

# Cultural and creative industries: Roadmap to expanding Pakistani exports to Africa

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## Abstract

Although Cultural and Creative Industries (CCIs) are increasingly becoming engines of sustainable economic growth and national image building globally, in case of Pakistan, their vast potential remains relatively untapped. This paper outlines the role of culture as a strategic sector to boost economic growth, sustainable development, and cultural diplomacy. Drawing on an extensive literature, interviews, and focus group discussions, the paper maps the general trends in Pakistan's CCI trade performance to propose policy measures that can promote CCIs for Pakistan's socioeconomic development generally and its engagement with Africa particularly. The study explores the role that CCIs play in sustainable development; how Pakistan's CCIs can be deployed for economic growth and cultural diplomacy; what specific sectors of CCI represent maximum potential for economic cooperation between Pakistan and Africa; and what policy frameworks can be developed for them. The study argues that Pakistan's socioeconomic challenges require a strategic approach to devising national and foreign cultural policies that foster healthy avenues of social engagement, an inclusive national identity, economic growth, and international diplomacy. While the paper is focused on addressing a significant gap in the government's "Look Africa Policy" that does not factor in the immense potential of CCIs, its findings and recommendations are applicable to Pakistan's national and foreign cultural policy in general. Finally, the research makes a contribution to the sparse literature on CCIs in Pakistan.

**Keywords:** Creative industries, creative economy, Pakistan, Africa

## Introduction

In today's globalized world, the significance of culture for sustainable development, social innovation, and economic growth cannot be overemphasized. Indeed, the creative economy is one of the most rapidly expanding sectors of the global economy, with global trade in creative products more than doubling between 2002 and 2015 (KuKu et al., 2018).

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Located at the intersection of economics, innovation, social value, and sustainability, the creative economy has at its core Cultural and Creative Industries (CCIs) that include visual arts and crafts, performing arts, media, advertising, design, books and press, sports and recreation, tourism, and cultural and natural heritage. CCIs help generate jobs, revenues and taxes, export earnings, and competitiveness. With an annual global worth of \$2.25 trillion, CCIs account for over 3% of the global GDP and employ 30 million people (UNESCO, 2017). This outdoes the global revenue of telecom services (\$1.57 trillion) or India's GDP (\$1.9 trillion) and represents more job production than the car industries of Europe, Japan, and the US combined. These trends, however, are unevenly distributed across the world. While Asia-Pacific, Europe and North America have documented tremendous growth (93% of the global CCIs revenue and 85% of jobs), Africa, the Middle East, Latin America, and the Caribbean have not yet capitalized on their potential (EY, 2015).

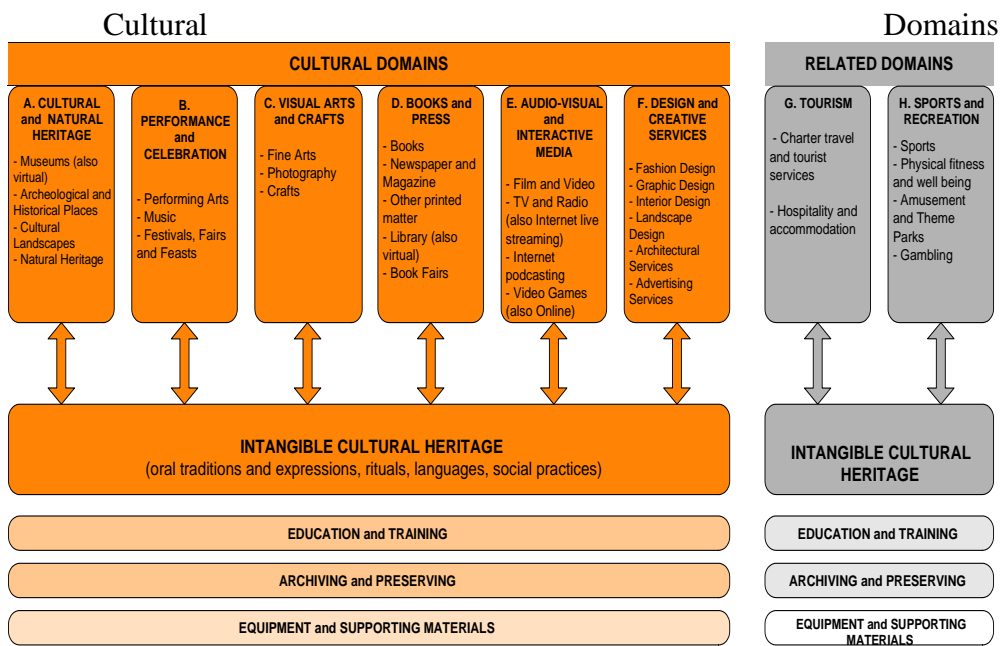
Since 2004, the United Nations has consistently highlighted the role of CCIs in sustainable development especially for the low- and middle-income countries. While the UNESCO 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions provided a framework for the development of CCIs, UNESCO Culture for Development Indicators and Creative Economy Report and UNCTAD's Creative Economy Program helped monitor the implementation of the Convention. Indeed, the 74th session of the UN General Assembly declared 2021 as the "International Year of Creative Economy for Sustainable Development". However, Pakistan is among a handful of countries that has still not ratified the 2005 Convention. Indeed, CCIs represent an estimated \$1.5 billion untapped potential of the Pakistani economy (Rafi, 2014). In 2017 Pakistan launched its "Look Africa Policy Initiative" that was extended in 2019 with the "Engage Africa Policy" to enhance economic ties with Africa; however, the policy, does not factor in the vast potential of CCIs. This paper, therefore, foregrounds culture as a strategic sector to foster Pak-Africa trade and diplomacy vis-à-vis their shared challenges. While this policy paper is focused specifically on addressing a significant gap in the "Look Africa Policy", its findings and recommendations are applicable to Pakistan's CCIs in general as the study contributes to the very limited literature on CCIs in Pakistan.

## **What are Cultural and Creative Industries?**

While the term “cultural industries” was coined by Adorno and Horkheimer in 1948 to critique commercial entertainment produced under industrial capitalism, it has evolved dramatically over the subsequent decades. Modern use of the term can be traced to the British Labour Government’s 1997 initiative to develop “an innovation and technology-based economic model” through “IP-based, culturally-rooted businesses” (Trembath & Fielding, 2020, p. 24). Labour Government set up a Creative Industries Task Force as part of the Department of Culture, Media and Sport (DCMS) to map the economic contribution of the creative sectors for policy feedback. This mapping document became the steppingstone for an international policy discourse on CCIs (Flew, 2012). The document defined CCIs as “activities which have their origin in individual creativity, skill and talent and which have the potential for wealth and job creation through the generation and exploitation of intellectual property” (DCMS, 2001, p. 5). Although the UK, Australia, and the EU have used varied terms and definitions vis-à-vis their development needs and cultural strengths, all definitions converge on the central ideas of creativity, innovation, and intellectual property as means to socioeconomic welfare.

*CCI Domains:* Creative economy is a subsection of the overall economy while CCIs are a subgroup of the creative economy (Trembath & Fielding, 2021). The UN divides CCIs into 6 primary and 2 related domains (Fig. 1).

**Figure 1**

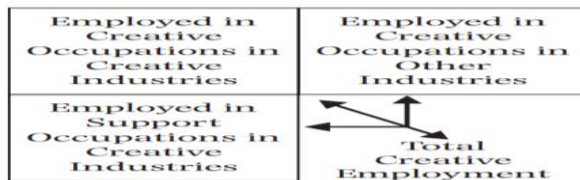


*Note:* From *The 2009 UNESCO framework for cultural statistics*, by Pessoa & Deloumeaux, ©2009 United Nations. Reprinted with the permission of the United Nations.

*Workforce:* CCI's workforce includes three categories: specialist creatives; embedded creatives; and support professionals (Fig 2).

**Figure 2**

*The Creative Trident*

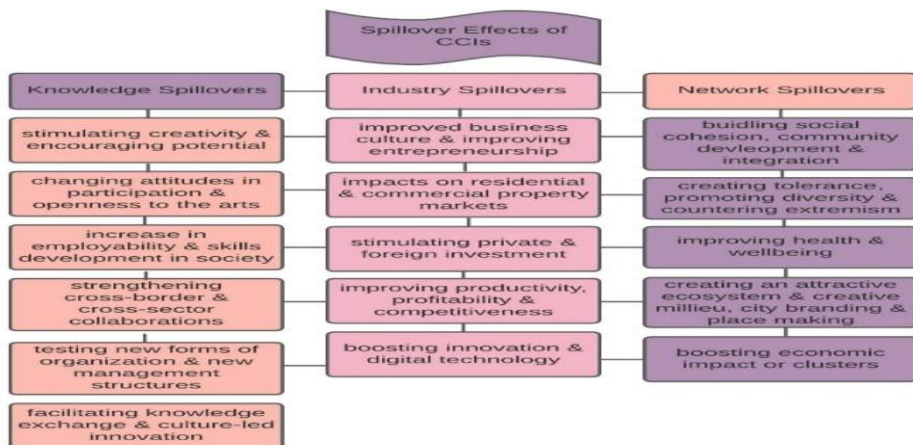


*Note:* “Creative Industries Mapping”, by Higgs & Cunningham, 2008, *Creative Industries Journal*, 1:1(7–30). Copyright Higgs & Cunningham 2008.

*Economic Impact:* The total economic impact of CCIs is divided into (i) direct impacts reflected in the income directly produced or consumed by CCIs and (ii) indirect impacts or “spillover effects” on the rest of the economic system (Figure 3).

**Figure 3**

*Spillover Effects of CCIs*



*Note:* “Research Case Studies 2016-2017,” by The European Research Partnership on cultural and creative spillovers, 2017, p. 5. Copyright CSS 2017.

*Funding:* CCIs have four revenue sources: earned income; government funding; private sector support; and other sources.

### Significance of Study

Given the global economic challenges especially in the aftermath of the Covid-19 pandemic, we need “new approaches of inclusive growth” that can account for “limited natural resources” and “protection of bio diversity”. This calls for “new patterns of production and consumption based on the smart use of IT, biotech and nanotechnologies”. Indeed, in a post-industrial service economy, economic development is grounded in innovation, technology, and creativity (Moore, 2014, p. 738-9), which is evident in the unprecedented growth of CCIs in recent decades. A study comparing the total impact of CCIs on per capita income in 78 developed and developing countries in 5 continents,

275 European regions, and 518 municipalities showed that the average effects of CCIs are positive and economically significant in both low- and high-income locations across geographic scales (Domènech et al., 2021). Hence, this study identifies two main components of the potential of CCIs for Pakistan: a source of sustainable economic development that can increase Pakistan's foreign reserves and a cultural diplomacy resource to project the country's soft image globally.

### **Conceptual Framework**

The study of foreign policy traditionally focused on security and economic affairs until Joseph Nye's concept of "soft power" redefined the field in the post-Cold War era. Nye defines "soft" or "co-optive" power as "the ability of a country to structure a situation so that other countries develop preferences or define their interests in ways consistent with its own". While hard power has to do with "*ordering* others to do what [one] wants," soft power allows a "country [to] get other countries to want what it wants." The latter, for Nye, is "associated with intangible power resources such as culture, ideology, and institutions." Indeed, "[i]f a state can make its power seem legitimate in the eyes of others, it will encounter less resistance to its wishes. If its culture and ideology are attractive, others will more willingly follow" (166-168). Thus, over the past few decades, cultural policy has come to be regarded as the "third pillar" of foreign policy alongside security and economic concerns (Martins, 2005).

However, Liland (1993) notes that despite the increasing acknowledgement of culture in foreign policy, little is done to incorporate it given scholars' inability to "see" the "link" between culture and foreign policy. Liland proposes three theoretical approaches to understanding this link. The "perspective approach" views "culture as a foundation of foreign policy" in that the foreign policy establishment operates within the cultural framework of a society. The "incremental approach" views culture as "a part of foreign policy", for the implementation of cultural policy is assigned to the foreign policy establishment. Both approaches render culture secondary to "foreign policy proper", focused on political, economic and security issues. The "extra-dimensional" approach, however, views culture "as a foreign policy resource of its own". This approach analyzes culture as "an additional aspect to the traditional power resources" of the political, security and economic approaches. The extra-dimensional approach postulates "interchange between societies" and "people-people contacts" aided by trade,

tourism, immigration, and audio-visual and interactive media (Liland, p. 7-22). This study situates CCIs within the extra-dimensional approach to foreign policy.

Potts and Cunningham (2010) propose four models of the relationship between CCIs and the economy (i. welfare, ii. competition, iii. growth, iv. innovation) with each requiring a respective policy framework. The welfare model presumes CCIs to “consume more resources than they produce” becoming “a net drain on the economy” whose effect is nevertheless “welfare positive”. Policy intervention for this model focuses on “income and resource reallocation or price maintenance” to protect a “valuable asset” against threats from market economy. The competition model views CCIs as “just another industry” change in whose size or value has a neutral effect on the economy, thus requiring “no special policy treatment”. The growth model directly links growth in CCIs to the aggregate economy, thus requiring “special” policy measures to power growth in other sectors. Evidence for this model comes from the generation of jobs; commodities; services; and new technologies, industries, and markets. Finally, the innovation model views CCIs less as an industry and more “as an element of the innovation system of the economy” that creates “change in the knowledge base of the economy”, and, therefore, has crucial policy significance. The evidence for this “evolutionary model” comes from the creation of new industries (Potts and Cunningham, p. 165-171). This study makes a case for the growth model of CCIs based on evidence from international CCIs performance and proposes a similar path for Pakistan.

### **Research Questions**

1. What role do CCIs play in sustainable economic growth and development?
2. How can Pakistan’s CCIs be deployed for sustainable development and cultural diplomacy?
3. What specific sectors of CCI represent maximum potential for Pak-Africa collaboration?

### **Methodology**

Given the wide scope of the creative economy, this research was projected to identify, for an in-depth study, three specific sectors of CCIs with maximum potential for Pak-Africa collaboration with a specific focus on the top three African economies in the “Look Africa Policy” (South Africa,

Kenya, Nigeria) that also represent the most thriving CCIs in Africa (Hruby, 2018). However, the orientation of the research shifted in view of the initial finding that CCIs are a misunderstood and unregulated arena in Pakistan. Indeed, Pakistan does not have a CCIs policy, and local and national culture policy documents reflect a limited, if any, engagement with CCIs. Therefore, this paper begins with a general overview of the creative sector in Pakistan; it goes on to map the general trends in Pakistan's global CCI trade performance; and, finally, it reviews Pak-Africa CCI trade to identify areas of intervention for enhancing Pak-Africa collaboration.

Given their usefulness in cultural studies (Cunningham & Flew, 2019, p. 61), the research used qualitative methods to gather data in two phases: a desk-based literature and statistical review and fieldwork consisting of interviews and focus group discussions. Literature review drew on books, newspaper reports, op-eds, and research articles on national and foreign culture policies and CCIs of developed and developing countries; key international policy documents, case studies, and reports on cultural policies; qualitative and quantitative data from UNESCO, UNCTAD, and the Ministries of Foreign Affairs, Commerce, and NHCD. Generally, both literature and statistical data on CCIs in Pakistan are sparse and incomplete. Although this research consulted Pakistan Bureau of Statistics; Pakistan Economic Survey; and Ministry of Commerce Trade Statistics, none of these sources had adequate data to enable an accurate mapping of the cultural sectors' performance, especially in the services domain. Therefore, major data sources for this study were the UNCTAD, UNESCO, WIPO, and the British Council reports. In the second phase, fieldwork was carried out consisting of interviews and focus group discussions with academic experts on Africa and cultural studies, practitioners, policy makers, public and private sector organizations personnel, and diplomatic representatives. Semi-structured interviews with 10 open-ended questions were designed as they provide in-depth information on specific topics while also providing latitude in focusing on important aspects or offering new directions (Galletta, 2013; Brinkmann, 2014; Currie, 2005). Interview data was studied using a thematic analysis drawing on the 6-step framework by Braun and Clarke (2006). Patterns of themes were identified which were then linked with the desk review data to arrive at findings and conclusions.



## Literature Review

### CCIs in the International Context

One of the first creative industries policy, the UK's DCMS aligned "British creativity" with "intellectual capital" to foster economic growth (Flew, 2012, p. 11). While the 1998 DCMS Mapping Document cited the CCIs to be worth 5% of national income, the 2001 Document recorded an 87.5% revenue increase. As of 2018, Britain's creative sector was growing more than five times faster than the national economy worth £224.1 billion (Trembath & Fielding, 2020). Australia's first official cultural policy *Creative Nation* (1994) also reflected a shift towards art as a commercial project that was pledged a \$252 million funding (Hawkings, 2014), and broadened the definition of culture to include new media. As of 2020, Australia's creative economy contributed A\$111.7 billion and employed 868,098 people besides having reshaped Australian national identity as multicultural. The EU represents another CCI success story based in robust policymaking. The EU's Culture 2000 program, Creative Europe 2011-2027, and other initiatives invested billions of Euros into the cultural sector. Today, CCIs in the EU employ 8.3 million people and generate €558 billion (Dronyuk et al., 2019).

Developing Asian economies have likewise increased their "stake in the culture-economy nexus" with active policy making (Lim & Lee, 2020, p. 1). South Korea, for instance, set off with dedicating 1% of its annual budget to supporting CCIs in the 1990s (Flew, 2012, p. 44). In 2019, the Korean Wave (Hallyu) contributed \$12.3 billion to the economy besides having augmented South Korea's global influence. China is home to the world's largest CCIs given Chinese government's significant measures to deploy the sector for economic growth and soft power (Trembath & Fielding, 2020). In 2015, China recorded the world's highest creative trade surplus (\$154 billion), surpassing the US fourfold. Besides, Hong Kong, Japan, India, Singapore, Taiwan, Turkey, Thailand, Malaysia, Mexico and Philippines are the top ten developing CCI economies (KuKu et al., 2018). Unfortunately, however, Pakistan, is, not part of this emerging success story of Asian CCIs. Lim and Lee's (2019) handbook reviews case studies from over 13 developed and developing Asian economies, without making a single reference to Pakistan, not least because the country has neither ratified the UNESCO 2005 Convention nor formulated a CCI policy.

Indeed, even “national” cultural policy is an underdeveloped area in Pakistan given the historical deployment of religion as a counterforce to the subcontinent’s pluralistic cultural heritage. Ethnic diversity and multiculturalism have been perceived as threats to national integrity as opposed to being deployed as sources of an inclusive identity and global diplomacy. Indeed, education and curriculum in Pakistan need to move beyond a clichéd understanding of culture as a fixed set of values to the modern notion of culture as a complex set of intersecting subcultures in a multicultural, interdependent world. Examples of how social and cultural values can be deployed for progressive enterprises despite being grounded in religion and history are available in the CCI trajectories of Turkey, Indonesia, and Malaysia that are among the rising Asian CCI economies. Finally, with some exceptions, a major chunk of cultural activities in Pakistan are of non-commercial value. The commercialization of culture requires a reconception of the latter in education, academia, and popular imagination. This can particularly be achieved through a serious investment in cultural policies.

### **Pakistan’s CCI Landscape**

There is very limited literature available on Pakistan’s CCIs. Academic and research studies on the developing CCI economies do not figure Pakistan (Flew, 2012; Hartley et al., 2015; Comunian & Gilmore, 2016; Lim & Lee (2019). *Pakistan Institute of Development Economics* has recently started a webinar series on creative industries and there are occasional articles on the cultural sector (Samad et al., 2018; Ali & Zulfiqar, 2020). However, by and large, the only major works on Pakistani CCIs are UNESCO publications and the British Council Report (Taylor et al., 2014). As per the latter, CCIs in Pakistan contribute to employment both urban and rural, and reflect a growing skills base in audio-visual media, interactive media design, animation, film and TV, photography, and festivals (p. 4-5). However, Pakistan does not “possess an international brand identity or profile for its creative products and services” especially in new media. Likewise, CCI business environment is compromised by “poor...practices and dealings, intellectual property theft and unreliability in financial matters”, which owe to “wider economic conditions where corruption, tax evasion, business illegitimacy and lack of financial transparency encourage circumspection” (Taylor et al., p. 5-6). Finally, there is lack of awareness regarding CCIs on part of the national banking system, investment and financial sectors, and public policymakers. While this study

extends the report's findings vis-à-vis the new data available, it provides specific recommendations for Pak-Africa collaboration.

### **Pakistan-Africa Relations**

Pakistan's relations with African countries can be traced back to their independence movements. Pakistan's support of the anti-apartheid movement in South Africa was acknowledged by Nelson Mandela's state visit to Pakistan in 1993. In 1986, Pakistan established its Specialized Technical Assistance Programme that has been providing military and diplomatic training to African officers. Currently, Pakistan has resident missions in 16 African countries; however, Pakistan's trade relations with Africa are not very strong while cultural engagement is almost entirely ignored. While Pakistan's trade with Africa remained stagnant at around \$3 billion from 2012-2017, the \$1.6 billion increase it recorded in 2018-2019 dropped again by \$0.42 billion in 2019-2020. Goods exports to Africa include cereals, cotton, textile products, sugar, and paper while services exports include government and business, transportation, travel, telecommunication, and ICT. Top export destinations are Kenya, South Africa, Madagascar, Tanzania, Egypt, Nigeria, Mozambique, Swaziland, Libya, and Mauritius. Although Pakistani export destinations continue to grow, its share in total trade of African countries remains 0.4%. This low trade volume reflects Pakistan's limited exploration of avenues of trade, which has allowed the African continent to be dominated by China (\$90 billion) and India (\$30 billion) given their active presence and robust marketing. Indeed: "[I]ack of information, mutual understandings, business interactions, connectivity and people to people contact between Pakistan and African countries are the ground of the low economic relations" ("Pakistan-Africa Bilateral Trade", 2020).

In 2017 Pakistan launched its "Look Africa Policy Initiative" that focused on enhancing political, diplomatic, and economic ties with the top 10 African economies. The policy was extended in 2019 with the "Engage Africa" initiative as part of which an envoys' conference was jointly organized by the Ministries of Foreign Affairs and Commerce in November 2019 in Islamabad that emphasized the need for high-level civil, military, and diplomatic dialogue. This was followed by the participation of a Pakistani delegation at the first Pakistan-Africa Trade Development Conference (2020) in Nairobi. Other initiatives include upgrading 2 and opening 5 new embassies in African countries in 2020; meetings between Pakistani and African heads of state; Pakistan's delegation to the 47th session of the OIC CFM in Niger in

November 2020; visit of the African Union’s parliamentary delegation to Pakistan in December 2020 (Altaf, 2022, p. 1-2); opening of trade wings in Algeria, Egypt, Ethiopia, Sudan and Tanzania (Khan, 2021); and Pakistani Foreign Minister’s visit to Egypt in 2021. These initiatives bore fruit in the form of a 7% growth in Pak-Africa trade despite Covid-19 restrictions; however, the progress has been slow especially in the cultural domain (Altaf, 2022, p. 1-2) that is overlooked in the “Look Africa” and “Engage Africa” initiatives.

Africa, frequently called “the continent of the future” is the second-largest continent with an estimated 1.37 billion population. The continent boasts “promising economic potential, lucrative investment opportunities, abundant natural resources and...high percentage of youth population” (Khan, 2021). Africa shares with Pakistan its history of colonization, postcolonial instability, and multiple security challenges. To achieve self-sufficiency, postcolonial nations must tap into their cultural heritage as means to foster growth and development. However, despite the “cultural revolution” that Africa is experiencing, like Pakistan, its nascent CCIs contribute less than 1% to the GDP and require robust legislation and investment. Secondly, amid the forceful narrative building that characterizes current geopolitical reality, Pakistan is faced with a stronger pressure to assert itself. As key drivers of cultural diplomacy, CCIs can project Pakistan’s soft image across the African continent. Likewise, Africa can deploy cultural sectors to “foster collective security and prosperity” (Africa Creative Industries Summit, 2021). This research addresses these gaps through providing policy recommendations that can enhance Pak-Africa CCI collaboration.

## **Analysis**

### **Pakistan’s Cultural and Creative Industries**

Given Pakistan’s rich and diverse cultural heritage, its growing young population, and its expanding tech ecosystem, the future of CCIs in Pakistan looks promising, however, only if it is harnessed by a targeted CCI policy. While there is a federally administered NHCD, cultural sectors are provincial domain. Nevertheless, there is limited national and provincial investment in arts and culture, and the bulk of contribution comes from private investors, philanthropists, and international donors. Besides, institutions lack awareness regarding the financial investment requirements or potential of CCIs. Pakistan’s CCI skills base is also patchy; audio-visual media, design, film,

television, photography, animation, festivals, and event management are areas of strength whereas human resources, finance, investment, communications, and public diplomacy pose challenges. Current skills development also owes mainly to interventions by international organizations (UNESCO, Goethe Institute, the British Council), international exchange and scholarships programs (Taylor et al., 2014).

Physical infrastructure of the cultural sectors (theatres, museums, galleries, art institutes etc.) also requires expansion. For instance, over the last 10 years, the number of cinemas in Pakistan has declined by over 64%; while in 2008-9 Pakistan had 203 cinemas, in 2018-19 they were reduced to a meagre 72 with Punjab having a bulk of that and Sindh and Balochistan following with 12 and 1 respectively while Khyber Pakhtunkhwa had no operational cinemas. NHCD website lists 27 museums and 9 art galleries in Pakistan; however, they need investment and rehabilitation. Although there has been a gradual increase in the number of visitors to archaeological museums between 2015-2020, the total number as of December 2019 is a meagre 271340 (2966 being foreigners) with 142066 in Islamabad, 83101 in Punjab, 39289 in Sindh, 6814 in KP, and 70 in Balochistan. Heritage sites fare better with a total of 485983 visitors in December 2019; however, foreign visitors made only 1365 of these (PBS, n.p.). This reflects the need that key informants emphasized recurrently for the rehabilitation of and investment in heritage sites.

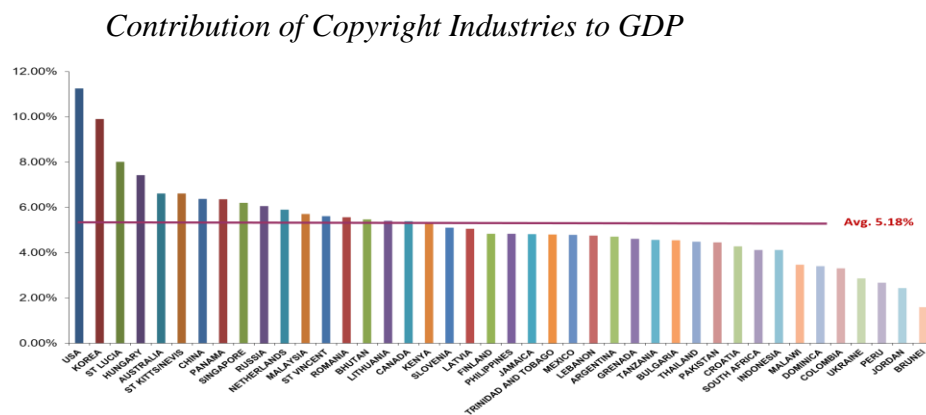
In the domain of digital and technological infrastructure (television, communication devices, technical equipment, broadband etc.), Pakistan fares better. There has been a proliferation of private TV networks since 2000, resulting in a dramatic rise in the production of content both at home and abroad. As per the Ministry of Planning *Annual Plan (2020-2021)*, there are 7 state TV Stations, 110 TV Transmitters, 88 Satellite Channels, 4060 cable TV licenses, 144 million total TV viewership, and 96 million Total Cable & Satellite viewership. As per the PSLM Survey (2021), 98% urban households in Pakistan have mobile phones and about 45% individuals own them. Number of cellular phone subscribers with active SIMs reached 182 million at the end of March 2021 while broadband subscribers reached 100 million. The total broadband access stood at 47.6% in March 2021 posting an increase of 19.7% as compared to 2020. 12% of the population have access to a computer, laptop, and/or tablet; however, these numbers are expected to rise significantly. Interviewees repeatedly underscored the need to harness this technological

upsurge for CCIs through developing a market for cultural goods and services in the digital environment.

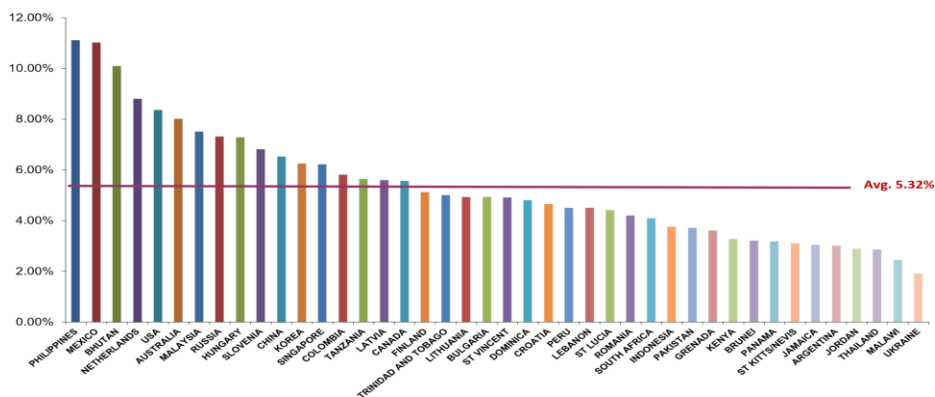
### Contribution of Copyright Industries to National GDP and Employment

As per WIPO (2014) that collected data from 42 countries up until December 2013, the average contribution of Copyright Industries to National GDP and National employment are 5.18% and 5.32% respectively. Pakistan stands below average on both with its share of 4.5% and 3.7% (Fig. 4 and 5).

**Figure 4**



Note: *WIPO Studies on the Economic Contribution of the Copyright Industries*, by WIPO, 2014, p. 3. Copyright WIPO 2014.

**Figure 5***Contribution of Copyright Industries to National Employment*

Note: *WIPO Studies on the Economic Contribution of the Copyright Industries*, by WIPO, 2014, p. 4. Copyright WIPO 2014.

WIPO divides copyright industries into 4 groups: core, interdependent, partial, and non-dedicated support industries. Generally, more than half of the total contribution of the copyright industries to GDP and employment comes from the core copyright industries. Pakistan's performance in the sector is once again far below the average in both the GDP and employment shares (2.77%) at 1.4% and 0.7% respectively. Interdependent stands at 0.1% and 0.0%; Partial at 1% and 1.4%; and nondedicated at 2% and 1.6%.

### **International Trade Performance in CCIs**

As per KuKu et al. (2018), world creative goods exports more than doubled over a 13-year period, from \$208 billion in 2002 to \$509 in 2015. Developing economies surpass the developed in both increase and value, posting a staggering \$265,081 billion in 2015 up from \$84,365 in 2002. Likewise, developing Asian economies contribute 52% of CCI exports worldwide. Pakistan is generally missing in this picture except figuring in the top 10 exporters of Art Crafts from developing economies with a market share of 0.4% in 2015 (Table 1).

**Table 1**

## Top 10 Art Crafts Exporters among Developing Economies 2015

	Value (in millions of \$)	Market share (%)	Annual Growth (%)2003-2015	Avg. rate
<b>China</b>	17.383	48.7		12.9
<b>Turkey</b>	2.754	7.7		13.58
<b>Hong Kong (China)</b>	1.759	4.9		-4.32
<b>India</b>	1.592	4.5		6.31
<b>Mexico</b>	222	0.6		-3.09
<b>Taiwan, Province of China</b>	1.063	3.0		4.05
<b>Pakistan</b>	138	0.4		-11.07
<b>Saudi Arabia</b>	102	0.3		-0.02
<b>El Salvador</b>	70	0.2		32.08
<b>Brazil</b>	67	0.2		-1.21

*Note: Creative economy outlook, by Kuku et al., ©2018. Reprinted with the permission of the United Nations.*

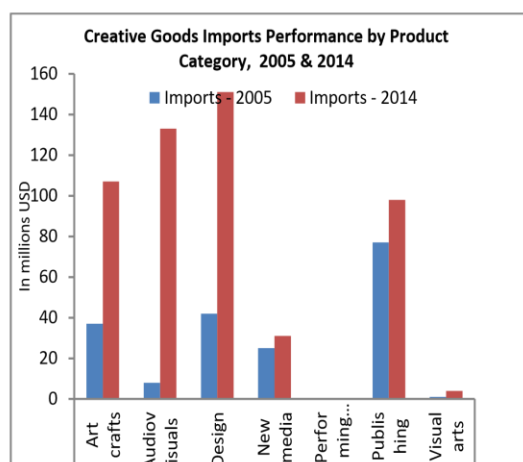
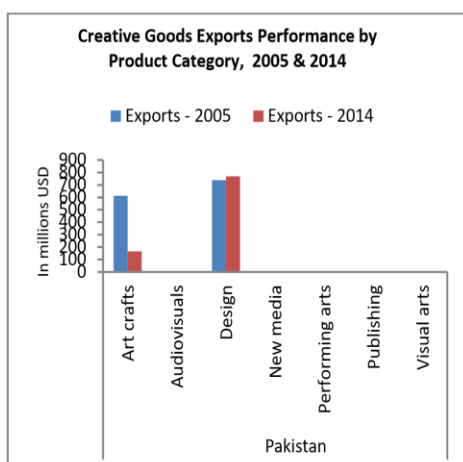
However, despite being among the top ten Art Crafts exporters, Pakistan's share has declined with an annual average growth rate in the negative (-11.07%). Design reflected the largest share of exports, also posting an increase. In the remaining sectors (Visual Arts, Publishing and Printed Media) China, followed by Hong Kong, India, and Singapore dominate. Indeed, as opposed to these upward trends, Pakistan's creative goods trade



performance has declined over the same period. Exports dipped from \$1.363,11 in 2005 to \$940,59 million in 2014 while imports increased from \$189,96 to \$525,48 million, bringing the trade balance down to \$415 million compared to \$1.173,25 in 2005 (Fig. 6).

**Figure 6**

*Pakistan's Creative Economy Trade Performance (2005-2014)*



*Note: Creative economy outlook, by Kuku et al., ©2018. Reprinted with the permission of the United Nations.*

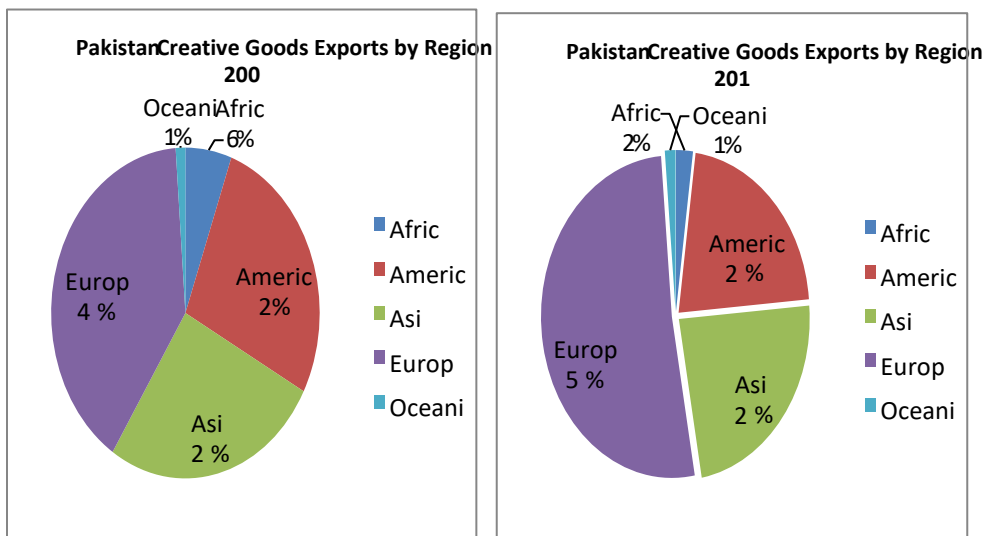
As for specific sectors, Design made the largest share with fashion goods and jewelry exports at \$652 and \$106 million respectively; Art crafts

was next at over \$100 million; carpet exports stood at \$123. Pakistan's handmade carpet industry that has its roots in the 11th century and employs around 1 million people has been on the decline facing challenges ranging from production to market access (KuKu et al., 2018). Carpet "export value declined by more than 50% from \$278 million in 2005-06 to \$98m in 2015-16". The Ministry of Commerce replaced machine-made carpets in the FTA concession list with handmade carpets; while the latter take 6-12 months to make, they have high demand in the international market as opposed to the former (Khan, 2016, p. 51). Finally, while Design and Arts crafts posted an increase, audiovisuals, new media, performing arts, publishing, and visual arts did not.

While Pakistan has performed modestly over this 9-year period, its engagement with Africa has been worse. Pakistan's creative goods exports by region has remained almost static: except for a 10% difference in exports to Europe, America and Asia posted similar figures (Figure 7). The main markets for exports are Europe (51%), Asia (24%) and the Americas (22%) while top ten export partners are US, Germany, UAE, UK, France, Spain, Netherlands, Canada, Belgium, and Sweden. Except for Sweden and Germany, Pakistan's exports to all 10 countries have declined (Table 1). In case of Africa, exports not only reflect the lowest figure, they have also declined from 6% in 2005 to 2% in 2014. South Africa was the only country among top ten trade partners in 2005, but it does not figure in 2014. (KuKu et al., 2018).

**Figure 7**

*Pakistan-Creative Goods Exports by Region (2005=2014)*



*Note: Creative economy outlook, by Kuku et al., ©2018. Reprinted with the permission of the United Nations.*

**Table 2***Pakistan's Top 10 Export Partners for Creative Goods (2005-2014)*

TOP 10 EXPORT PARTNERS FOR CREATIVE GOODS, 2005 AND 2014								
2005					2014			
Economy	Values in Million US \$				Values in Million US \$			
Ranking	Partner	Exports	Imports	Balance	Partner	Exports	Imports	Balance
1	United States	340,57	15,01	325,57	United States	163,92	55,40	108,52
2	United Arab Emirates	184,40	14,17	170,23	Germany	160,14	3,79	156,35
3	Germany	105,81	14,73	91,09	United Arab Emirates	128,46	10,41	118,06
4	United Kingdom	95,65	12,33	83,32	United Kingdom	53,84	21,67	32,17
5	Saudi Arabia	68,64	4,88	63,76	France	51,67	1,68	50,00
6	France	64,31	2,99	61,31	Spain	47,39	1,10	46,29
7	Spain	60,01	1,50	58,50	Netherlands	39,01	6,56	32,45
8	South Africa	57,35	0,33	57,02	Canada	29,23	8,06	21,17
9	Italy	51,03	0,78	50,24	Belgium	26,87	0,35	26,52
10	Belgium	33,59	0,87	32,72	Sweden	26,73	45,87	-19,14

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As for the creative services exports, Pakistan posted \$390 million in 2014 compared to \$201 in 2010, reflecting a big increase (Table 3). However, most of this came from telecommunications, computer, and information that added \$379 million. Interestingly, Pakistan has not posted any creative services exports in personal, cultural, and recreational services; audiovisual and related services; and the use of intellectual property (KuKu et al., 2018). This reflects significant potential for Pak-Africa trade.

**Table 3**

Pakistan's Creative Services Exports and Imports (2005-2014)

PAKISTAN	Values in Million US \$				
	2010	2011	2012	2013	2014
<b>EXPORTS</b>	201,0	244,0	274,0	312,0	390,0
<b>Charges for the use of intellectual property n.i.e</b>					
<b>Other business Services</b>	8,0	4,0	7,0	4,0	11,0
Research and development (R&D)	8,0	4,0	7,0	4,0	11,0
<b>Personal, cultural and recreational services</b>			1,0		
Audiovisual and related services			1,0		
<b>Telecommunications, computer, and information services</b>	193,0	240,0	266,0	308,0	379,0
Computer services	193,0	240,0	265,0	308,0	379,0
Information services			1,0		
<b>IMPORTS</b>	169,0	196,0	190,0	178,0	184,0
<b>Charges for the use of intellectual property n.i.e</b>					
<b>Other business Services</b>	1,0	2,0	6,0	1,0	
Research and development (R&D)	1,0	2,0	6,0	1,0	
<b>Personal, cultural and recreational services</b>		2,0			
Audiovisual and related services		2,0			
<b>Telecommunications, computer, and information services</b>	168,0	192,0	184,0	177,0	184,0
Computer services	156,0	174,0	170,0	158,0	168,0
Information services	12,0	18,0	14,0	19,0	16,0

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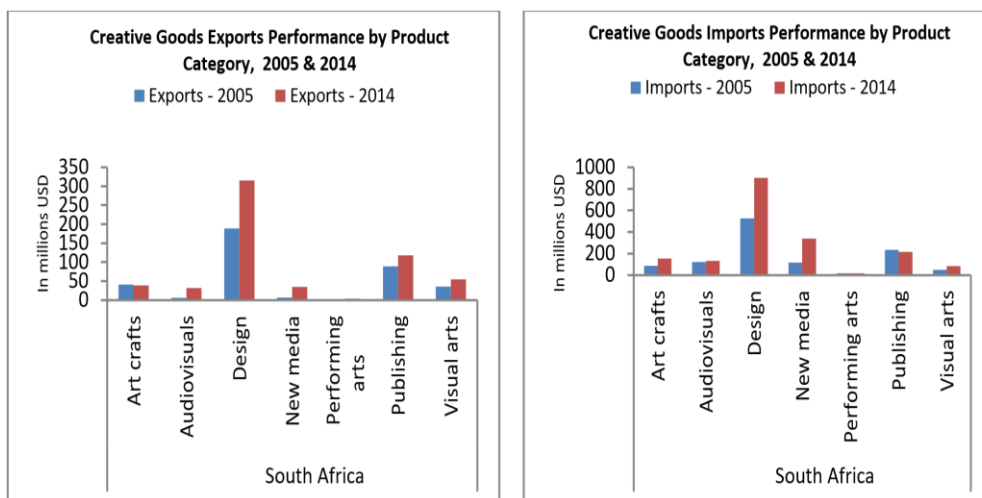
### **Pakistan-Africa CCI Performance**

Pakistan's creative goods and services trade with Africa reflects huge untapped potential. In 2015, the entire Africa accounted for 2% of Pakistani creative exports with no African country in the top 10 markets or trade partners. While Pakistan and Africa can collaborate in any of the CCI sectors, the most thriving ones globally are design, fashion, and film. Fashion goods, interior design, and jewelry accounted for a 54% of creative goods exports globally in 2015. Asia, Latin America, and Africa are rising fashion markets (KuKu et al., 2018). Indeed, both desk review and key informant input

unanimously show that Design and Creative Services especially Fashion, Audiovisual and Interactive Media especially Film; Visual Arts and Crafts; Performance and Celebration; and Cultural and Natural Heritage represent the greatest promise for Pak-Africa collaboration. The following section provides a brief overview of the possible collaboration in creative goods and services with top three African economies.

## Figure 8

### *South Africa-Creative Goods Imports by Region (2005-2014)*



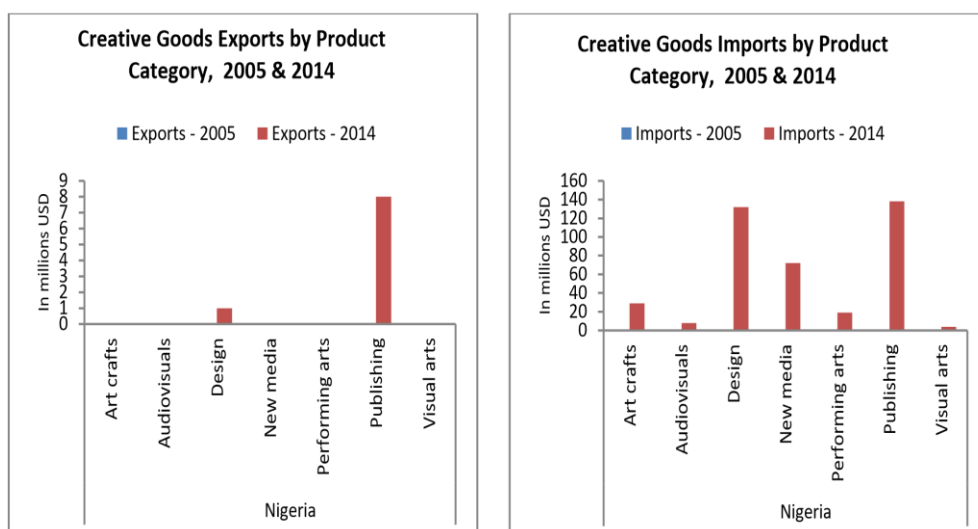
Note: *Creative economy outlook*, by Kuku et al., ©2018. Reprinted with the permission of the United Nations.

*South Africa* has a huge trade deficit in CCI trade; in 2015 its imports were \$1.8 billion, three times higher than the exports at \$598,79 million despite being among the top 10 exporters of visual arts among developing economies. In creative goods imports, Design has consistently remained the highest from 2005-14 followed by new media; publishing; art crafts; and audiovisuals (Fig. 8). Pakistan and South Africa have an overall bilateral trade of \$1.1 billion; however, Pakistan is in a trade deficit with South Africa (Ilyas, 2021). Pakistan's decent performance in specific CCI sectors and a corresponding market in South Africa (Fig. 6 & 8), offer an opportunity to address this deficit. South Africa's need for import especially in Design and Art Craft make it an attractive market for Pakistan that is among top 10 Art

Crafts exporters from the developing economies with Design taking the second largest share. Likewise, in services imports, South Africa offers a huge market to Pakistan for personal, cultural, recreational, and the audiovisual given its need and Pakistan's rich cultural and recreational sectors. South Africa's major trade takes place with Europe, Africa, and America while its partnership with Asia stands at barely 5% with no country figuring in top 10. While in 2005, Pakistan's CCI exports and imports to South Africa stood at \$5735 and \$0.33 million respectively with an attractive trade balance of \$5702 million, in 2014, South Africa did not figure in the top trading partners (Table 2). Thus, a huge market for Pakistan's CCI export has been lost that can be renewed with a liaison between the Ministry of Commerce and NHCD and South Africa's National Department of Arts and Culture and South African Cultural Observatory.

**Figure 9**

*Nigeria-Creative Goods Imports by Region (2005-2014)*



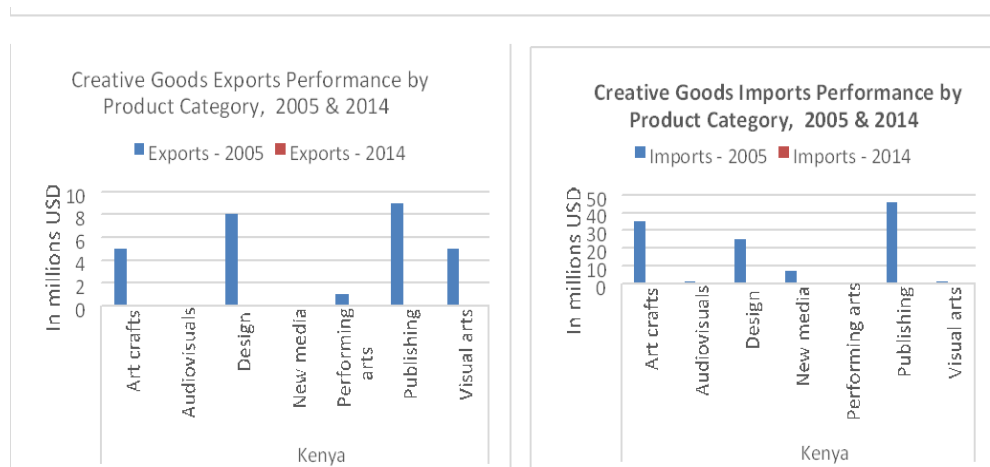
*Note: Creative economy outlook, by Kuku et al., ©2018. Reprinted with the permission of the United Nations.*

Pakistan's overall trade deficit with *Nigeria* stands at \$87.2 million. Among the 29 million goods that Pakistan exports to Nigeria are apparatus for the reception/transmission of voice/images, fabrics, and chewing gum (Ilyas., 2021). This deficit can be addressed through CCI trade. Nigeria's balance of

trade for creative goods export has been in the negative through the 2005-14 period with exports and imports at \$912 and \$40189 million respectively. Publishing (\$140 million) and Design ((\$130 million) are both high potential import and export categories with New Media (\$70 million), Art Crafts (\$30 million), Performing Arts (\$20 million), Audiovisuals (\$10 million) and Visual Arts (\$5 million) following. As Design (\$758 million) and Art Crafts (\$106 million) are Pakistan's areas of strength with \$150 million worth of exports, these offer great potential for Pakistani creative products in Nigeria. Likewise, Pakistan's export performance in Publishing (\$100 million), Audiovisuals (\$130 million), and New Media (\$30 million) also offer potential for expansion. Nigeria's trade with Asia stood at 9% with a huge trade deficit with China. Creative services imports took place in telecommunication, computer, and information services—sectors that are among Pakistan's strengths (Kuku et al., 2018). Nigeria shares with Pakistan challenges like post-disaster reconstruction and security threats; therefore, the two countries can work together to find areas of collaboration that also help tackle challenges and boost economic growth.

**Figure 10**

*Kenya-Creative Goods Imports by Region (2005-2014)*



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Kenya's imports of creative goods also exceed its exports making it a potential market for Pakistani CCIs. In 2013, Kenya's exports and imports were \$4092 and \$19511 million respectively with a trade deficit of -\$15419. Among the main import categories were Publishing (\$45 million), Art Crafts (\$35 million), Design (\$25 million), New Media (\$8 million), and Visual Arts (0.1 million). Services trade was dominated by telecommunication, computer, and information. Kenya's creative goods demands offer huge potential given Pakistan's international standing in Design and Art Crafts. Likewise, Kenya's services import needs can be matched with 97% of Pakistan's share of creative service exports (Table 3). Kenya's major trade takes place with Africa and America while its trading partnership with Asia stands at 3% with no country figuring in top 10 (KuKu et al., 2018).

There are approximately 233,111 people of Pakistani origin in Africa representing just under 3% of the global body of overseas Pakistanis. South Africa hosts 200,000 Pakistanis; Kenya has 10,000 Pakistanis; and Nigeria has 2050 (Yearbook 2019-20). Over 90% of overseas Pakistanis in Africa reside in these three countries which makes them the top choice for expanding CCI trade. This diaspora provides a relatively unexplored market for Pakistani CCIs. For instance, Pakistani fashion and textile brands like Khaadi, Bareezé, Gul Ahmed, Chen One etc., that have started expanding in Asia, Europe, Australia, America, and the Middle East also need to tap into the unexplored African region. Besides, given the shared cultural heritage of India and Pakistan, the Indian diaspora in Africa that constitutes approximately 2,710,6545 people (Vasudeo, 2022) also represents a potential market for Pakistani CCIs (e.g., Pakistani TV dramas are popular among Indians globally).

As per the data discussed above, the top creative export categories for Pakistan are Design and Art Crafts while services exports include R&D and Telecommunication, computer, and information services. All these figure widely in the creative goods and services imports of African countries, which makes them a potential market for Pakistan. Africa is recognized as a rising fashion market with a high demand for fashions goods, interior design, and jewelry especially in Nigeria and South Africa (KuKu et al., 2018). Pakistan is already performing well in these areas; with policy interventions, Pak-Africa trade in these can become the country's strength amid the current economic meltdown. Interestingly, China that is leading world creative trade has no significant presence in South Africa and Kenya while India has no

major presence in all three countries vis-à-vis creative trade. This vacuum can be filled by Pakistan with pertinent policy frameworks and mutual trade agreements. Significantly, Pakistan's overall performance in creative trade has posted a consistent trade surplus over the entire nine-year period (2005-14) despite a gradual decline (Fig. 6). Likewise, Pakistan has maintained a trade surplus with 9 of the top 10 trading partners. This shows that Pakistan has carved a niche market for its creative goods and services which may be lost without intervention and can be extended to Africa and East and Southeast Asia with effective policies.

### **Conclusion**

There are multiple reasons for Pakistan's modest performance in CCIs both locally and internationally. To begin with, without a cultural policy in place, Pakistan cannot regulate and promote CCIs. Second, Knowledge Economy demands reevaluation of education, research, and training systems vis-à-vis international standards of innovation and competitiveness. Pakistani educational system significantly lags in this context. While the average education and skill subindex score of Asia and the Pacific (4.66) in the Knowledge Economy Index is around half the average score of the OECD countries (8.01), Pakistan unfortunately stands at a meagre 1.44 (ADB, 2014). Third, Pakistan has consistently lagged in the Ease of Doing Business (EDB) index over the past decade. From 2008-2019, the EDB in Pakistan posted an average of 117.17 with the lowest and highest scores of 85 and 148 in 2009 and 2015 respectively. As per the 2020 Report, Pakistan stands at 108th. While this 28-mark improvement from the previous year's 136 is encouraging, recent economic and political meltdown darkens the prospects of any sunny predictions. Recently, S&P Global Ratings lowered Pakistan's credit rating to CCC+ from B- in December 2022. Likewise, Moody's credit rating for Pakistan has been set at Caa1 with negative outlook while Fitch's credit rating for Pakistan was also CCC+ with n/a outlook. Besides, unprecedented floods, rising inflation, growing global interest rates, debilitating foreign exchange reserves, and political instability will continue to haunt Pakistan's economic landscape in 2023 (Trading Economics, n.p.).

Fifth, although there is a high potential for entrepreneurship in Pakistan given the country's huge young population and rising digital consumption, as per the Global Entrepreneurship Index 2018, Pakistan ranks 120 among 137 countries. This is due especially to a lack of investment in the following three areas: effective policies and infrastructure; funding for start-

ups; and promotion of local talent (Bokhari & Syed, 2019). Indeed, there is a general lack of policy vision and will accompanied by bureaucratic inertia that preclude major policy innovations. Finally, Pakistan's security situation has been the biggest challenge in the face of its advancement in the Knowledge Economy in general and the CCIs in particular. Over the two decades following 9/11 and the war on terror, Pakistan's economy paid a huge price of up to \$126.79 billion related to terrorist activities (Zakaria 2019), which further strained a teetering economy's struggle for survival. Pakistan's Terrorism Index averaged 7.87 from 2002-2019, reaching its peak at 9.07 in 2013 (Pakistan's Terrorism Index). Consequently, tourism suffered a major blow; theatres were closed; musical events were banned or discouraged; and entertainment venues became deserted. This not only damaged the creative sector substantially, it also tarnished Pakistan's global image silhouetted against a landscape of terrorism. While CCIs were negatively impacted by the security challenges faced by the Pakistani state and public, interestingly, they also represent a way out given their promotion of tolerance and diversity. Indeed, while authoritarian regimes can exploit culture to marginalize communities (Hammoudi, 1997), the arts and culture also offer powerful tools to challenge fascism. South Korea, UK, and Australia represent major case studies of the deployment of culture to promote multiculturalism and project soft power. Pakistan must invest in similar endeavors that will allow the country to promote its CCIs and cultivate its soft image. In this context, this section lists major findings of this study and provides relevant policy recommendations.

## **Findings**

1. Pakistan does not have a CCI policy. CCIs are a misperceived sector information regarding which is limited even among academics and policymakers. Besides, CCIs do not figure in current policies for culture, education, trade, and finance.
2. While the average contribution of Copyright Industries to National GDP and employment is 5.18% and 5.32% respectively, Pakistan stands below average on both at 4.5% and 3.7%.
1. While world creative goods exports more than doubled between 2002-2015, Pakistan's creative exports declined from \$1.363,11 to \$940,59 million.

2. Despite decline, Pakistan has maintained both an overall trade surplus and surplus with 9 of top 10 trading partners, reflecting a niche market which may be lost without intervention.
3. Pakistan is among top 10 Art Crafts exporters from developing economies with a market share of 0.4% in 2015 despite a negative growth rate from 2010-2014.
4. Despite high demand, Pakistan's handmade carpet industry posted a massive decline of 183% in 2015-16.
5. Likewise, cultural products like Peshawari chappal have a huge international market that is being appropriated by foreign designers.
6. In 2014, Africa accounted for 2% of Pakistani creative exports, down from 6% in 2005, with no African country in top 10 markets.
7. Art Crafts and Design, personal, cultural, recreational, audiovisual, R&D, telecommunication, computer, information, and intellectual property reflect maximum potential for Pak-Africa trade.
8. Major challenges faced by Pakistan's CCIs are lack of vision and will at the policy level; bureaucratic bottlenecks; security challenges; economic and political instability; weak governance; lack of institutionalized support, regulatory frameworks, and public investment; international brand identity; insufficient financial and technical resources; non-conducive business environment; and absence of official data.

### **Recommendations**

*A National CCI Plan (NCCIP)* needs to be developed as part of the National Culture Policy that is tasked to develop the following entities: 1. Pakistan Creative Economy Network (PCEN), 2. Pakistan Creative Economy Taskforce (PCET), 3. Pakistan CCI Policy (PCCIP). NCCIP must take as its first step the ratification of the UNESCO 2005 Convention.

1. PCEN will consist of representatives from national and provincial academic/research/cultural institutions, artists, creative entrepreneurs, and civil society members. The network will create awareness regarding the nature and scope of CCIs through organizing annual Pakistan Creative Economy conference; annual Creative Economy

Festival; and Creative Economy Skills and Training Programs. PCEN will provide recommendations to PCET for implementation.

2. PCET will include representatives from relevant ministries (Education, Communication; Commerce; MOFA; Information Technology; Interprovincial Coordination) tasked with mapping Pakistan's CCIs to determine their value and potential; identifying sectoral needs for preferential treatment; and evaluating CCI performance for policy review.
3. PCET will be responsible for drafting, implementing, and monitoring of a comprehensive PCCIP that includes intervention in Legislation; Capacity Development; Market Accessibility; and Investment as follows:
  - conducive environment, governance, and policies to boost creative productions/expressions
  - tax exemptions, discounts, and deferrals for CCI sectors
  - introduction and enforcement of copyright laws
  - access to digital technology, internet, other telecommunications in CCIs
  - international agreements for cultural goods/services trade
  - record and generate CCI sectoral data
  - Pak-Africa collaborations in capacity building across CCI sectors
  - special fast-track visa services for CCI artists/professionals
  - identify/broaden markets for Pakistani creative goods and services in Africa through surveys, consultations
  - identify requisite infrastructure, human resources for the dissemination of creative goods and services in Africa
  - ensure equal opportunities in CCIs across ethnic, gender, religious groups
  - promotion of CCIs in non-cultural sectors to encourage investment

- investment between all levels of government, financial institutions, private sector, individual creators, civil society, media, international organizations
- USAID-funded business incubation centers at research institutions
- incorporate culture in educational policies from primary to higher education

The recently launched *National Security Policy of Pakistan (2022-2026)* has reoriented the focus of Pakistan's foreign policy towards geoeconomics; however, like the "Look Africa Policy," this also does not consider culture's potential. Given the current economic crisis, a targeted CCI policy and its implementation could increase Pakistan's exports, especially since the estimated untapped potential of CCIs in Pakistan is in \$billions (Rafi, 2014). This investment in CCIs could provide a much-needed rise in the foreign exchange reserves that have fallen to a meagre \$6.1 billion (State Bank of Pakistan, 2022)—a development that will certainly be hailed by the international Monetary Fund. However, for any cultural policy to take root, an environment conducive to its aims and objectives is a prerequisite. Therefore, to reshape its cultural and creative future, render its CCIs a dynamic industry of socioeconomic prosperity, and improve its global image, Pakistan must work to promote the values of tolerance, diversity, and equality across all dimensions of social life.

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