

POLICY BRIEF

RESEARCH, EVALUATION, MONITORING UNIT (REMU)

CULTURAL AND CREATIVE INDUSTRIES IN PAKISTAN

DRIVING CULTURE AND COMMERCE

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Driving Culture and Commerce

Summary

This policy brief is based on the research *Culture and Creative Industries in Pakistan (2014)*, which was undertaken by the British Council and the University of Leeds, United Kingdom. The policy brief provides information and recommendations for practitioners, administrators, and policymakers to enable cultural, social and economic development in Pakistan through the country's cultural and creative industries. This brief: (1) outlines the status and context related to cultural and creative industries in Pakistan; (2) examines the challenges and opportunities these face in the country; and (3) proposes recommendations that can help make them effective contributors to national cultural, social and economic development.

Introduction

Pakistan's cultural and creative industries are 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. Pakistan's cultural and creative industries are a key source of cultural and commercial life in the country. People in both urban and rural areas earn their livelihoods in the country's cultural and creative economies. The cultural and creative industries also affirm cultural identity in the country, projecting not only a multifaceted international image of a vibrant Pakistan, but also defining cultural life around rural heritage and folk traditions as well as urban subcultures.

Despite their importance and impact on the country, cultural and creative industries face a range of challenges that need to be urgently addressed. Available evidence suggests that while Pakistan is a net exporter of cultural and creative products and services, its share of the total value of creative exports from developing countries has declined between 2003 and 2008. As the value of exports from developing countries grew at an average annual rate of nearly 10 per cent, the growth rate for Pakistan has been approximately 5 per cent per annum. Moreover, the cultural and creative industries have little or no visibility in Pakistan's current policies for education, skills, trade, clustering, supply chains, enterprise and finance.

Challenges and Opportunities

Employment

As many as 15 per cent of all employees in Pakistan, in both urban and rural areas, earn their livelihoods in the country's cultural and creative economies. Crucially, women are increasingly represented in this workforce. There are indications that their employment is growing in the audio-visual and interactive media and design and creative services sectors, which are, in the main, urban in location. Despite offering considerable employment, the jobs in these industries are not reliable. People find work in the visual arts, performing arts, literature and music, but this work is not regular and forces people to typically work in other sectors as well. Moreover, there are often no recognisable ways to enter and develop a career in the cultural and creative industries. People, in both villages and the cities, often start their careers through family networks. Those without prior family experience often face resistance by family when it comes to ambitions to work in the cultural and creative Industries.

Capacity

As evidenced by its international output, Pakistan features strong technical skills in audio-visual media, interactive media design, animation, film and television, photography, festivals and events staging. There are, however, important gaps. Professionalised arts and cultural management skills face skills shortages, including in finance, fund-raising and investment skills; networking and communications; marketing and customer relations; and audience development.

Similarly, creative skills such as scriptwriting and screenplay writing, film and television making, and audio-visual and interactive media are still in short supply. While there are good models of higher and vocational education emerging in some areas of creative skills – especially in crafts, performance, fashion design and visual arts – quality higher education and training remains limited in scale, particularly for lower income candidates.

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Recognition

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. However, this public recognition does not yet extend to the broader cultural and creative industries. In fact, the role of Pakistani cultural and creative talent is often downplayed due to the fear of unsettling international clients.

Business Environment

Whilst there are some emergent platforms for collaboration and mutual support, organisations and individuals across the cultural and creative industries tend to work in relative isolation. Their 'voice' is fragmented in a range of ways: socially, generationally, sectorally and geographically. Collaboration and interaction are largely hesitant and pragmatic, rather than seen as opportunities to be developed. Similarly, there are few instances of collaboration with the wider Pakistani settler communities in other countries. This lack of collaboration can be attributed to a lack of trust, poor business practices and dealings, intellectual property theft and unreliability in financial matters. Much of this reflected in the wider economic conditions in Pakistan as well, where corruption, tax evasion, business illegitimacy and lack of financial transparency encourage circumspection and wariness. Notwithstanding this, there are some good examples of collaboration and the mobilisation of networks in Pakistan, such as the literature festivals in Karachi and Lahore, which draw on a wide range of international, national and provincial contributors.

Entrepreneurship

There is a strong entrepreneurial culture within the cultural and creative Industries of Pakistan. A strong sense of vision, determination, resilience and tenacity typically feature among Pakistani cultural and creative entrepreneurs. But these entrepreneurs are unable to fulfil their aspirations because of skill gaps or the fragmented business environment described above. 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.

Finance and Growth

Pakistan's national banking, investment and financial sectors are largely unaware of the cultural and creative industries. Private sector investors, however, are increasingly 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.

Recommendations

A host of actions in strategy, policy and the investment need to be made in the country that will enable cultural and creative industries to contribute to the cultural, social and economic development of Pakistan.

Leadership, Networking and Visibility

To give themselves leadership and visibility within Pakistan and also internationally, the cultural and creative industries should organise into a cogent agency such as a 'Cultural and Creative Industries Leadership Forum and Network'. This should be developed in conjunction with the Federation Of Pakistan Chambers Of Commerce and Industry (FPCCI) and the Small and Medium Enterprise Development Authority (SMEDA). As platform for collective action, this forum and network will enable the cultural and creative industries to work closely with government institutions and international donors and influence public policy, and higher education. It will also help showcase and promote the Pakistani cultural and creative brand. The forum and network can do this by specifically partnering with SMEDA, the Ministry of Commerce and Pakistan's export support structures.

The 'Cultural and Creative Industries Leadership Forum and Network' 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 challenges and opportunities highlighted above.

Capacity Building

In order to overcome skill gaps and shortages, 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. Likewise, the government should 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.

Entrepreneurship and Innovation

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. 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.

Finance and Investment

Public funds and initiatives for enterprise and exports should also include and benefit cultural and creative industries. 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 cultural and 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.

Conclusion

The cultural and creative industries are here to stay in Pakistan. If these steps are taken to improve the position of cultural and creative industries within the country, they would boost economic growth; diversify opportunities for employment; and create greater creativity and human capital. Most importantly, the cultural and creative industries would reaffirm Pakistan's cultural identity as inclusive, vibrant, and exciting.