-based and self-started models. As one fashion designer explained: "The reality is I have a relatively tight knit community of customers, therefore brand and word of mouth is key." With a coordinated plan that has a clear vision, targets of achievement (KPI's), investment forecasts and priority market insights, encased within an industry-led governance framework, these relationships may act as a significant catalyst for value creation and future investment.

3.6.4 Sector-specific Challenges

Whilst there is evidence of entrepreneurship within the fashion, advertising and graphic design sector, a tension exists between a traditional business culture that tends to value cash

Fusion Design: Tehreem Fatima, 'Stitched Stories'

After graduating from a textile design course, Tehreem started designing and manufacturing her own range of garments from home in 2011. Utilizing her design skills and bringing in help for the manufacture of more complex designs, 'Stitched Stories' intends to create a 'young, edgy, representational fusion of Ready to Wear Collections.' Whilst financial issues are slowing growth into the mass retail market, 'Stitched Stories' continues to operate successfully from its own factory, and is marketing itself via a very active presence on facebook. There is growing interest from around Pakistan in creating franchises, and with new more westernised designs starting to gain popularity, Tehreem is now looking to expand overseas. As she explains: *"Having initially started from home as a small family brand selling my own designs, we have now grown considerably. We have our own workshops, with 15 tailors, hand embroiderers, machine embroiderers and so on – we have expanded a lot since 2011. Now my designs sell on-line too, and we have people approaching us for franchises in new cities."* Tehreem Fatima

Adcom: Growth and Development in the Creative Industries

Under the leadership of Imran Syed, who joined his family business in 1997, Adcom has grown from 25 staff to 200 today, with offices in Lahore and Islamabad and a HQ in Karachi. Adcom, which is among Pakistan's largest advertising agencies, is also one of the most awarded creative agencies in Pakistan, and has a major blue-chip client book, with ongoing relationships with clients such as Telenor, Honda, Samsung and Engro Foods. The sustained growth has partly been due to television liberalisation and the expansion of channels, and has been dependent upon indigenous creative talent, of which there is no shortage, thanks to strong links with key arts and business colleges in Pakistan. Human resource management in the Pakistan creative sector is comparatively new and Adcom has consciously thought about how to attract, retain and develop creative talent. Changing technological opportunities are also impacting the nature of the work that Adcom undertakes. Social media is of growing importance and interest, and is being approached aggressively. According to Imran:
"Adcom today can rightly be gauged as an ever-evolving legacy of its founder, S.M. Akhlaq's idea of advertising; a method and a vision squarely based on fusing together cutting-edge communication ideas and tools with insights gained from the traditions and values that play an overwhelming role in the lifestyle of the common Pakistani." Imran Syed

in the hand business models rather than brand building. Particularly in Fashion, this is to the potential detriment of larger, more sustainable and longer-term returns associated with building and developing brands. As the fashion designer Mohsin Ali explained: "'we need to work as a collective and explain that fashion is not a joke."

There are examples of malpractice and deception across the sector, and a general culture of mistrust. The result is a tendency towards individualisation, and a winner takes all mentality, which is inimical to collaboration and the potential for knowledge transfer. This culture of mistrust means that career progression, particularly within Fashion, is highly dependent upon personal networks, and that both entering and sustaining a foothold on the market as a newcomer is problematic, resulting in high attrition rates. These career-inhibiting factors are exacerbated by the broader security situation, which undermines the quality of life for key staff, resulting in a 'brain drain' as key members, particularly within the advertising sector, take up positions elsewhere in the world.

Particular rigidities of the higher education sector, and a general sense that many universities seek to produce high volume rather high quality graduates is a risk to growth in the sector. With a few notable exceptions, for example, the Pakistan Institute of Fashion Design, HE in general is deemed to be operating too far from the demands or needs of the design and creative services industry, who express specific technical skill needs and requirements. However, there is an emergent culture of students re-tooling their educational experiences for contemporary creative purposes. As Amir Mirza of the Indus Valley Institute of Art and Architecture explained "young creative people are figuring it out for themselves." There is a need for closer relationships between HE institutions and the private sector, to ensure that good quality theoretical input is delivered alongside the practical, technical skills needed in the marketplace. Whilst there exists a strong and willing entrepreneurial culture amongst students, many of the rudimentary business and personal skills required are not present, and there is no clear strategy or framework for delivering them. However, Professor Hina Tayyaba, Vice-Chancellor of the Pakistan Institute of Fashion Design is adamant that with the right connection between higher education and the industry, creativity "can play a role in social responsibility by developing social capital."

3.6.5. Sector-specific Actions

1. Explore the feasibility of establishing a 'design services development fund'. This is about targeted funding for individuals or companies with high growth potential and a proven track record for having the products, knowledge and expertise necessary for expansion.
2. Establish a framework for a placement-based education programme whereby students experience the benefits of working for established brands for a fixed period, through which some of the sectorial needs and entrepreneurial skills can be developed.
3. As part of a broader support mechanism and strategy for export, look to target opportunities for trade and collaboration further afield, particularly in high potential but currently dormant markets such as in India and the wider Pakistani diaspora.
4. Create a 'Pakistani Design Awards' to help build domestic networks, provide exposure to emerging talent, recognition for established talent, and to provide a focus point for 'Brand Pakistan' for external markets.

Zahir Rahimtoola – 'Labels'

An hotelier by training, Zahir moved into textiles in the early 1990's when the Pakistani textile industry was just emerging. On opening one of the first textile buying houses in the country, which ultimately came to represent major American importers and retailers, Zahir's knowledge of the broader fashion sector grew, as did the business' resources. The first real opportunity for expansion came in 1996 when the only outlets for Western influenced clothing were small flee markets, despite a rising consumer demand. Labels emerged onto a non-existent fashion scene and pioneered casual western clothing in Pakistan. Now a large and growing fashion retail outlet operating in three cities, Labels was originally the converted reception area of Zahir's office space. Despite these humble beginnings, Zahir has always had a strong vision for the brand:

'Pakistan has evolved, its society has evolved, but most importantly its women have evolved. Long gone are the days when a woman was content with just her home and family. The new era brings forth a woman who wants it all; home, family and a successful career. Fashion awareness has also spread vastly amongst the society. Women not only want to take over the world but want to look good doing it.'

'Labels', the first fashion outlet store in Pakistan, quickly started taking on its own designers, and so evolved from an outlet store model into a fashion brand. Labels has always been proactive, and, since its inception, has evolved a number of times keeping in line with ongoing international fashion design trends. Most recently, Labels has moved into e-commerce, and in doing so, has become the first comprehensive e-commerce fashion portal in Pakistan.

CHAPTER 4
CONCLUSIONS

It is impossible to escape the all-pervading security situation in Pakistan. However, to allow those exacting conditions to define Pakistan would be iniquitous and unrepresentative of the lived experience of Pakistani society. Pakistan's creative and cultural industries can be characterised by vitality, freshness, originality and a personality which is simultaneously steeped in tradition and heritage, blended with a keen awareness of global cultural and business trends. Pakistan's creative and cultural industries possess strengths in creativity, respect for tradition, openness, innovation and the capacity to mobilise these entrepreneurially for the benefit of society and economy.

Whilst technology does and will in the future make a major contribution to Pakistan's creative life, its tangible and intangible cultural resources will continue to play a major role in Pakistan's economic and social future. The creative and cultural industries are especially suited to the challenges of promoting an international profile, and, embedding sustainable economic activity into localities and provinces.

The energy for the development of Pakistan's creative and cultural industries comes from its people, its citizens and their roles as workers, practitioners, professionals and entrepreneurs. However, the last few years have evidenced what can be achieved when this energy is supported by public initiative. A variety of Pakistani national and provincial initiatives, together with donor and NGO activity, have all raised the profile for the Cultural and Creative Industries and illustrated the case for including them in public policy. Crafts in particular have been routinely targeted by a number of national and provincial initiatives and there is good acknowledgement of their potential to contribute to the development of sustainable local economies. There is evidence of growing interaction between craft-makers that will encourage innovation, new markets and raise quality aspirations.

Social enterprise is playing an important role connecting Pakistani citizens to their cultural heritage, contemporary creative expression and employment and business opportunities. Supported by government initiative, social enterprises promoting the work of craft-makers are significant, but private initiative in the social enterprise sphere is also increasing in presence and profile in areas such as literature, music and performance.

The Cultural and Creative Industries are offering women opportunity for both economic advancement and a wider public and civic role. Many areas of crafts are dominated by women workers and, as both public and private initiatives take effect to raise skills, develop new markets and promote enterprise, the economic position of women workers has the potential to see improvement. Women play leading roles across the urban Cultural and Creative Industries. Highly visible in areas such as film, television, performance and literature, for example, they are, however, less visible in areas such as design and new media. Women, in particular, play important leadership roles in the social enterprise areas of the Cultural and Creative Industries.

The Cultural and Creative Industries are growing in the major urban centres. Influenced by both traditional artistic endeavours in literature, music, performance and

visual art, a new generation of creative entrepreneurs are emerging in film, television, new media, creative services and design. Whilst there are developing platforms for interaction and collaboration, more work is needed to encourage them to look towards greater collaboration, knowledge exchange and interaction. However, these new entrepreneurs are typically outward looking and interested in drawing on a range of international business models and cultural influences and it may just be a matter of time before greater collaboration happens naturally.

The development of Pakistan's Cultural and Creative Industries is fuelled by some important underlying strength in creative skills. Interviewees in the film, television, new media and design sector especially speak highly of the international competitiveness of some key areas. There are, however also important gaps, particularly in enterprise skills, arts and cultural management, and some at-risk areas in specialised crafts. There is growing evidence of increasing creative literacy skills as the overall level of literacy in society more generally improves. Pakistan's diverse literary and linguistic heritage is contemporary and dynamic. However, overall, there is an important and urgent need to examine the contemporary and future relevance of current higher education curriculum.

Whilst activity on the ground is vigorous and dynamic, the Cultural and Creative Industries do not, as yet, possess a coherent image and profile within society more generally and policy in particular. The absence of consistent and detailed data, comparable with international standards, will continue to hamper the development towards visibility and identity. The presence of high profile public champions would help to mitigate some of this and this might be a key priority in the short term, especially in terms of the Cultural and Creative Industries being able to communicate with and articulate the case to public policy. Data is important, but of equal importance are; the story which such data is used to tell, and, who tells it?

Within public policy itself, there needs to be a campaign of awareness-raising based on the achievements to date and the evidence of future potential. The evidence suggests that there is the potential for growth, combined with an important role in both rural and urban economic sustainability. This does, however, need to be explored further with the relevant national and provincial authorities, Cultural and Creative Industries stakeholders (public, private and third sector), and private sector bodies such as the Chambers of Commerce, and, educational and research institutions.

Pakistan's international image continues to be a potential challenge for international trade and collaboration. The routine non-acknowledgement of Pakistani creative product in international markets inhibits both the recognition of Pakistani brands and value streams, which in turn undermines goodwill and sustainability. This could, in part, be overcome by a strong international public relations campaign around the quality and reliability of Pakistani originated product, particularly in the design and digital areas. This would also help to raise the issue of endemic counterfeiting of creative product in Pakistan. Intellectual property, as well as more generic legal and regulatory issues are routinely cited as daily issues by Pakistan's cultural and creative entrepreneurs and practitioners.

Pakistan enjoys an emergent Creative Industries sector founded on a combination of a rich and diverse cultural heritage, and an engagement with contemporary cultural and creative expression. The challenges, political, economic, cultural and ideological presented by Pakistan's unique geo-political significance should not be under-estimated. However, as our interviewees related, to only see Pakistan through that lens both under-estimated and misrepresented the lived reality of modern Pakistan, representative of which are its Cultural and Creative Industries.

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APPENDIX 1

LIST OF INTERVIEWEES AND TABLE PARTICIPANTS

Shakeel Abro *Regional Co-ordinator Sindh AHAN, Ministry of Industries & Production, Government of Pakistan*
Furqaan Afzal *Faculty, Fashion Details/Fashion Design, Pakistan Institute of Fashion Design*
Razi Ahmed *Founder and Chief Executive Officer, Lahore Literary Festival*
Zain Ahmed *Artistic Director, National Academy of Performing Arts*
Swaleha Alam Shahzada *Executive Director, The Citizens Archive of Pakistan*
Murtaza Ali *Independent Filmmaker*
Mohsin Ali I*ndependent Fashion Designer*
Anisa Ahmed *Independent Fashion Designer*
Tehmina Ahmed *Co-founder and Senior Editor, Newsline*
Mobeen Ansari *Independent Photographer*
Salman Ansari *CEO and Chairman, Salman Ansari Technology Consultants (Pvt.) Ltd*
Afia Aslam *Co-founder, Desi Writers' Lounge and Papercuts Magazine*
Sadaf Aziz *Independent Sculptor*
Noorjehan Bilgrami *Textile Designer and Founder, Koel*
Shajahan Chaudhary *CEO, Teamants Social Media Agency*
Shariq Chhapra *Principal Eyecue Production and Design*
Ejaz Durrani *Former film actor, producer and director*
Asif Farrukhi *Co-founder, Karachi Literature Festival*
Tehreem Fatima *Textile Designer and Owner Stitched Stories*
Hira Gardezi *Interior Design Consultant, HB Furniture*
Madeeha Gauhar *Activist, Artistic Director and Founder, Ajoka Theatre*
Zulfiqar Ghazi *Craft Maker, Lok Virsa*
Nudrat Gilani *Principal, Pakistan Institute of Fashion Design, Islamabad Campus*
Sajjad Gul *CEO, Evernew Group*
Riaz Gul *Faculty, Department of Film and TV National College of Arts*
Haji Habeeb-ur-Rehman *Independent Truck Artist*
Seema Hameed *Independent Film Producer*
Hameed Haroon *Chief Executive Officer, Dawn Group*
Mira Hashmi *Assistant Professor, Centre for Media Studies, Lahore School of Economics*
Asif Iqbal *Chief Executive, Ice Animations*
Farhana Iqbal *Advisor, Social Sector Federation of Pakistan Chambers of Commerce and Industry*
Faizan Islam *Manager Sales & Marketing wCube Marketing*
Nusrat Jamil *Director, Latitude (SMC -Pvt) Ltd and Chairperson, Advisory Committee, Lahore Literary Festival*
Ajmal Kamal *Founder, Aaj: Independent Urdu Language Literary Journal*
Nina Kashif *Production Head, MD Productions*
Osama Khalid *Plan9 - PITB's Tech Incubator*
Ali Raza Khan *Chief Executive Officer, Youth Engagement Service*

Maheen Khan *Fashion Designer and Owner, The Embroidery House, Maheen and Gulabo Former and Chairperson, Fashion Pakistan Council*
Majid Saeed Khan *Head of Department, Deptartment of Film and TV Production, National College of Arts*
Sarmad Sultan Khoosat *Independent Filmmaker, Actor, Writer*
Nida Khurram *Independent Fashion Designer and Former HOD Fashion Design, Asian Institute of Fashion Design*
Mukesh Kumar *Manager, Sindh Small and Medium-Sized Enterprise Development Agency*
Faizan Laghari *Plan 9, Punjab Information Technology Board*
Sabeen Mahmud *Founder and Director, PeaceNiche*
Nasir Malik *Filmmaker, Founder Retired, TV, Education, Art, Entrepreneur*
Dr Allah Bakhsh Malik. *Head, Literacy and Non Formal Basic Education Department National and Punjab Governments*
Amir Mirza *Faculty, Design Karachi University.*
Mashood Ahmad Mirza *Director, General Pakistan National Council of Arts*
Adil Moosajee *Owner, Ego*
Faizan Mubarak *Associate Director Brand and Strategy, Geo Entertainment, Independent Media Corporation (Pvt) Ltd*
Saleem Mughal *Media Consultant, ZoomIn Communications*
Prof. Saleema Mughal *Federation of Pakistan Chambers of Commerce and Industry*
Farjad Nabi *Filmmaker, Matteela Films Pvt Ltd*
Kishwar Naheed *Founder, Hawwa and Member National Committee on the Status of Women*
Munib Nawaz *Fashion Designer and Owner, Munib Nawaz*
Ayesha Noorani *Principal Architect, Noorani Associates and Founder, Daachi Foundation*
Adnan Pardesy *Fashion Designer and Owner, Adnan Pardesy*
Alena Peerzada *Director Programmes and Operations, Rafi Peer Theatre Workshop*
Saadaan Peerzada *Chief Operating Officer, Rafi Peer Theatre Workshop*
Usmaan Peerzada *Chief Executive Officer, Rafi Peer Theatre Workshop*
Nabeel A Qadeer *Chief Executive, Plan 9 Punjab Information Technology Board*
Zahir Rahimtoola *Chief Executive Officer, Labels*
Sameera Raja *Founder and Owner, Canvas Gallery*
Shanaz Ramzi *General Manager Public Relations & Publications, HUM Network Ltd*
Ayla Raza *General Secretary, All Pakistan Music Conference*
Jamshed Raza (Jami) *Film Director and Founder, Azad Film Company*
Muslim Raza *Provisional Chief, Sindh Small and Medium-Sized Enterprise Development Agency*
Umer Rehman *Assistant Professor, Department of Apparel Design, Indus Valley School of Art and Architecture*
Muhammad Reza *Chief Operating Officer, Ramsha Technologies*
Shama Saeed *Director CSR, Federation of Pakistan Chambers of Commerce and Industry*
Ameena Saiyid *Managing Director, Oxford Univeristy Press and Founder, Karachi Literature Festival*
Dr. Shahida Saleem *Chair, Federation of Pakistan Chambers of Commerce and Industry*
Nadir Shah *Director and Founder, Lucid Studios*
Muhammad Siddique Sheikh *Chairman, Standing Committee on R & D, Federation of Pakistan Chambers of Commerce and Industry*
Imran Syed *Chief Executive Officer, Adcom*
Prof Hina Tayyaba *Vice Chancellor, Pakistan Institute of Fashion Design, Lahore Campus*
Anwaar Ul Haq *Deputy Director Lok Virsa*
Murtaza Zaidi *Chief Executive Officer, Cybervision*
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Rubina Zulfiqar *Craft Maker, Lok Virsa*

APPENDIX 2

Table 1: Creative Goods: Export and Import Values

Territory	Year							Growth 2003-2008 (%)
	2002	2003	2004	2005	2006	2007	2008	
World	204,948	233,400	269,331	298,549	324,407	370,298	406,992	11.53
Developing	75,835	91,124	109,267	125,321	136,100	156,043	176,211	13.55
Transition	1,210	1,392	1,920	2,206	2,413	2,741	3,678	18.76
Developing Economies South Asia	250	6,605	8,838	10,247	11,720	11,531	11,161	10.69
Pakistan	-	1,059	1,013	1,495	1,434	1,282	1,349	5.50
% Developing	-	1.16	0.93	1.19	1.05	0.82	0.77	
% Developing South Asia	-	16.03	11.46	14.59	12.24	11.12	12.09	
World	225,590	250,160	284,624	317,175	337,506	402,452	420,783	11.15
Developing	36,692	41,842	50,492	62,090	65,426	88,370	93,721	17.90
Transition	1,728	2,448	3,391	4,110	5,178	7,274	10,003	31.40
Developing Economies South Asia	431	2,160	2,553	3,212	3,517	3,918	3,482	11.35
Pakistan	-	171	139	216	285	292	314	17.18
% Developing	-	0.41	0.28	0.35	0.44	0.33	0.34	
% Developing South Asia	-	7.92	5.44	6.72	8.10	7.45	9.02	

Source: UNCTAD calculations based on United Nations Comtrade database data. Notes: exports f.o.b.; Imports c.i.f. (UNCTAD 2010)

Table 2: Creative Services: Export and Import Values

	Territory	Year						
		2002	2003	2004	2005	2006	2007	2008
Exports ($m)	**All reporting countries**	62,227	72,308	86,031	99,235	147,736	164,158	185,087
	Developing	7,860	8,185	9,363	12,771	17,133	18,835	21,182
	Transition	1,910	2,803	3,483	4,467	5,385	7,279	10,491
	Pakistan	**25**	**35**	**38**	**75**	**121**	**66**	**89**
	% Developing	**0.32**	**0.43**	**0.41**	**0.59**	**0.71**	**0.35**	**0.42**
Imports ($m)	**All reporting countries**	72,334	76,066	82,774	92,609	122,714	154,387	168,669
	Developing	9,484	10,487	8,513	10,175	16,574	21,107	23,447
	Transition	3,773	3,230	4,651	5,291	6,036	8,503	11,179
	Pakistan	**71**	**55**	**23**	**51**	**38**	**68**	**91**
	% Developing	**0.75**	**0.52**	**0.27**	**0.50**	**0.23**	**0.32**	**0.39**

Source: UNCTAD secretariat calculations based on IMF Balance of Payments Statistics (UNCTAD 2010)

Table 3: Creative Related Industries: Exports and Imports

	Territory	Year							Growth 2003-2008 (%)
		2002	2003	2004	2005	2006	2007	2008	
Exports	World	375,845	442,610	558,225	637,446	709,923	711,244	727,116	9.94
	Developing	134,982	185,605	256,206	305,502	336,889	384,238	399,588	15.84
	Transition	1,043	1,729	2,257	2,453	2,965	2,891	3,256	12.42
	Developing Economies South Asia	317	9,477	9,838	13,271	11,929	15,003	16,612	12.00
	Pakistan	-	16	52	90	110	101	89	36.16
	% Developing	**-**	**0.01**	**0.02**	**0.03**	**0.03**	**0.03**	**0.02**	
	% Developing South Asia	**-**	**0.17**	**0.53**	**0.68**	**0.92**	**0.67**	**0.54**	
Imports	**World**	**399,738**	**464,050**	**574,898**	**650,448**	**700,896**	**717,956**	**738,569**	**9.15**
	Developing	84,002	111,394	148,359	188,327	202,224	222,417	235,918	15.48
	Transition	2,330	3,302	4,764	7,672	12,150	16,141	19,692	45.18
	Developing Economies South Asia	423	12,544	17,863	26,059	24,851	27,824	26,674	15.54
	Pakistan	-	346	523	1,636	2,202	1,930	937	30.00
	% Developing	**-**	**0.31**	**0.35**	**0.87**	**1.09**	**0.87**	**0.40**	
	% Developing South Asia	**-**	**2.76**	**2.93**	**6.28**	**8.86**	**6.94**	**3.51**	

Source: UNCTAD secretariat calculations based on United Nations Comtrade database data (UNCTAD 2010)

Table 4: Creative Goods, South Asia Developing Economies, Exports and Imports

	Territory	**Year**							**Growth 2003-2008**
		2002	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	
Exports ($m)	Developing S Asia	250	6,605	8,838	10,247	11,720	11,531	11,161	10.69
	Bangladesh	56	60	126	139	145	180	-	-
	India	-	4,444	6,746	7,630	9,125	9,907	9,450	15.70
	Pakistan	**-**	**1,059**	**1,013**	**1,495**	**1,434**	**1,282**	**1,349**	**5.50**
	Sri Lanka	194	179	179	162	171	162	179	-0.66
Imports ($m)	Developing S Asia	431	2,160	2,553	3,212	3,517	3,918	3,482	11.35
	Bangladesh	229	270	348	369	265	332	-	-
	India	-	1,313	1,621	2,016	2,548	2,913	2,273	14.50
	Pakistan	**-**	**171**	**139**	**216**	**285**	**292**	**314**	**17.18**
	Sri Lanka	202	241	266	323	339	348	359	8.50

Source: UNCTAD secretariat calculations based on United Nations Comtrade database data. Notes: exports f.o.b.; Imports c.i.f. (UNCTAD 2010)

Table 5: Creative Services, South Asia Developing Economies, Exports and Imports

	Territory	Year						
		2002	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
Exports ($m)	Bangladesh	13	21	19	19	22	72	58
	India	-	-	1,108	3,345	5,445	5,591	4,894
	Pakistan	**25**	**35**	**38**	**75**	**121**	**66**	**89**
	Sri Lanka	na	na	na	na	na	na	na
Imports ($m)	Bangladesh	29	37	40	69	88	79	75
	India	-	-	1,194	2,013	3,443	5,572	5,434
	Pakistan	**71**	**55**	**23**	**51**	**38**	**68**	**91**
	Sri Lanka	na	na	na	na	na	na	na

Source: UNCTAD calculations based on IMF Balance of Payments Statistics (UNCTAD 2010)