Developing Creative Industries in Jordan
A Call to Action

A review of the major challenges currently facing the creative sector and a set of actionable recommendations for change

Developing Creative Industries in Jordan
A Call to Action

A review of the major challenges currently facing the creative sector and a set of actionable recommendations

Written by BOP Consulting and Dr. Faris Nimry

Acknowledgements

Interviewees and representatives from four sub-sectors of the creative industries in Amman actively participated in our focus group sessions which formed the basis of this study. EUNIC and the Consultants express their gratitude to all the participants who generously contributed their time in order to ensure that this document reflects a broad spectrum of opinion and experience.

Contents

Table of Figures

Contents
Developing Creative Industries in Jordan A Call to Action

List of Acronyms

CPD	Continuing professional development
EU	European Union
EUNIC	European Union National Institute of Culture
GDP	Gross Domestic Product
JEDCO	Jordan Export Development Corporation
ICT	Information Technology Association of Jordan
INTAJ	Information Technology Association of Jordan
IP	Intellectual Property
IPR	Intellectual Property Rights
IT	Information Technology
RFC	Royal Film Commission
RISICA	Red Sea Institute of Cinematic Arts
R & D	Research and Development
WIPO	World Intellectual Property Organization

Foreword by the European Union National Institutes for Culture (EUNIC)

The European Union National Institutes for Culture (EUNIC) is a network of cultural institutes of EU member states that have come together in order to strengthen international dialogue and cultural cooperation between its members and its partners in Jordan.

Throughout 2012 and 2013 EUNIC Jordan has been tasked by the European Union Delegation in Amman with supporting the development of the creative industries in Jordan. The EuroMed Forum, which was convened by EUNIC in Jordan last year, focused on forming regional networks as well as identifying shared regional priorities and aspirations for the creative sector. The Forum was also a useful platform for EUNIC in Jordan to understand how best to move forward in its support for the creative sector and hence the focus of activities this year has been on Jordan only.

The creative sector is important because its outputs shape the identity of a country and its people. It is also important because it enables dialogue and exchange; and finally, as this document seeks to demonstrate, it is important because it is a sector that contributes to the economic prosperity of a country.

As cultural relations organisations, EUNIC Jordan felt uniquely placed to bring together representatives of four different sub-sectors under one banner of creative industries – linking them all for the first time and helping them to recognize that they share the same needs and face the same issues. We provided a sounding board for these sub-sectors to voice their needs and propose solutions to the issues they face and this resulting Call to Action represents the opinions of those sub-sectors which we felt it incumbent upon us to the present to the public.

It is a responsibility for us all – international organisations, national entities, government and even the individuals who took part in this research – to recognize the importance of the creative industries to the country's economy and to act in a way that will always encourage individual and collective creativity, in whatever form it takes.

Robin Rickard, British Council

Christiane Kraemer Hus-Hus, Goethe-Institut

Charles-Henri Gros, Institut Français

Luisa Fernanda Garrido, Instituto Cervantes

Maria Rosaria Papa, Società Dante Alighieri

September 2013

Executive summary

This study has been commissioned by EUNIC, the European Union National Institutes of Culture, acting on behalf of the EU Delegation to Jordan. It has been prepared by BOP Consulting and Dr. Faris Nimry. It represents the culmination of two phases of research and strategy development work on Jordan's creative industries that were carried out between August 2012 and July 2013. The first survey phase of research was undertaken by En:Consult, with BOP Consulting.

Our consultation with key stakeholders in the creative sector in Jordan revealed early on that there is an industry perception that there are already enough studies and reports on the cultural and creative field in Jordan. Instead of theory, companies and individuals want practical steps in order to create business and improve their capacity and sustainability.

This document seeks to make the first step from research into action by fulfilling the following three purposes, namely to:

1. establish the best available evidence that exists on the sector

2. use this to identify what the key challenges and needs are that are currently facing the sector; and then

3. issue a 'call to action' by outlining a range of actions that industry believes can be taken to meet these challenges – actions to be taken forward by the sector itself and by a range of stakeholders, including EUNIC.

The creative opportunity and imperative for Jordan

The creative industries have become an important component of many countries' economic competitiveness. They offer opportunities to emerging economies to participate in high-growth areas of the international economy while also providing value-added inputs into the wider economy.

Jordan is one of the smallest economies in the Middle East and unlike other Arab countries, has only limited natural resources and minerals to rely upon and is a non-oil producing country. The country's key opportunities for developing its competitiveness in the future therefore lie within its knowledge-based industries. In this, Jordan's IT sector has led the way, with a concerted national IT strategy having underpinning some notable gains in regional and international markets and contributing to an increasing share of Jordan's GDP. It is high time, therefore, that the creative industries were

considered as the next development of Jordan's knowledge economy.

Where are we now?

Statistics on the creative industries in Jordan are hard to generate. The best available reliable source is the 2013 WIPO report. This looks at the analogous concept of the 'copyright industries' and demonstrates that they contribute 3% of overall GDP– small, but already in excess of several other industries including mining, electricity and water, and close to the agricultural sector (3.5%). The industries employ a slightly larger share (3.4%) of the total labour force.

What is stopping us?

'Jordan has world class expertise, but not world class institutions' (interviewee)

Despite the progress that has been made in recent years and the clear examples of business success that already exist, fundamentally the creative industries in Jordan remain a sector which is hampered by a number of major challenges. Most crucially, despite the rhetoric, the sector's development has been neglected by policy-makers. Added to this, the implementation and enforcement of the country's intellectual property rights (IPR) commitments is still lacking. Beyond these regulatory and macro- economic challenges lie a host of other industry-specific challenges, not least of which is the lack of a collective voice.

What needs to change?

'We are stronger together' (workshop participant)

There is an urgent need to establish a collective body that can organise, support, promote and advocate for the creative industries in Jordan. It needs to be industry-owned and run, and its actions to be transparent and accountable. It would act for the creative industries as a whole, but would also expect to have four working groups (Audio-visual, Creative Services, Performing and Visual Arts), that would hone and implement actions that address the specific needs of these sub-sectors. There are already exemplars in Jordan as to how such a collective body might be organised, in particular INTAJ, which represents the IT sector.

The collective body would not have a regulatory function. It would primarily be a marketing, business development, capacity building and advocacy body. Its ultimate aim would be to increase business

opportunities locally and internationally for the sector while also improving the competitiveness of the sector.

Phase II of the research provided plenty of industry-sourced ideas for the kind of activities that the body would lead on and coordinate. These are summarised below and will need to be discussed, appraised and then taken forward or discarded.

1. Marketing and business development: establishing a promotional brand for the sector; (co)-organising trade markets and large-scale events in Jordan; supporting outbound participation in international trade fairs and exhibitions; working with international cultural institutes to better design international touring and showcasing opportunities; and liaising with government to include the creative sector in mainstream international promotion activity for Jordan.

2. Capacity building: improving the skills and professionalism of employees and businesses within the sector, thereby upgrading the quality of its output. This will be achieved through coordinating post entry peer-to-peer skills development (e.g. brokering mentoring, organising programmes of master classes and skills swaps); developing industry prizes and awards as development tools to both raise standards and visibility; establishing bursaries to support Continuing Professional Development; channelling development investment into programmes to upskill and support the sector; working with universities to improve curricula for creative subjects and providing industry-links to the best courses; developing community solutions for introducing and inspiring children through the arts and creative activities (e.g. in after school clubs).

3. Advocacy: improving the quality of coverage of the sector in the media; educating and informing both businesses and the public about the value of the sector and what to look for in commissioning and buying creative services; lobbying government to (i) adapt existing policies on R&D to ensure they benefit creative companies (ii) address and resolve aspects of government tendering regulations that discriminate against

specialist companies and consortia and (iii) working with government, banks and investors to improve the flow of investment to business in the creative sector, specifically through a better recognition of the financial value of IP and other 'intangible' assets.

In other areas, the collective body's role would be less 'hands-on' and it would look instead for other partners and stakeholders to take the lead. These areas include:

• Establishing an Accelerator / Investment Fund that would invest in early stage creative businesses and be commercially run.

• The Fund could usefully be combined with a "creative park" – office space for creative companies to co-locate and benefit from shared services, networking, and other incubation services (e.g. mentoring, financial advice). Obvious partners for providing the space and management of the park are universities and business support agencies.

Establishing the Jordanian equivalent of the UK's "Arts & Business" –an organisation that brokers relationships and educates corporates about the benefits of sponsoring and investing in the arts, as well as working with arts organisations themselves on how to package and communicate their value to sponsors.

Improving the performance of the creative industries in Jordan cannot be achieved overnight. This call to action does not in any way constitute the end of the process. It is instead the start of the journey, one that will necessarily be a long one. EUNIC, through the Creative Industries Project which is financed by the European Union, has provided support for some immediate next steps:

• a symposium in October 2013 where the industry will come together to share ideas and actions contained in this document

• a website for the creative sector to promote itself, find out more about existing resources, network, collaborate and start the next phase of Jordan's creative economy.

1. Introduction

This research has been commissioned by EUNIC, the European Union National Institutes of Culture, acting on behalf of the EU Delegation to Jordan. It has been prepared by BOP Consulting and Dr. Faris Nimry ('the consultants'). The work contained within this short document represents the culmination of two phases of research and strategy development work on Jordan's creative industries that were carried out between August 2012 and July 2013.[1]

This document seeks to make the first step from research into action by fulfilling the following three actions.

1. Establishes the best available evidence that exists on the sector – gained through government statistics, existing research studies, and primary research undertaken for this project. In total, well over one hundred organisations have participated in the research for both phases of the work.

2. Uses this to identify what the key challenges and needs are that are currently facing the sector; and then.

3. Issues a 'call to action' by outlining a range of actions that industry believes can be taken to meet these challenges. Crucially, there are many steps that the sector can take to help itself, in addition to actions that will need to be worked up and implemented jointly with a range of stakeholders, including EUNIC.

The second and third of these functions was the subject of Phase II of the research, in which the consultants facilitated a process of industry-led discussion and structured brainstorming. More detail on the participants and methodology for this stage of the work are contained in the Appendices.

Improving the performance of the creative industries in Jordan cannot be achieved overnight. This research does not therefore constitute the end of the process. Rather, it is the start of the journey, one that will necessarily be a long one.

---

1 The first survey phase of research in 2012 was undertaken by En:Consult.

2. The creative opportunity for Jordan

2.1 The rise of the creative industries

Over the past three decades, advanced economies across the world have witnessed a move away from manufacturing industries, and at the same time, a growth of their knowledge-based industries. In addition to including financial and business services, life sciences and IT, "creative industries" have more recently been acknowledged as an increasingly important component within the knowledge economy. And this in turn implies that they are increasingly considered as playing an important role within a country's economy as a whole.

But what exactly is meant by the creative industries? The most quoted international definition was developed by the UK's Department for Culture, Media and Sport (DCMS), which in 1998 defined the *creative industries* as "those activities which have their origin in individual creativity, skill and talent, and which have a potential for wealth and job creation through the generation and exploitation of intellectual property".[2] More recently, the United Nations Conference on Trade and Development (UNCTAD) defined the creative industries as "the cycles of creation, production and distribution of goods and services that utilise creativity and intellectual capital as main inputs".[3]

While there is no standard definition of the specific sub-sectors included within the creative industries – as most countries "adapt the concept to meet their own needs" – there nevertheless today exists a degree of consensus over which sectors are predominantly included[4].

Figure 1 on the right provides a useful overview of which sectors are typically considered as part of the creative industries, using the examples of four of the EUNIC member states.

The ways in which the creative industries contribute to a country's economy are today generally considered in terms of two interrelated capacities:

- As a growth sector with a direct impact in its own right. Rising levels of education and income have lead to an increase in demand for culture, media and entertainment goods and services over the last thirty years, which needs to be met.[5]

- Providing intermediate input into other goods and services. Creative services such as design, advertising, branding, digital media and communications are all vital ingredients ('aesthetic inputs') into an economy that, as a whole, has become 'culturalised'.[6]

This means that through both their own contribution to overall GDP and jobs, as well as through economic 'spillovers' into the wider economy,[7] the creative industries have become an important component of a country's economic competitiveness.

Crucially, it has become clear over the last decade that the rise of the creative industries is not a trend that is exclusive to the world's advanced economies. As suggested in the British Council *Mapping the Creative Industries* toolkit, "The creative industries are important both to developed nations and developing ones […] and [offer] potential benefits to emerging economies."[8]

Recent trends offer strong support for this claim. In 2010, fully 43% ($176bn) of the trade in creative goods and services was accounted for by the global south (led by China), with an annual growth rate of 13.5 % between 2002 and 2008[9]. In another example, the UNESCO 2006 report on the potential of India's entertainment and media industry claimed that the "Indian entertainment and media (E&M) industry has out-performed the Indian economy and is one of the fastest growing sectors in India".[10]

This evidence clearly demonstrates the opportunities that the creative industries offer emerging economies to participate in high-growth areas of the international economy.

---

2 British Council (2010) *Mapping the Creative Industries: A toolkit*
3 UNDP/UNCTAD (2010) *Creative Economy Report 2010*
4 British Council (2010) *Mapping the Creative Industries: A toolkit*
5 Work Foundation (2007), *Staying ahead: the economic performance of the UK's creative industries.*
6 Lash, S and Urry, J (1994), *Economies of Signs and Space*. London: Sage
7 Bakshi, H, McVittie, E, and Simmie, J (2008) *Creating Innovation: Do the creative industries support innovation in the wider economy?* NESTA Research Report 28
8 British Council (2010) *Mapping the Creative Industries: A toolkit*
9 UNDP/UNCTAD (2010) *Creative Economy Report 2010*
10 FICCI and PricewaterhouseCoopers (2006) *Indian Entertainment and Media industry - Unravelling the potential.*

Figure 1 Definitions of the creative/cultural industries

	UK	GERMANY	SPAIN	FRANCE
Term Used	Creative industries	Cultural and creative industries	Culture industries	Cultural Sector
Architecture	X	X		X
Audio-visual (film, tv, radio)	X	X	X	X
Performing Arts	X	X	X	X
Libraries			X	X
Design	X	X		
Art market/visual arts	X	X	X	X
Publishing	X	X	X	X
Fashion	X			
Software/ multimedia	X	X		
Museums/cultural heritage			X	X
Music	X	X	X	X
Crafts	X			
Advertising	X	X		

2.2 The opportunity and imperative of the creative economy for Jordan

With a population of only 6.2 million and a total GDP of JD 20.5 billion, Jordan is one of the smallest economies in the Middle East.[11] Unlike other Arab countries, has only limited natural resources and minerals to rely upon, is a non-oil producing country, and has very few strengths in manufacturing.

In the past years, Jordan has struggled to maintain a steady growth rate, with the average annual growth rate of real GDP dropping from over 8% between 2005 and 2008 to 2.3% in 2010. At least in part, this may be attributed to the sharp decline in foreign direct investment (FDI) that Jordan experienced over the same period – from JD 2,512.7 million in 2006 to JD 1,043 million by 2011[12]. Although the country's exports have been increasing, Jordan currently still imports almost double the amount that it exports, leading to a rapidly growing trade deficit – it reached JD 5,895 billion in 2011, the highest in six years[13]. Alongside this, Jordan has been suffering from endemic high unemployment rates of over 10%, low participation in the labour market – particularly women, 16% in 2011 [14] - as well as high inflation for the past decade[15].

Taken together, these figures demonstrate that Jordan continues to struggle to find a footing within the global competitive economy and has yet to achieve a real measure of competitiveness.

Given its lack of natural resources, the country's key opportunities for developing its competitiveness in the future lie within its knowledge-based industries, and the development of products and services that are underpinned by information and innovation.

In this, Jordan's IT sector has led the way, with a concerted national IT strategy and supporting agencies[16] having underpinned a growing crop of regionally and globally competitive digital businesses[17]. For the reasons outlined above, the creative industries now need to take their place alongside the IT sector in Jordan's knowledge economy.

"Creative businesses, driven as they are by ideas and creativity, do not necessarily need access to large sums of capital or natural resources. For countries with rich cultures and a pool of local creative talent, the creative economy offers a way to build economic value.[18]"

And while Jordan may struggle with providing the 'large sums of capital or natural resources' needed to develop other industries, it certainly has both of the latter – a rich culture and a pool of local creative talent – in abundance.

It is high time, therefore, that Jordan's creative industries were considered not just as 'nice to haves', or as sectors that are a drain on the economy, but understood instead in terms of the real potential they offer for Jordan's overall economic development and competitiveness. In order to reach this potential, the challenge is how workers and entrepreneurs in Jordan's creative industries can be better organised and supported for the benefit of the economy as a whole.

---

11 Central Bank of Jordan (2010), *Monthly Statistical Bulletin, July, 2012*
12 Ibid.
13 Ibid
14 World Bank, 'Labor participation rate, female (% of female population ages 15+)', http://data.worldbank.org/indicator/SL.TLF.CACT.FE.ZS
15 Jordan Department of Statistics, www.dos.gov.jo

16 INTAJ, the Information and Communications Association of Jordan, "a voluntary non-profit, private organisation representing, promoting and advancing the Jordanian software and IT services industry in the global market." *(www.intaj.net/)*
17 For example Maktoob, an Arab Internet services company and the first free Arabic/English web-based email service provider, which was founded in Amman in 2000 and was bought by Yahoo! In 2010 for over $160million.
18 British Council (2010) *Mapping the Creative Industries: A toolkit*

3. Where are we now?

Jordan's scarcity of natural resources has long been recognised in the country and as a consequence, has led the country's policy-makers to focus on the development of "the talents and [...] creativity of its people" for some time. Most prominently, this approach was promoted by the late King Hussein, who coined the phrase "الإنسان أغلى ما نملوك" – "The human is our most precious property".[19] King Abdullah has continued to support this approach – keen to drive Jordan further on the path to becoming a knowledge-based economy, he has expressed his hope for Jordan to " [...] become a regional hub for information technology and other creative arts industries".

This focus on investment in human resources has led to some impressive achievements, such as the fact that, while constituting only 3% of the Arab population, Jordan today boasts 10% of all universities in the Arab world.[20] Similarly, with computer science and technology now integral to the Jordanian education system, **more than 3.5 million Jordanians today use computer technology and social media (slightly more than 50%), and are responsible for creating more than 75% of the Arabic content of the internet.[21]**

In recognising the existence of intellectual property rights (IPRs) to protect the value of creative products and services as fundamental to the development of the creative industries, Jordan has recently also ratified several IPR laws and become party to a number of international IPR agreements[22].[23]

There exists in Jordan today a huge potential for the development of the creative industries – both in terms of its "pool of local creative talent" as well as the laws to protect their output. Much has changed already. Recent years have seen a rise in cinema activity in Jordan, most noticeably supported by the introduction of new education facilities via the Royal Film Commission in 2003 and the establishment of the Red Sea Institute of Cinematic Arts in 2008 – "both testifying to state-led efforts to develop Jordan's film industry".[24] Changes have also been visible in the music sector, with new forms of available training leading to a wider variety of instruments played and a growth in international partnerships.

While not an internationally recognised arts exhibition and sales centre, Amman in the past decade has also seen "a significant growth in the private gallery network and a growing number of collectors and people interested in art. This has enabled galleries to put on more, and more ambitious shows and to bring in more artists from abroad"[25], at the same time as it has boosted the domestic visual arts scene. Encouragingly, fields such as filmmaking, television, advertising, video production, web design, animation, pop music production and distribution and video games have all seen a rise in private sector involvement, making them less dependent on state-subsidies or international support. [26]

Statistics on the creative industries in Jordan are hard to generate. The best available reliable source is the 2013 WIPO report, which documents the importance of the copyright industries to Jordan. Given the importance of intellectual property to the creative industries, the "copyright industries" is, in many ways, an analogous sector[27]. The WIPO report demonstrates that these efforts have begun to show a measure of success in terms of their contribution to GDP and job creation. Looking at the most recent data, the copyright industries contribute 3% of overall GDP. While this initially sounds small, it already exceeds several other industries including mining, electricity and water, and is close to the agricultural sector (3.5%). The industries employ 3.4% of the total labour force.[28] In addition to this, it is worth considering the wider impact – the creative industries' ability to add value to the rest of the economy. According to the WIPO report, the authors' research demonstrated "[...] a significant impact of the copyright industries on the value added of other economic sectors", with a multiplier effect calculated by WIPO at JD30. In other words, "one JD of copyright output directly generates JD30 of output in the economy".[29]

19 WIPO (2012), *Economic contribution of the copyright-based industries in the Hashemite Kingdom of Jordan*
20 Ibid.
21 Ibid.
22 Among others, it has ratified over 40 IPR multilateral treaties, including the Agreement on Trade-Related Aspects of Intellectual Property Rights (TRIPS Agreement) of the World Trade Organization (WTO) and UNESCO's Declaration on Cultural Diversity (Phase 1 report)
23 EnConsult (2013), *Mapping the Creative Industries in Jordan, Phase 1 Report*
24 UNESCO (2010), *A survey of cultural practices in Jordan, 2009-2010*

25 Ibid.
26 Ibid.
27 Copyright-based industries are those engaged in the creation, production, manufacturing, performance, broadcast, communication, exhibition, distribution and selling of protected works and products. The following statistics include press and literature, performing arts, audio-visual, visual arts, creative services such as design, advertising, graphic arts and software development. (WIPO 2012, *Economic contribution of the copyright-based industries in the Hashemite Kingdom of Jordan)*
28 WIPO (2012), *Economic contribution of the copyright-based industries in the Hashemite Kingdom of Jordan*
29 Ibid.

3.1 Jordan's creative industries

Within the Phase II research methodology, the creative industries were grouped into four larger sub-sectors: Audio Visual, Creative Services, Performing Arts and Visual Arts. These industry groupings encompass the vast majority of the creative industries in Jordan[30]. The constituent parts of the sub-sectors are as follows:

- **Audio-visual:** the audio-visual sub-sector consists of a range of activities both relatively old and new. In the former category sits film, TV and cel animation, whereas the latter includes 'born digital' activities such as computer games and special digital effects. Of course over recent years, many workflow processes in film, TV and animation have become digitised, meaning that there is a closer affinity in production processes and skillsets across the industries than when the earlier mediums were analogue. Similarly, as with most creative industries activities, the internet and mobile communication are also providing new platforms for filmmakers and animators to reach new audiences and fund their work, through for instance, short and 'episodic' content and crowdfunding sites. For games, the emergence of smartphones, tablets and the app market has led to an explosion in the range of possible games, alongside more established games platforms such as PC and the various consoles and handhelds (PS, X-Box, Wii, DS, PSP, etc.).

- **Creative services:** covers largely business-to-business activities such as design, advertising and communications, and architecture. Companies that supply these services add value to other sectors (e.g. furniture, automotive, construction, retail, banking and so on), by providing creative inputs that make products and create brands that are more desirable, more user-friendly, more

- functional and more bankable. As with other creative sectors, digital technologies continue to transform the production processes of creative services companies (e.g. highly sophisticated architectural software that enables parametric design); blur the boundaries between disciplines and sub-sectors (e.g. motion graphics overlap with TV and film, and digital advertising and design's extension into the ICT sector); and create new possibilities within the rest of the economy (e.g. 3D printing or 'additive manufacturing').

- **Performing arts:** covers a wide range of different performing arts, including dance (traditional and contemporary), music (again both traditional and contemporary), theatre in its various forms (from 'high art' productions to impromptu street theatre performances) and other forms of 'high art', e.g. ballet and opera. 'Fringe performing' is particularly important for emerging artists, by presenting a founding ground for new talent, and there are frequent overlaps of talent from theatre and music with film and TV (including commercials). Technology is becoming increasingly important and advanced in supporting the staging of live events both in-doors and out-doors. Thanks in particular to online digital technologies, new models of reaching new audiences/ larger audiences have emerged in recent years, such as digital cinema transmission, live streaming and digital downloads.

- **Visual arts:** this again covers several distinct art forms, including more 'traditional' art forms such as painting and sculpture (which in themselves includes various forms, approaches and styles) as well as more recently emerging art forms, such as video and digital art and performance and conceptual art (i.e. where the 'concept' takes precedence over the aesthetics). Particularly the latter often tend to be challenging for general audiences to understand or appreciate, compared to the more 'traditional' forms of the visual arts.

---

30 The main exceptions to this are Crafts and Publishing. Crafts was not included in the research as there has already been dedicated research, strategy and resources invested into the sector in recent years (e.g. USAid Jordan Tourism Development Project's Handicraft Sector Development initiatives and UNESCO's mapping and assessment of handicraft producers and designers in Jordan in 2010). Publishing was not included in the research given the small size and reach of the sub-sector in Jordan, and the strength of industry competitors in the region.

Success stories

The following short case studies highlight specific companies and organisations from each of the four sub-sectors, to provide concrete illustrations of what the new creative economy in Jordan looks like. The companies have all grown into successful businesses, some also recognised internationally.

Darat al Tasweer

A professional photographer with years of experience working as a commercial photographer and photography teacher, Linda Al Khoury in 2007 open the Centre of Photography – Darat Al Tasweer – in Amman.

Through Darat Al Tasweer, Linda aims raise the profile and professionalism of the art of photography in Jordan. In its own words, Darat Al Tasweer's mission is "to stimulate, inspire and introduce the art and craft of photography and its new technologies to both amateurs and professional photographers in Jordan". In order to achieve this, the Centre showcases good photography through exhibitions, installations, events and design and printing services. Alongside this, it offers opportunities for Jordanian photographers to further develop their skills and knowledge via a range of courses (e.g. Black & White Photography, Studio Photography etc.)

Based on this approach, Darat Al Tasweer has become one of Jordan's most important platforms and supporters of photography, increasing the recognition and professionalism of photography in the country.

www.darataltasweer.com

Kharabeesh

Started in Amman 2008, Kharabeesh is a native born online entertainment network that serves Arab internet users around the world. It is now considered as one of the leading multi-channel networks (MCN) and broadcasters on YouTube.

Kharabeesh produces and co-produces genuine shows, animations, music and short movies to be published on YouTube and social media for online audience. In the past 5 years, it has created a network of more than 90 YouTube channels and today generates over 23 million views a month.

Kharabeesh is a leading example of the new generation of entertainment networks, which focus on low budget production/zero publishing cost with growing sales and distribution revenues.

Kharabeesh is now spread all over the region, physically and virtually, building the next big brand, show or star. Kharabeesh is looking to be the gateway and destination for all talents in the region to master the YouTube business and to start their road to stardom.

http://kharabeesh.com

Meisam

Meisam Architects and Engineers was founded in 1986 by Maisa Batayneh Maani, its Principal Architect. "Committed to creating original places, spaces and experiences which elevate the quality of human living", the company's vision is "to be pioneers recognised for the creation of quality built environments through knowledge, innovation and design."

Meisam offers a variety of services (e.g. master planning, urban design, landscape agriculture, engineering & structural design etc.), and, in the past years, has worked on a large number of projects both in Jordan and abroad (principally in the Middle East, e.g. Saudi Arabia, Palestine, Pakistan, Egypt, and Abu Dhabi).

One of their most prestigious projects was their development of "A Gateway to Petra", which in 2012, was shortlisted for the World Architecture Festival Award in the Future Projects category. The company has also worked in international collaborations – most prominently, it worked with London-based company Foster + Partners on the design and construction documents of the new terminal building for Amman's Queen Alia International Airport.

www.maisam.com.jo

Rubicon

Rubicon Group Holding (RGH) is a diversified global entertainment and production powerhouse devoted to the creation of outstanding innovative entertainment experiences and interactive educational content across all media platforms.

Today, RGH has established a reputation for innovation in four distinct business segments; Entertainment, Themed Entertainment, Education & Vocational Training and Games.

RGH has won several international awards and has signed a number of strategic agreements with international leaders in the media and communication industries such as DreamWorks Classics, Metro-Goldwyn-Mayer Studios Inc. (MGM), Cartoon Network (CN).

One of RGH Entertainment most famous productions is Ben & Izzy; a 3D animated series that follows the tales of two young boys, who embark on historical quests to ancient times and exotic locations throughout the Middle East and Africa. Ben & Izzy was released in the US and Arab World and has proven a favorite with kids on Cartoon Network and MBC Network.

RGH has a team of hundreds employees in four locations: Amman (Jordan), Los Angeles (United States), Manila (Philippines) and Dubai (United Arab Emirates). Together, RGH's world-class team collaborates to provide a unique perspective into the realization of compelling digital content and immersive entertainment.

www.rubiconholding.com

Street Theatre
(Masrah Al Sharaa)

Street Theatre was co-founded by theatre and TV actor Ahmad Sror, Ahmad Hijazin and Ibrahim Nawabneh in 2009.

Street Theatre is devoted to critical comedy of life events in Jordan, and deals in particular with issues that Jordanians in the lower socio-economic scale face. By fabricating personalities that entertain passers-by in public places, the actors deal with issues such as the denial of basic rights like freedom of speech to every Jordanian. Ultimately, their aim is to entertain the street audience and promote critical thinking about social issues. They try to engage viewers by keeping them surprised as to what may happen next, requiring them to be quick thinkers and control their reactions to viewer critics and comments.

Street Theatre also presents a TV show called 'Talk of the Tabloids', a sarcastic 'News Hour' comedy that aims to present reform ideas to help empower Jordanians, and works in social development by presenting interactive plays with children to educate them about the importance of communication and dialogue.

Street Theatre has been viewed by His Majesty The King of Jordan.

Syntax

Co-founded in 1998 by current CEO Ahmad Humeid, SYNTAX today is Jordan's largest branding and design company, and one of the region's leading independent brand, design and media consultancies. It employs a team of 25 strategists, designers, architects, writers, media specialists, technologists and project managers, in addition to working within a wider network of "sister companies and international allies".

SYNTAX's services include brand audit, research, focusing and strategy, corporate identity and design, web design, industrial design, interior and architectural design, content/media development and print/publishing design. The company is driven by its belief in the "transformative power of design" and the idea that "great experiences and relevant brands are driven by ideas and insight". It believes its success lies in working as innovation partners with its clients, with an aim to develop, "distinctive brands, informative media, inspiring environments and engaging experiences".

Today, SYNTAX is entrusted with the creation and re-invention of major corporate and institutional brands. Clients come from the worlds of business, government and NPOs, and include both start-ups and large organisation and businesses. In 2004 SYNTAX for example undertook the re-branding and design of the English-language Jordanian daily, The Jordan Times.

www.syntaxdigital.com

The Jordan National Gallery of Fine Arts

In 1980, the Royal Society of Fine Arts (RSFA), founded to run the Jordan National Gallery (JNGFA), established the "contemporary museum collection of artworks from the developing world". In the same year, the Gallery was officially inaugurated under royal patronage, with the aim to "disseminate artistic knowledge and promote art from the Islamic and Developing worlds".

Ever since, "RSFA has pursued the highest professional standards […] in acquiring art works and running the JNGFA". It is today considered one of the major art museums in the Middle East, owning an internationally recognised permanent collection of modern art from the developing world of over 2500 works (including paintings, prints, sculptures, photographs, installations, weavings, and ceramics by more than 900 artists from 60 countries mainly in Asia and Africa). The Gallery now comprises two buildings flanking a sculpture park, including an open-air stage, a Japanese garden and an art lounge and restaurant.

The Gallery runs a dedicated education programme. In 2009, it launched "the Touring Museum" project under the patronage of HRH Princess Rajwa Bint Ali, President of the RSFA. This "pioneer project" brought a sample of the Gallery's collection as well as workshops and lectures by artists and academics to different villages and provinces of the Kingdom, in a bid to " increase the cultural awareness in plastic and visual arts and to introduce the artistic movement in Jordan".

www.nationalgallery.org

The National Centre for Culture & Arts

The National Centre for Culture and Arts (NCCA) is a non-profit and non-governmental organisation, which was established in 1987 by Queen Noor Al Hussein. Its aim "is the incorporation of performing arts in all levels of education in order to promote creativity, humanitarian values, and cross-cultural understanding; to enhance cultural enrichment; and to bring about social change". It hopes to do so "[…] by utilising the performing arts in productions, training and exchange programs nationally and internationally".

Since its foundation, NCCA has been at the forefront of the development of theatre and dance in Jordan and in the region. It has a permanent Interactive Theatre Company and Misk Dance Company. Through providing internationally recognised theatre and dance training courses for children and adults, NCCA has brought theatre and dance to thousands of Jordanians. Each year, its activities and programs reach out to an audience of approximately 37,000 people.

Since 2004, the NCCA has been a full member of the International Association of Theatre for Children and Young People (ASSITEJ). In 2009, the Centre became the representative of the Jordanian Chapter of The International Theatre Institute (ITI) – UNESCO. In the same year, it became a founding member of the EuromedInCulture(s) Network. NCCA has been appointed by UNFPA as the Regional Centre of Excellence on Theatre Based Peer Education, in 2013.

http://www.pac.org.jo

4. What is stopping us?

4.1 Cross-cutting challenges facing the sector

The challenges facing the creative industries in Jordan are many and varied. The following sections of the report identify some of the most important, cross-cutting challenges identified through the Phase II research. This consisted of a pre-focus group and four focus groups with representatives of the four sub-sectors as specified in Section 3.1 (see Appendix II for a full description of the Phase II research methodology). Appendix I contains much greater detail on the sub-sectoral challenges identified through the Phase II research.

4.1.1 Regulatory and macroeconomic challenges

Despite the progress that has been made in recent years and the clear examples of business success that already exist, there is no doubt that fundamentally, the creative industries in Jordan remain a sector which has been hampered in its development by a number of major challenges, which it continues to face today.

Most crucially, despite the rhetoric, their development has so far been neglected by policy-makers – total government spending "[…] on culture and cultural activities is less than 1% of the government budget".[31] Added to this, the implementation and enforcement of the country's IPR commitments is still lacking – for a variety of reasons, including difficult legal processes and the high cost of creative products imported to Jordan. This continues to result in significant infringements on IPR, demonstrated vividly by the multitude of counterfeit videos and pirated software sold and used throughout the Kingdom. These pose a substantial threat to the country's nascent creative industries: in 2011, the software piracy rate in Jordan reached 58%, amounting to a total commercial value of unlicensed software in Jordan of $31 million.[32] As the WIPO report thus concludes, "when it comes to the copyright-based industries, the deeds do not match the rhetoric".[33]

Inevitably, these challenges are reflected in the sector's growth rate over the past years: while the growth rate in the core copyright industries during 2006-2009 averaged 12%, this was relatively low compared with the growth rate of the economy as a whole, at 17.6%[34]. The sector struggles to provide stable work opportunities for its predominantly newly graduated workforce. As the WIPO report notes, "Jordan is not reaping the fruits of its knowledge-based economy, since that economy has been unable to create enough jobs to absorb the tens of thousands of graduates from its colleges and universities". This may indicate both a low skills demand within the country, and at the same time, a skill level among graduates which is not considered sufficiently advanced for international needs. One quote cited in the UNESCO report hints at the latter: "An animation and video game company said that Jordanian educational establishments were failing to produce young people having the necessary skills for work in the industry. As a result, the company tended to recruit Koreans and Indians rather than Jordanians."[35]

Although the potential exists for the Jordanian creative industries to have a positive impact on job and income generation, it thus seems that they "[…] [require more dedicated] policy formation, [IPR] enactment, incentives and training"[36], before the country's policy-makers' stated aims can be reached.

4.1.2 Industry-specific cross-cutting challenges

The focus group meetings revealed a number of common issues and themes (see Appendix II for a description of the pre-Focus Group and Focus Groups methodology). One of the foremost comments was that there were limited local business opportunities in the creative industries. These opportunities could only become a reality with a combination of one or more of**: improved access to funding, institutional support, technical and business training, and marketing and branding.** All groups identified weaknesses or limitations in the education system that produces graduates that go into the

---

31 WIPO (2012), *Economic contribution of the copyright-based industries in the Hashemite Kingdom of Jordan*
32 EnConsult (2013), *Mapping the Creative Industries in Jordan, Phase 1 Report*
33 WIPO (2012), *Economic contribution of the copyright-based industries in the Hashemite Kingdom of Jordan*

34 Ibid.
35 UNESCO (2010), *A survey of cultural practices in Jordan, 2009-2010*
36 WIPO (2012), *Economic contribution of the copyright-based industries in the Hashemite Kingdom of Jordan*

creative sectors. Another prevailing comment was that there are already too many studies and reports on improving Jordan in the culture field. Instead of theory, businesses need practical steps in order to create business and improve their capacity and sustainability. The cross-cutting challenges, not in any priority order, are:

1. **Collective body/association**. While the needs of each of the four sub-sectors cannot all be similarly met or developed, there are synergies to be gained from a collective body that champions the creative sector. Currently there is no such collective, although there are exemplar bodies in adjacent sectors, such as INTAJ, the collective body that represents the IT sector, whose success should be underlined. Other associations that do exist within the individual sub-sectors in Jordan have not been focused specifically on business development and have not been as competent and dynamic as INTAJ. While sub-sectoral specificities are clear in many areas, it was nevertheless felt that 'we are stronger together' – that collaboration in setting strategy, local networking, training, business skills development, marketing, branding, government lobbying, improving media coverage and educational best practices was seen as beneficial. A collective body would help the sector to better address many of the other issues it faces.

2. **Small domestic market and difficulty accessing international markets**. The demand for some of the creative industry services is limited and not growing fast enough to take advantage of the number of business providers in some sub-sectors like Audio Visual and Creative Services. On the other hand, the Performing Arts and Visual Arts are hampered because there is not enough current demand for many of them. Accessing overseas markets is very competitive and requires funds to market and sustain a company until it begins to earn its return on investment. Most Jordanian firms therefore struggle with cash flow problems. Another export factor is that Jordan has not created a recognised brand overseas in the creative industries. Also, Jordan does not seem to have a Jordanian 'cultural identity' which would make it easier to export.

3. **Funding**. Most participants complained of cash flow problems, and that they lacked the funds needed for marketing and business development. **Banking and funders in Jordan do not currently lend to businesses based on intellectual property assets; which have different returns on investment and payback times.** Business support of the Performing Arts and Visual Arts is limited to what is 'popular' and 'known'. Some funding solutions need to be common across the sector while others need to be tailored to different creative sub-sectors. Government support of the arts is limited across the sector, whether looked at in terms of film incentives or incentives for public art. Finally, some participants voiced the opinion that foreign government support of the performing and visual arts was also declining.

4. **Skills gaps and shortages**. Participants reported a range of both skills gaps and skills shortages across all the sub-sectors. Staff with a minimum quality skills exist but are not prevalent across all the sub-sectors. Further, gaps and shortages get more acute at the top end, for companies that need to produce internationally competitive work. Several comments were made that performing and visual artists in particular do not have the business skills to run a commercial operation.

5. **Lack of public awareness.** The impact of low public awareness impacts each of the sub-groups in different ways. Jordanians are a diverse group in taste but also in purchasing power. While interest in the Jerash Festival is high there is limited interest in local cinema. Demand for architects' and designers' work is currently limited as organisations and individuals do not understand the value it adds and therefore see it simply as a cost. Within the visual arts, audience interest in new contemporary forms is limited. Many participants pointed to **the education system as the root of the problems of lack of awareness – art having being removed from the curriculum of state schools in the 1970s.** A second widely cited reason for low public awareness is the **weakness of the media's interest and coverage of the arts and creative industries.**

5. What needs to change?

5.1 Solutions for the sector as a whole

As a result of the four Focus Groups, the following outlines a set of solutions that were common across all of the sub-sectors. They are:

1. Establish a collective body/organisation to represent Jordan's creative industries

As one of the interviewees in the Phase 1 report stated, 'Jordan has world class expertise but not world class institutions'. While this is usually taken to mean government, education and other public functions, the term actually refers to a broader range of organisations and practices, including industry associations and representative bodies. The need for an umbrella body that can collectively organise, support, promote and advocate for the creative industries in Jordan featured in all of the four focus group sessions. It is not an end in itself, but the first vital component in working towards many of the solutions suggested by the four sub-sectors, as these are by their very nature solutions that cannot be delivered through the action of individual businesses alone.

It needs to be clear that this collective body would not have a regulatory function. It is primarily a marketing, business development, capacity building and advocacy body. It would act for the creative industries as a whole, but would also expect to have four working groups (Audio-visual, Creative Services, Performing and Visual Arts), that would hone and implement actions that address the specific needs of the sub-sectors. The point of coming together and representing a larger sector footprint is to get out of the usual 'silos' that organisations and individuals find themselves in, address cross-cutting needs, and share common branding and promotional opportunities.

The details of how exactly the functions of the new body would be carried out would be established as its first actions, but the consultation in Phase II has provided plenty of industry-sourced ideas to be discussed, appraised and taken forward or discarded.

The ultimate aim of the organisation would be to increase business opportunities locally and internationally for the sector, while also improving the competitiveness of the sector. The kind of activities that the body would lead on and coordinate include most of the solutions that are outlined in more detail below. In summary, these are:

- **Marketing and business development**: establishing a promotional brand for the sector; (co)-organising trade markets and large-scale events in Jordan; supporting outbound participation in international trade fairs and exhibitions; working with international cultural institutes to better design international touring and showcasing opportunities; and liaising with government to include the creative sector in mainstream international promotion activity for Jordan.

- **Capacity building**: improving the skills and professionalism of employees and businesses within the sector, thereby upgrading the quality of its output. This will be achieved through coordinating post entry peer-to-peer skills development (e.g. brokering mentoring, organising programmes of masterclasses and skills swaps); developing industry prizes and awards as developmental showcases; establishing bursaries to support Continuing Professional Development; acting as the accountable body for channelling international aid and development investment into programmes to upskill and support the sector; working with universities to improve curricula for creative subjects and provide industry-links to the best courses; developing community solutions for introducing and inspiring children through the arts and creative activities (e.g. in after school clubs).

- **Advocacy**: improving the quality of coverage of the sector in the media; educating and informing both businesses and the public about the value of the sector and what to look for in commissioning and buying creative services; lobbying government to (i) adapt existing policies on R&D to ensure they benefit creative companies, (ii) address and resolve aspects of government tendering regulations that discriminate against specialist companies and consortia, and (iii) work with government, banks and investors to improve the flow of investment to business in the creative sector, specifically through a better recognition of the financial value of IP and other 'intangible' assets.

In addition to the programme of activities that the body would lead and coordinate, its organisational structure and governance would also have to be agreed. It needs to be industry-owned and run, and its actions transparent and accountable. There are already exemplars in Jordan as to how such a collective body might be organised, in particular

5. What needs to change?
Developing Creative Industries in Jordan A Call to Action

21

INTAJ. Alternatively there are also international examples that Jordan could draw upon, such as the UK's Creative Industries Taskforce or Creative London.

Finally, it is envisaged that set-up funding for the body would be needed, and this is where there is perhaps an initial role for donor agencies.

2. Improve access to funding and investment

The four focus groups all identified access to funding and investment as a key constraint on their businesses, although some of the solutions to the challenge will differ according to the sub-sectors.

Private sector finance, funding and entrepreneurship support

- The collective body should work with government, banks and investors to improve the flow of investment to business in the creative sector, specifically through a greater understanding and recognition of the financial value of IP and other 'intangible' assets.

- An Accelerator / Investment Fund should be established that would invest in early stage creative businesses; this would be managed along commercial lines, but could consist of an investment portfolio made up of private sector, charitable and public money.

- The Fund could usefully be combined with a "creative park" – office space for creative companies to co-locate and benefit from shared services (e.g. IT, meeting rooms, reception, etc.) and networking, as well as other incubation services (e.g. mentoring, financial advice). Obvious partners for providing the space and management of the park are universities and business support agencies.

- Corporate Social Responsibility (CSR) and business philanthropy and sponsorship is still a new area in Jordan. Further, evidence from other countries suggests that there is much untapped potential to develop mutually beneficial relationships between large corporate businesses and the creative sector, particularly in the visual and performing arts. However, at present there is little understanding of this or how it can work on the ground. An umbrella organisation – the Jordanian equivalent of the UK's "Arts & Business" – should be established that brokers relationships and educates corporates about the benefits of sponsoring and investing in the arts, as well as working with arts organisations themselves on how to package and communicate their value to sponsors.

Support from domestic government and international institutions

- All creative companies in Jordan would benefit from some financial contribution from government or international government and aid agencies that would enable them to participate in international showcase and trade promotion opportunities, albeit the precise details of which event(s) will vary across the sub-sectors.

- International aid donors need to review the criteria for grant eligibility. At present, the criteria is set so high that it effectively excludes the very micro businesses that the grant programmes are designed to support in the first place.

3. Raise and promote awareness of Jordan's creative industries

A commonly noted problem across all the sub-sectors is that of the lack of a Jordanian creative industries "banner" or brand under which the sector can organise and promote itself internationally and in concert with government. The flipside of this is that there is also a job to be done in promoting the country's creative industries to local businesses and audiences. Key to this is to work on improving the media coverage of the sector in a variety of ways.

- The 'Creative Jordan' brand and platform should be developed, led by the collective industry body. This will be used in international trade promotion as well as through a campaign and set of actions dedicated to improving domestic media coverage of the sector.

4. Pursue education reform

All sub-sectors are concerned with a range of limitations and weaknesses in the country's education system with regards to how it teaches arts and creative disciplines (at all levels).

- The collective body would lead efforts to coordinate and communicate industry concerns – and improvements – regarding the **arts curriculum in the public school system**, as well as working on more detailed education improvement plans for each of the sub-sectors at university level.

5.2 Sub-sector specific solutions:

Below are the sub-sector specific solutions generated through the Phase II research. In order to minimise repetition, where the solutions mentioned in the individual groups are contained within the solutions for the sector as a whole, they have not been described again. Also, solutions that can be achieved in a relatively short timeframe have been indicated as "quick wins".

Audio-visual

Meeting challenge: Greater international exposure for Jordan's audio-visual industries

- Establish a creative/audio-visual marketplace / festival / forum in Jordan: This would invite international/regional talent, be a forum to pitch ideas and promote networking; to §'shop for productions' (currently you need to rely on personal networks), and also to create buzz and excitement. Ultimately, it would stimulate international opportunities for the sector and communicate the value of the Jordanian creative industries to overseas companies and audiences. Alongside a creative market or festival, developing international agreements with existing events and sectors (e.g. with the Dubai film industry) will widen the reach of Jordanian creative industries, and professionals.

Meeting challenge: Increasing awareness and exposure with the local audience

- Create a Jordan 'VIP' film day/night event/ celebration: This would include well known celebrities and/or could be a celebration across the country of cinemas as venues, with cinema programmings other creative activities and events (e.g. DJs, visual arts) around core film events. International models for the latter kind of events exist, such as 'Nuit Blanche' in France, 'Nacht der Museen' in Germany and 'Museumnacht' in the Netherlands. Quick Win!

Meeting challenge: Adapting mind-sets and business models to the new, digital economy

- Develop a space or 'lab' for experimentation in new, cross platform content and business models: this would be a series of short, intensive collaborations involving practitioners from diverse fields, brought together to focus on a particular project or subject (e.g. how to develop non-linear narratives). International models for such programmes exist that could be adapted for the Jordanian context, partners typically involve universities and large technology companies.

- Promote greater use of crowdfunding: Crowdfunding is the practice of individuals pooling their money to collectively support efforts initiated by other people or organisations in return for a pledge in case the project is

successful. Crowdfunding is usually managed via internet platforms and has been used in a wide variety of activities (in the creative industries for example to finance publications or film productions). With the concept of many people contributing a little, this may provide a successful approach to funding Jordanian Creative Industry activities, given the large Middle Eastern market and the high use of the internet particularly among young people. Quick Win!

Meeting challenge: Improving business and commercial skills

- Capacity build supporting services: Local legal and accounting services that are available to audio-visual companies in Jordan need to be improved in areas such as budgeting, planning and exploiting IP assets, which are increasing in importance and complexity in the digital economy.

- Establish a mentoring scheme: There is a lack of awareness of the skills that already exist within the Jordanian industry. Existing skills could be shared via mentoring, for example with young entrepreneurs and start-ups partnered with already established 'mentors' for advice and support. In addition, the internet means that the possibility of international mentoring is now within reach. The collective body/association (possibly supported by the Creative Jordan website) could broker relationships between mentees and appropriate mentors. Quick Win!

Meeting challenge: Low-skilled entrants

- Provide practical 'labs': These would be for young people currently creating micro content (as this is often quite amateurish), and would cover areas such as mastering/editing/post-production/ planning/ scheduling. It would also promote the possibility of developing skills without going to university. This could be done within co-location/ incubator facilities.

Meeting challenge: Greater collaboration and networking

- Create a union of creative industry workers: The union could provide training, payment guidance, and welfare payments.

Meeting challenge: Creating greater awareness of the sector

- Establish a set of industry-owned, creative industry-wide targets: The purpose of these is to create visible, aspirational targets: can the creative industries be a major part of

the Jordanian economy, can they grow the contribution to GDP from 2% to 5% or upwards? This would be part of a wider industrial strategy for the sector.

5.3 Sub-sector specific solutions: Creative Services

Meeting challenge: Working internationally

- Develop international showcasing opportunities: This could be done by participating in international fairs, conferences and festivals as well as by inviting international companies to participate in and demonstrate at events in Jordan. This would also support the sub-sector in staying up-to-date with international standards, a necessity to working successfully on an international level.

Meeting challenge: Creating greater client awareness

- Provide funding support that will encourage clients to 'try out' investing in design/advertising/branding: There has been some success in overcoming businesses' lack of awareness of the added value that creative services can provide through initiatives such as that by JEDCO, which provides funds which contribute towards the cost for companies to invest in design/advertising/branding etc. This lowers the risk for the clients, who are therefore more willing to buy in to such services and in that way, introduces them to the benefits these services bring. As one focus group participant said: "Once they see results, they come back."

- Generate media buy-in, in order to use media to educate prospective clients about the value of creative industries. In other countries this has been usefully done through producing 'factual entertainment' TV programmes, such as the UK's 'Grand Designs' show, which showcases architecture and design in an approachable way that demonstrates their importance to everyday life. Factual entertainment resonates with audiences so broadcasters stand to gain while also educating audiences about the subject matter.

Meeting challenge: Low-skilled entrants

- Change admission policies for creative courses: admission should be based on portfolios rather than school grades, in order to 'catch' those students who are genuinely interested and

talented, and 'weed out' those who are just looking for an 'easy way' to gain a university degree. Quick Win!

- Establish an awards programme for students: to encourage students to do their best as well as to act as a platform to raise awareness of creative courses and their graduates

- Create better connections between students and industry: students currently get only limited access to the industry they are preparing to work in while in education, thereby limiting their practical experience prior to entering the industry. In-house mentoring, placements and company open days could all be introduced and promoted to bridge this gap. Quick Win!

- Review university curricula: curricula need to be reviewed in order to ensure they provide the skills that are required within the industry (for example, design courses currently exclude typography courses – a key requirement for design-based companies)

- Improve link between higher education and the private sector: it is very common in other countries for industry practitioners to advise on curricula in higher education, but there could also be more organised work placements for students so that they work on live projects and gain a stronger understanding of how the industry works commercially.

Meeting challenge: Improving business and commercial skills

- Develop management graduate courses for creative industries practitioners (e.g. within the university system) to enhance business skills across the sub-sectors

Meeting challenge: Improving levels of continuing professional development (CPD)

- Encourage companies to invest in their employees: companies are reluctant to fund CPD of their employees partly because they fear employees will move on too quickly, leaving them with a bill but without benefits. The use of contracts between companies and employees should be promoted that stipulate that where companies pay for training, employees will stay with them for a certain specified time period. Quick Win!

- Consider employee-ownership business models: employees tend to be more motivated and committed to companies in which they have a direct stake, so this would be another way to

sustain and maintain talent within businesses (by promoting businesses' willingness to invest in CPD; by increasing employees motivation to invest in themselves)

Meeting challenge: Improving existing levels of peer-to-peer learning

- Encourage a culture of providing pro-bono skills development opportunities within the sub-sector: businesses which have a certain 'expertise' should be encouraged to offer classes/ master-classes, workshops, mutual knowledge/ skills swaps, 'opening up offices' for mutual support within the sub-sector. A sector body could promote, support and advertise this, or create mutually beneficial connections between businesses. Models exist in other countries where businesses that were unable to pay for external CPD but had different areas of expertise provided 'classes' to each other, engaging in (free) mutually beneficial knowledge swaps. Quick Win!

- Foster international knowledge exchange: rather than focusing only on generating international funding, more could be done to encourage international knowledge exchange. Well established international architecture, design and advertising agencies could be encouraged to visit and share their experiences and knowledge. This would both help them to fulfil their Corporate Social Responsibility requirements, as well as providing enriching professional development experiences for staff.

Meeting challenge: Developing an R&D culture

- Get the government R&D fund used as it was originally intended: Although a government R&D fund exists, this currently tends to be used to fund student bursaries rather than also support R&D in the sector. A sector body could lobby more effectively to government to re-direct the fund to its originally intended purpose.

Meeting challenge: Improving public sector tendering practice

- Lobby Ministry of Public Works to change their procurement regulations: Again, a sector body could more effectively lobby to accept tenders from 'specialist' architecture companies and joint ventures, as well as to change currently existing weighting (for the scoring of tenders) that gives a higher weighting to cost concerns than to the quality of the design, and to introduce a 'level playing field' within

procurement processes, which gives equal chances to all applicants.

5.4 Sub-sector specific solutions: Performing Arts

Meeting challenge: Addressing Jordan's cultural diversity

- Have a week that celebrates the cultural diversity and heritage of Jordan: Jordan's cultural diversity (and consequent diversity in tastes and sensitivities) is currently frequently considered as a 'problem' within the performing arts sectors as it can lead to a lack of respect within audiences and performers of different cultures, accents etc. To counteract this, an event could be introduced to celebrate this diversity, for example by running events that, in contrast, showcase and celebrate particular groups' cultures (e.g. Bedouin art and music, Palestinian art and music etc) or another group.

Meeting challenge: Low awareness and appreciation among audiences

- A major annual event/festival/concert to raise the profile of the performing arts and generate audience and media interest across the country: this could be an event that celebrates Jordan and subverts traditional expectations (e.g. "Living Sea Festival"); a "performing arts road show" with a group of artists who travels from city to city in Jordan, with performers using social media to generate initial publicity, thereby drawing in the traditional media (radio, TV, press) as the impact 'snowballs'.

- More street performances in Amman/ Jordan in order to reach marginalised groups.

- Improve participation in and consequently understanding of, the (performing) arts by creating new learning initiatives for young people: The Jordanian education establishment currently cannot be relied upon to provide adequate education of the performing arts. New (informal) learning initiatives could be established: for example an Afternoon School of the Performing Arts which could take place after-hours at public schools (hence making use of empty space) to host music/art classes run by artists, with a specific curriculum (a suggested name for this was the "School of Happiness" (مدرسة السعادة). This would not have the aim to create great artists – its aim would be to introduce young people to the world of art. Possible parent classes could be introduced to empower/encourage parents to teach children the

importance of the arts. The same could be done in community centres with students. Quick Win!

- Increase media/TV coverage of performing arts: The performing arts sub-sector and the media need to work closer together in order to raise awareness and understanding of the performing arts in Jordan. Jordanian TV stations should be lobbied to present more performing arts, for example by showing short shows that present success stories from the performing arts. A regular radio programme on an existing radio station could be established that celebrates Jordanian's rich cultural legacy. Again, a sector body would be able to lobby Jordanian media more effectively than individual organisations would.

Meeting challenge: Low-skilled entrants

- University teaching staff needs up-skilling – some staff have been in place for many years and have not kept up-to-date with the sector.
- Jordanian higher education needs investment to provide adequate facilities and equipment (e,g. sprung floors to enable the teaching of dance)

Meeting challenge: Improving business and commercial skills

- Provide business skills training: Performing artists frequently suffer from low business and commercial skills/understanding; this should be addressed through the provision of relevant CPD classes, workshops or knowledge-swaps. Quick Win!

Meeting challenge: Improving commercial opportunities to better enable artists to 'make a living' from their art

- Aggregating (smaller) acts and performers e.g. in festivals to counteract the problem that individual gigs are not large enough to attract funding or big audiences. These could be better packaged to both media platforms (e.g. TV) who could promote the event among audiences, and to sponsors, who have the financial muscle to pay performers (c.f. the iTunes Festival model).
- Lobby the foreign cultural institutes to put Jordanian acts in contact with promoters and agents in their countries. In this way Jordanian acts could earn some money (e.g. to cover their living costs beyond accommodation while abroad as these are not covered by international cultural institutes) as well as to increase their profile by

playing smaller shows in local venues abroad, in between/around the one or two bigger shows that have been booked for them through the cultural institute. Quick Win!

- Address the lack of proper laws on the business side of the performing arts: Existing intellectual property laws are currently ineffective, meaning that many performers (particularly in music and TV/film) do not reap the benefits when their work is reproduced. Government needs to be lobbied to further secure and enforce these laws – this would be more effectively done via a sector body.

5.5 Sub-sector specific solutions: Visual Arts

Meeting challenge: Greater collaboration and networking

- The National Gallery could play a role in bringing the sub-sector closer together: As one participant said, "We are all linked by the National Gallery". The National Gallery is considered as the pivotal point in the sector, and therefore as an organisation that should take a leadership role in some of its future development activities. Nevertheless, as one individual organisation, it is recognised that it should not be the collective body that represents the whole creative industries sector. One of the important roles that the National Gallery could play is in supporting the continuing professional development of artists. Quick Win!

Meeting challenge: Low awareness and appreciation among potential art buyers

- Create a flagship art event as a showcase and platform: The big art fair in Abu Dhabi, Abu Dhabi Art Week completely changed the local art scene. This could be a very effective model to re-create in Jordan – it is important to create a model that caters to the local market. Although Jordan does not to the same degree have people who can pay for art as in Abu Dhabi, the 2010 contemporary art fair in Amman clearly showed the success of this model in Jordan as well. It is considered as a very fruitful event, which not only raised awareness, but also vastly contributed to collaboration between artists. If this is to be re-instated, it is important that organisers engage with the art community well in advance of the event (e.g. for the 2010 event, the question "What is art in Jordan?" was posed to all participants, and that feed into developing the programme.)
- Create a high-profile annual art prize: This could

have the potential of attracting high-profile private sponsorship, which could contribute to a cash prize, as well as bringing more prestige and greater marketing and promotional muscle to help attract potential art buyers. This would also create and easy and attractive hooks for the media to cover visual arts.

- Develop a learning/ knowledge-sharing programme on a community basis, e.g. by developing public short art courses for adults and would-be collectors, possibly taught by artists.

Meeting challenge: Low awareness and appreciation among audiences

- Start coordinating/ programming a yearly calendar of activities: This would make sure that gallery events don't overlap (as there is only a small audience), as well as help to identify 'cold spots' in the calendar where events/activities could be developed. Quick Win!

- A major joint annual event/festival/concert to raise the profile of the visual arts, raise sponsorship potential and generate audience and media interest across the country: This should be an event in which a number of galleries participate, thereby enabling joint marketing for which it would be easier to find external sponsor (due to its wider reach). In the past, the international cultural institutes have sponsored such festivals, which worked very well, and they could be lobbied to do so again, but the sponsor could also be from the private sector. Quick Win! One idea would be to establish an annual 'Gallery Night' where all galleries participate and programme special, mixed art form and creative activities to get people to discover galleries and overcome any prejudices as to what these spaces are for. This could be facilitated by the sector body. Quick Win!

- Improve participation in and consequently understanding of, the (performing) arts by creating new learning initiatives for young people: Suggestions brought forward were to i) hold workshops for teachers at the National Gallery, ii) to develop after-school art courses for children (and parents, as art education should be at home too) and iii) establish a school art prize to recognise talent at every level.

- Undertake more community engagement and outreach: More artists should be used to work in community settings, as with recent graffiti projects at the Landmark Hotel or the British Council protection wall, thus creating art directly in the community to generate interest particularly among marginalised groups. On a more complex level, more initiatives such as the National

Gallery's 'art van' that brought art to the regions and led to the discovery of new talents should be supported and promoted. Quick Win!

Meeting challenge: Improving the quality of the visual arts output

- A prestigious annual art prize as described above would not only help to raise awareness and media interest; it would also play a major role in raising aspirations among artists, raising the bar in terms of the quality of Jordanian visual arts outputs and support the recognition of excellence. The prize would be decided by an expert, independent jury.

- Provide short bursaries/residencies for artists (e.g. three months), which explicitly give artists space/ flexibility in which to develop and improve their practice.

- Run curated festivals on themes and attach development activities to these. Improve the quality of curatorship by offering course work at university level.

Meeting challenge: Improving business and commercial skills

- Introduce business modules into existing art degrees

- Develop 'how-to' guides and standard contract templates etc. that improve basic knowledge of how the business side of the visual arts works and provide useful 'tools' that people in the sector can make use of. This could be done by the sector body. Quick Win!

- Specific business needs could be met through experienced individuals in the sector sharing their knowledge through organised 'skills swaps' with others. Quick Win!

Meeting challenge: Improving media coverage of the visual arts

- Re-define and promote art criticism in Jordan: Media, public and the sector needs to learn what 'art criticism' means, i.e. "constructive critique", not just criticism, or a description of events (as is currently often the case). An award for art criticism could be established, possibly targeted at the younger generation of writers, to promote 'art criticism' as a valuable and serious form of journalism. This could be linked to scholarships or bursaries to study/work abroad for a short period. Universities should also be lobbied to introduce Art Criticism as courses in their curriculums – this again would be most effectively done through a sector body.

Meeting challenge: Enhancing chances of participating in internationally funded opportunities for visual artists

- Lobby for the simplification of application processes, and/or provide assistance with the application: Currently, artists who can write proposals and have good English skills are much better equipped to get international funding. A sector body could provide support applicants who struggle with the process on their own. Quick Win!

Meeting challenge: Lack of government promotion and regulation

- Lobby the government to promote the sector internationally, for example by including Jordanian art in international trade shows and, in the case of the Ministry of Tourism, creating brochures/ content on tourism web sites etc that promote not only 'classic' Jordanian tourist destinations but also Jordanian art and culture. This could be done most effectively by a sector body. Quick Win!

- Lobby the government to review current taxation levied on art works. Again, this would be most effective if tackled by a sector body.

- Introduce incentives in the planning system to promote and support (visual) art. There are different models to look at internationally, such as the 'percent for art' scheme in New York for public art, or the UK's 'Section 106 Agreements' that can be used to incentivise a much wide range of community facilities (including both culture and non-culture).

5.6 The role of EUNIC going forwards

The main concern of the Creative Industry participants in the Focus Groups was the need for increasing business opportunities, and access to funds.

The role of EUNIC can be summarised as supporting the creative industries by assisting with: access to markets (regional and European); access to funds (e.g. by raising awareness of small local funding initiatives or advertising EU funding opportunities); capacity building in the arts and in business skills, policy and education advice; and improved marketing and media access through their regional and European networks.

6. Appendix I: sub-sectoral challenges

The sections that follow set out the business challenges identified by the four focus groups. As will become clear, while some challenges are distinct, many others are inter-related. The material below necessarily is a summary of the discussions and outcomes that took place over the half-day sessions.

6.1 Audio-visual

Small domestic market and difficulties exporting /accessing international markets

As with other small countries, Jordan's domestic market on its own is too small to be able to support sustainable audio-visual industries. While exporting may not be sufficient for business success, it is nevertheless necessary. However, there are a number of current challenges to exporting that include: a perceived lack of something identifiable as 'Jordanian culture'; an inability to create stories with universal appeal; and disconnects between writers and other originators of content and companies that are capable of developing them into actual products (e.g. animation, films, games).

Lack of a coherent brand/major promotional platform

As section 2 above demonstrates, Jordan can claim some notable international successes for its audio-visual industries, demonstrating that creative talent exists within the country. However, the sub-sector suffers from not having a recognisable 'brand' or promotional platform that could much more effectively demonstrate the strength of Jordan's audio-visual sector on the international stage.

Funding challenges

This covers a range of distinct issues:

- *Cashflow pressures*: payment is often late but it is also slow given the structure of the industry (e.g. long lead times and payment via royalties)

- *Difficulty obtaining seed and equity finance*: there is a real lack of seed money available and equity-based finance is expensive for entrepreneurs.

- *Exclusion from mainstream government business support initiatives* – these do not extend to the creative industries in general as Intellectual Property (IP) is not classified as balance sheet asset (this is a problem for all knowledge-based businesses in Jordan)

Within the commonalities across the sub-sector, some industry specificities exist in terms of financing structures and opportunities – film and TV in particular have different cycles of production, distribution and the sources of funding are different from the more digital audio-visual industries.

Film-specific

- Limited availability of film production funds in Jordan which necessitates producing (at least) as part of the wider 'Arab' region, as this is the lens through which the industry views Jordan

- No international film co-production agreements are in place

- There is only limited government support for film in comparison to some other countries

TV-specific

- Concentration of production funding for TV: a few high end productions attract the bulk of production funding. This means that artistic standards are rising, as these high end productions set the bar, but outside a handful of productions, the budgets are not sufficient to produce content of this quality.

Adapting mindsets and business models to the new, digital economy

The economy is changing and Jordan's audio-visual companies have an amazing opportunity to harness the potential of the internet – to engage in new ways of financing, but also to access a larger market, with greater ease, than ever before. Jordan therefore needs to be careful that in trying to 'catch-up' with other countries audio-visual sectors, it does not attempt to do so by implementing yesterday's business models. This does, however, require producers and production companies to act in a much more entrepreneurial way, to produce return on investment and not just expect to see (public) funding without strings.

Lack of exposure with the local audience

There is a lack of film 'culture' in Jordan – people no longer go to the cinema and venues are closing

down as people prefer to watch TV and surf the internet instead. But there are other instances from across the creative sector (e.g. festivals) that suggests that Jordanian audiences are still interested in attending communal 'live' events outside the home. Film needs to learn more about what it takes to get Jordanian audiences excited again about going to the cinema.

Low pre- and post-entry skills levels

The subsector is hampered in its development by a low skills levels of those within the industry and those wishing to enter, both with regard to technical/creative and business/managerial skills. This is primarily attributed to an overall lack of appreciation for the sub-sector and its need for well-educated employees, which has resulted in a lack of funding for quality teaching facilities and motivated teaching staff. This is having a serious impact on the international competitiveness of the sub-sector's outputs, as well as on the competitiveness of Jordanian graduates/ professionals in the international audio-visual market.

Pre-entry

- The Film sector particularly suffers from the lack of appreciation of film education – the resulting low level of film education in Jordanian universities is leading to a lack of graduates with the requisite skills (e.g. for audio-visual production). There are not enough professionals in the country who can teach film well or, if they can, would consider teaching film in the current circumstances (lack of funding/ appreciation etc).

Post-entry

- Although generally equipped with basic technical skills, there is a visible lack among professionals of higher level creative/technical skills. In particular, there is a disconnect between technical skills and creative and artistic skills: people can cut film, but don't know about the 'concept' and practice of film editing. This has lead to a lack of qualified technical/ creative 'leaders' within the industry, which in the field of animation, for example, has meant hiring people from abroad at a high cost. A solution will have to be found particularly if the sector is looking to work on an international level. Within the field of TV, which requires some very specific skills sets, this situation means that while the raw talent exists, people often lack the necessary skills for jobs such as live TV presenting.

- People/ businesses in the sector are also hampered by a lack of management and entrepreneurial skills/ business know-how as well as lack of knowledge of relevant supporting industries, e.g. with regard to legal services re IP and contracting – crucial in enabling the monetisation of digital/creative products/services. This means that many at present don't know "how to make money out of their talent".

- In order to widen its talent pool, the Jordanian AV sub-sector needs to be open to other cultures: European support should be considered not just in terms of funding, but in terms of the skills it can share and the access to new industries, funds and markets it can provide.

Lack of collaboration and networking across the AV sub-sector and its individual industries

There currently does not exists any artists association or union for the sub-sector or its individual industries (e.g. no union for independent film makers), resulting in a situation where "everyone works on their own". This means that the sub-sector's networking potential is not used: businesses cannot easily capitalise on the potential from cross-platform franchises (e.g. comics into animation or film) and the situation is stalling the organic spreading/sharing of skills among the different industries and individual businesses.

Lack of awareness of the effect of the geo-political context

The difficult political atmosphere between Israel and other countries in the Middle East has lead to a situation in which any co-operation between Israeli and Arab companies would see products boycotted and creative practitioners ruined. International funders need to understand that they cannot place both in the same funding programmes simply because they are located in the same geographical region.

Other challenges

A lack of speed in the execution of tasks/assignments within the sector is impacting negatively on its competitiveness. This is attributed to various factors, from work ethics to long-winded legal processes, meaning that it will have to be addressed from various sides.

6.2 Creative Services

Small domestic market and low exposure to international markets

All agreed that the overarching challenge for the creative service sub-sector is the small size of the Jordanian market. In addition, the sub-sector faces a lack of exposure to international markets and trends, severely reducing its market size and international competitiveness.

Lack of a coherent brand/major promotional platform to bring the sub-sector together

There is at present no effective association or body to bring the sub-sector or its different industries together. Existing institutions (e.g. The Engineers Association, Interior Designers Association, The Graphic Design Institution etc.) are considered as inefficient (e.g. too broad or too weak, "more like a social club") and as unable to advance the industry and support its development.

This means that there is only limited joint working/ collaboration/ networking taking place, with people often finding it difficult to find the right people to collaborate with. Moreover, the sub-sector as a whole cannot undertake joint lobbying, which would make it a much stronger force than any individual businesses can at present hope to be.

Lack of client/consumer awareness of the value of creative services

The small local market available to the sub-sector is attributed not only to the small size of the Jordanian market in general, but in particular to a lack of understanding of the value of creative services such as design, marketing or architecture among the Jordanian business world and population. There is a pervading perception of "why should I invest in creative services". Two elements need to be addressed in particular:

- *Price competition dominates:* The market is extremely cost-sensitive. Business is seen to go on without design, and even big businesses consider design as cost rather than investment. Where companies do decide to use e.g. advertising agencies, these are often selected on the basis of price (in particular deals on media buying) rather than the quality of the creative campaign. This means that professionals are frequently undercut by less-skilled competitors: Designers are often undercut by freelancers – clients need to be educated about the fact that advertising is not just about the cost of the bill-board; they need to understand the return on investment derived from quality branding and ad campaigns. For architects, a particular problem lies in clients using contractors directly, without consulting architects first. They need to understand that architecture/ design needs to sit 'at the top of the pyramid', and not considered just as a bonus/extra cost.

- *No industry lead body to educate clients:* The current lack of an effective association or body also means there is no entity to educate/ champion the cause among potential clients.

Funding challenges

The sub-sector and its individual businesses are struggling to find sufficient funds to support themselves and be able to grow and further develop, for a number of reasons:

- *Negative investor attitudes and no supporting investment infrastructure:* There are at present no investment funds or accelerators that support new businesses in design, architecture, advertising, branding etc. Alongside this, creative service companies are based on selling people's time, rather than certain products or IP. As this generally means the investment multiplier which external investors can expect is much lower, venture capitalists are generally not interested in supporting such companies. However, this does not mean they are not worthy of investment, and more therefore needs to be done to attract investors who are not only looking for a quick exit and high returns in a short space of time. For example, some CS businesses have managed to secure external (equity) investment from individuals, although this has generally been on the basis of personal connections. There is a feeling that more should be done to celebrate those who do invest in CS companies, in order to make them better known and more approachable across the sector.

- *Banking is a "terrible issue" for all service industries:* As the pay-back time from clients can be very long, putting pressure on service companies' cash flow, banks are generally reluctant to support businesses in the service industries. Some well-established creative service businesses have managed to agree project by project financing with banks to cover cash flow problems; however, this is very difficult to obtain, and at present appears restricted to projects with high profile end clients (e.g. government).

- *No government leadership:* There is at present no national (government) recognition/ leadership of the Creative Industries as an economically productive sector that contributes to employment and GDP. This also means that the government is not actively supporting the export and trade development of the sector at present, for example not including it in international trade exhibitions. However, examples have shown that very little financial support can reap huge benefits (e.g. EUNIC partners have supported Jordanian architects to take part in exhibitions abroad and this has brought tangible business benefits), so this urgently needs to be communicated.

Low pre- and post-entry skills levels

As in the audio-visual sub-sector, the creative services are hampered in developing their businesses and competitiveness by both low pre-entry and post-entry skills levels. This is attributed to a range of reasons:

Pre-entry

- It is at present very difficult for CS companies to find good local architecture and design graduates. The principal reason for this is the declining standard in higher education (someone referred to the situation as "absolute degradation"): Teaching approaches are frequently "pre-historic" and conservative (while creative courses "can't be based on close-mindedness"). There are for example no typography courses within design education; something that should be an essential component of a design degree. International exchange programmes used to exist and were very valuable (e.g. architecture students studying in Germany), but have dried up. These are specific symptoms of the wider economic reality of higher education, which has lead both public and private universities to take in more students to bring down the unit cost of teaching. But as the higher numbers of students has not been met by an increase in teaching staff, the professors are overworked and underpaid; they are not motivated. The remaining good schools and universities are private, but these don't educate the masses, making it impossible to create the necessary volume of talent.

- Due to the pervading lack of awareness of design as a professional discipline, it is difficult to find motivated and talented design students. Design courses have very low admission criteria and admission should be based on portfolios rather than school grades, to avoid them being "the refuge of those who don't want to study". This is presently the case, leading to a "hobbyist ethic" and a lack of application of artistic/aesthetic skills among design students.

- There are presently poor connections between students and industry, with a lack of encouragement, support and placement opportunities for design or architecture students from potential employees. People need to learn to network at a young age to make it in the sector, but at present there are no groups/ associations/ networks within or outside education for young people to join while they are studying.

Post-entry

- There is no culture of peer-to-peer learning present within the industry. Even when approached, people criticise rather than providing 'constructive criticism' – this is unhelpful and de-motivating.

- Designers in Jordan need to learn to work more as 'consultants' – to be aware of the industry clients are working in and understand clients' businesses. This means more research upfront, but many at present do not understand the value added that this brings to their pitch/offer. This lack of understanding of clients' businesses is exacerbated by the fact that many people working in the Jordanian CIs study abroad and have little knowledge of the local Jordanian market.

- Many in the CS don't have the necessary business skills to run a successful business – they don't know about contracts or how to set rates, and are often poor at long term planning. It is very difficult to find people who can run creative businesses commercially, while also understanding the 'creative' side of the creative industries.

- Across the sector there is a lack of investment in skills development by employers. In part, this is due to a lack of trust of companies in their employees, with companies not prepared to invest in their employees in case they leave. Furthermore, companies at present feel that they don't benefit financially from increasing the skills of their employees due to the continued lack of awareness among clients of the importance of these skills (i.e. there is no return on the investment).

No R&D culture across the sub-sector

Across the sub-sector, there is a lack of any type of "R&D culture". The main reason for this is the problem of costs – R&D does not make (immediate) money. While some (government) grants exist to support R&D, these are not channelled into the right directions. This means that it is difficult for companies and entrepreneurs to carve out space for (unpaid) development and innovation.

These 'practical' issues come alongside an underlying mentality issue in the form of a pervading lack of aspiration and understanding of the value of creating new products (linked to a lack of long-term visioning). Businesses are comfortable with what they have – there is an attitude of "why pay money for new things". This is often a management issue – many businesses are family-run and suffer from a lack of professionalism (e.g. a lack of management skills to consider long-term impacts of investing in R&D), as well as from complacency among older business owners who are unwilling to reach outside their comfort zones (while young people might be more open to innovation).

This situation is at present not counter-acted by the Jordanian universities – while many new companies abroad start on campuses, with support from universities and teaching staff (e.g. google or facebook), this does not at present happen in Jordan. In addition, there are no regular

links between industry and academia to improve the flow of knowledge that would be part of the R&D process.

(Public sector) procurement challenges

Tendering practices (in the public sector) are currently focused primarily on cost (with the scoring system undervaluing design and originality in favour of cost) and frequently biased against specialisation, putting stones in the way of more specialised companies. For example, architects are discriminated against (even when tendering as a joint venture with engineers), as government clients want a 'package' and don't accept that architects could lead this process (as opposed to building contractors or engineering firms).

Added to this is a lack of transparency and accountability within (public sector) procurement; companies do not find themselves in a level playing field when pitching, with "behind the scenes" machinations often determining who will be awarded the contract.

6.3 Performing Arts

Jordan's demography and socio-political culture

The performing arts sub-sector is faced by a number of challenges relating to Jordan's current demography and socio-political culture, which can be related to two overarching issues:

- Jordan's audience is a highly diverse one. The country of Jordan is a construct – there is a feeling that the country is on the way to building a national identity, but still lacks a coherent social fabric/ cultural identity. This is a problem for sectors such as the performing arts, which thus need to appeal to a very diverse audience group with different tastes and demands in order to be successful, and need to remain sensitive to the viewers and their sensitivities (e.g. how to behave, move, dress). Nevertheless, it was also felt that "[…] creatives are part of the solution to this."

- Creativity is felt to be inhibited both by (government) censorship and public disapproval, frequently leaving artists wondering "why to bother". Although freedom of expression has improved, certain inhibiting laws remain/ have recently been introduced (e.g. the latest internet law).

- With arts still considered a "social taboo" in many quarters of the Jordanian society, this makes it difficult for artists to know how to communicate with funders and service providers etc. All too

often, they are also left in situations where they are not taken seriously if they say they are an artist/ performer, thus undermining their negotiation abilities.

Lack of awareness and appreciation among the audience

There exists among Jordanian audiences a pervading lack of awareness and appreciation of the performing arts, which the sub-sector is finding it difficult to overcome. This has lead to the feeling among performing artists that "Art starts in Lebanon, develops in Egypt and dies in Jordan". Issues around this originate both on the demand and supply side of the sub-sector:

Demand side

- There are still strong negative audience perceptions attached to the concept of the "performing arts". While audiences may happily go and see a pop star, they will not go and see a "music performance" or theatre as they do not know enough about it and simply think it's "not for them".

- Overall the understanding of the (performing) arts among audiences is very low. Art is almost entirely absent from the curriculum across the education establishment (public/ private; primary/ secondary); it is thought of as something on the side, not taken seriously. This means that young people are only rarely exposed to art.

Supply side

- Government-sponsored art activities are free for Jordanians. While positive on the face of it, subsidised 'free' entry charges also devalue the experience and promote the wrong sort of awareness among audiences, who are being taught that "art is free".

- While more independent performing arts events are starting to happen (in Amman) this has not let resulted in the critical mass of (constantly available) performances required to turn attending into a habit; to make people regularly think "let's go to a live performance". More events need to be programmed and promoted to achieve this. The potential for this exists– bands are coming out, audiences are growing, the young generation is hungry for something different, for alternative art/music. This development should be supported –as one participant said, "What would happen if we had some sort of support programme, to work on performance etc?"

Small domestic market cannot sustain a professionalised, commercial industry

Similar to the above two sub-sectors, the Jordanian performing arts are hampered in their development by the small domestic market, which cannot sustain a professionalised, commercial performing arts industry. As one participant said, "There is nothing that could be called the Jordanian performing arts/music industry. We have individual small successes, but the performing arts sector as a whole; that is a different story." This situation has lead to a number of interlinked issues that are working against the development of a more professionalised industry:

- People often cannot sustain working as artists full time; many have other jobs in addition to their creative work.

- There is a vicious circle with the public generally not perceiving the performing arts as 'business'/ artists as 'business people', and people in the performing arts in turn not behaving professionally (because why should they as they are not getting paid for it?).

- Artists thus frequently only do "arts for art's sake" – they don't do it as a 'business', with the hope to earn money from their art.

- Lacking proper professionalisation, connections ("wasta") go before merit – you need to rely on your own personal contacts to get by, rather than on the quality of your work.

Funding challenges

Similar to the above sub-sectors, businesses/people in the performing arts are struggling to find sufficient funds to support themselves and be able to grow and further develop for a number of reasons:

- *Negative investor attitudes*: There is at present only limited interest among businesses to support arts (either as part of their CSR or for advertising purposes), which in part is due to the lack of popular interest and regard for the arts. If they invest, businesses/investors too often base their decisions on personal connections and popularity, rather than the quality of the work, and support what is already known and popular, rather than emerging artists.

- *No government leadership or effective support:* There is currently no overarching government strategy for the arts (not even with regard to education). While there are certain programmes (e.g. run by the Ministry of Culture), they are considered as not enough and as "just for show"/ to get foreign grants. There is a general feeling that the Ministry of Culture should do more to support the performing arts, but there is a

perception in the sub-sector that those in the public sector who distribute funds for the arts at present have "no idea what they are doing" (for example, insufficient support for youth involvement (e.g. youth theatre), not enough artist residencies).

- *Performing arts businesses suffer from a lack of available revenue funding* (i.e. funding to cover core operating costs, such as salaries, utility bills etc.). While the government seems happy to fund the building of new prestigious buildings, it is not prepared to provide revenue funding to run these venues.

- *There are a number of arbitrary approaches to taxation*, which are proving counterproductive to the development of the performing arts: Government for example taxes musical instruments extremely highly – this reduces demand for instruments, deters people from learning an instrument, and reduces tax revenues due to low sales. Instruments are considered a "luxury". There is an attitude among policy makers of "poor kids are not interested in playing an instrument".

- *Reduced quality of support provided by international organisations:* With local and national government not supporting the arts, many in the performing arts see international organisations such as cultural centres and embassies as their only chance to get support. However, there is a feeling that there has been a "big drop in quality of the policies of international cultural centres in terms of what they offer".

Lack of industry body/ platform to bring the sub-sector together

As in the other sub-sectors, there is currently no umbrella organisation that can bring together the performing arts sub-sector and coordinate programmes such as mentoring or youth education and conduct more effective, joint lobbying etc. This is coupled with (or perhaps results in) a feeling of estrangement within the artist community, where some artists are left "feeling like orphans": "No one respects you, so we aren't friendly. We need more than just one champion/ success story". However, this is starting to change – more collaborations are starting to happen, and this is particularly visible within the more alternative music sphere.

Low pre- and post-entry skills levels

As with the above mentioned sub-sectors, the performing arts are also hampered in their development by both low pre-entry and post-entry skills levels:

Pre-entry

- Higher education institutions are not sufficiently equipped to produce good quality graduates – this is the case both in terms of the quality of the available teachers and the lack of appropriate equipment and facilities (e.g. no university had a sprung floor that could enable the teaching of dance).

Post-entry

- Across the sub-sector, there is a lack of knowledge among individuals and businesses of how to deal with the business side of the performing arts. This reaches down to the most simple, but nevertheless crucial things like basic intellectual property knowledge, who gets credits, etc. This is exacerbated by a lack of trained, properly skilled management people in the performing arts –for example, there are no music tour managers in Jordan at present.

- Alongside this there is a feeling that many in the performing arts suffer from limited creative/ artistic skills, or the confidence to use and expand them. As one participant said, "There is a lack of creativity within us as artists. We don't create, we imitate. We don't have trust or confidence in what we can do! We need to respect ourselves first – and for that we need thinkers and leaders, individual artists."

6.4 Visual Arts

Lack of industry body/ collective action

As in the other sub-sectors, there is at present no industry lead body/association or overarching national strategy for the visual arts sub-sector. As in the performing arts, this is coupled with a 'silo mentality' within the community, where people are often perceived to be selfish and to work only by themselves. These two elements are having a number of negative consequences for the sector:

- There is at present no collaboration of ideas and knowledge to support lobbying, help raise quality and coordinate collective action to speak of.

- There exists a certain defensiveness and insecurity towards artists from different nationalities (e.g. the Iraqi artists coming in to the country), leading to missed opportunities for collaborations, knowledge-sharing and internationalisation.

- The different elements of the visual arts value chain, such as universities, artists, galleries etc. are not working together – a way will need to be found to bridge the gap between them, before the sector can develop further and become more professional.

- The limited collaboration within the community (and lack of any form of organisation) is making it difficult for young artists to get a foothold in the community and know where to seek support and business links (e.g. matters such as how to find an agent).

Lack of business skills and professionalisation

The general lack of business awareness and knowledge among the artist world is proving problematic within the visual arts sub-sector, too. Many artists are ill-equipped to deal with questions such as how to sell their art work, or how to educate people/prospective buyers to understand the value of their art work. This (at least in part) means there is at present a lack of shared norms or consistency across the sector as to prices for artworks (or indeed how to set prices), what to expect from agents and galleries, or how to behave in negotiations and transactions.

The lack of consistency in pricing is proving particularly detrimental, with prospective art buyers insecure about the value of particular art works. These elements are exacerbated by the fact that most artists do not have agents, and that there is at present no culture of galleries supporting or sponsoring particular artists.

Low quality of visual arts output, particularly for international markets

There is a general perception that more needs to be done to review and improve the quality of the visual art created in Jordan, particularly if it is to become successful on the international market – there is a feeling that the quality of the art works has dropped severely since the 1980sand 1990s. In part, this lack of quality is due to the difficult circumstances in which artists find themselves in Jordan – the difficulty of making a living out of art means that art work is often dependent on the personal resources that the individual artists can access. Similarly, this is leading to a situation in which artists "don't take themselves seriously, they don't dare consider themselves as artists" – and this is hampering their professional and creative development. At the same time, there is a feeling that many artists and galleries are concentrating too much on marketing before content – as one participant said, "we need to have quality content first, that will make the marketing much easier".

Jordanian artists are clearly finding it difficult to access international markets at present – for example, one participant raised the question of why they do not get sold at international art fairs like Abu Dhabi. There is insecurity as to why this is – is it because Jordanian artists are not interested, or not

good enough at "getting out", or is it because they are producing the "wrong things", or due to a lack of professionalisation/quality among the Jordanian artist community?

Lack of awareness and appreciation among the audience

Again similar to the above described sub-sectors, one of the overarching challenges for the visual art sector lies in the lack of awareness and appreciation among audiences (and prospective art buyers). This to a large part is due to the lack of visual arts education in public schools – art has been absent from the curriculum since the 1970s. While this is an issue that will ultimately have to be taken up with the Ministry of Education directly, there is a pervading feeling that "we can't rely on the Ministry, we need to do things in the sector ourselves. We need to consider both what is taught, and how".

This situation has led to a limited understanding and, consequently, acceptance of contemporary/conceptual art among the broad population, resulting in the fact that there is at present almost no audience for it in Jordan. A large part of the audience "just does not understand the overall value of arts". This also means that even those who have the means to by art often do so for the wrong reasons, seeing it purely as an investment, and therefore going only for "what they think is valuable" – which is not necessarily related to the quality of the art work in question.

There is a feeling that some sort of flagship event such as an art fair would help to raise awareness, but at present the difficulty lies in finding sponsorship for such an event.

Oft trifft man wen, der Bilder malt, viel seltener wen, der sie bezahlt. (People who paint pictures can often be found; people who pay for them much less often.) *Wilhelm Busch*

Lack of media interest

Alongside the lack of awareness and appreciation among the wider population is a lack of media interest in the visual arts – it is a vicious circle in which the media does not report what the population is not interested in, and the population is not interested in what the media never reports. Media coverage thus urgently needs addressing; however, at present "there is no big art event (e.g. Art Fair) that could generate the required media interest".

Underlying this issue is a lack of strong art critics in the Jordanian media, who could promote art in general, and could help shape opinion on what

is good or bad. Overall, there is a feeling that the intellectual writing culture about art has disappeared – there were intellectual people writing about poetry etc in the recent past, but they are now elderly and there are no young people taking up the challenge and following them. This at least in part is due to the low salaries paid in the media sector, which do not attract young, talented people as well as to emerging more "popular" writing styles. This in effect means that at the moment, "if the artists themselves don't write a press release about their show, nobody writes about it": all that the current 'art critics' do, is just slightly change the press releases that are send them and then print that.

Funding challenges

The current difficulties for artists in finding sufficient funding again spring from a number of different areas:

• *Decline in royal and government support*: Queen Noor is considered as having been a strong patron of the arts through the National Centre for Culture and Arts – this support was important in conferring recognition and legitimacy on the sector, in addition to leading to direct funding. At the same time, government support has all but disappeared with the current government.

• *Difficulty securing private sponsorship and support:* As in the performing arts sub-sector, there is a lack of private support for the visual arts and art education. As the organiser of the 2010 contemporary art fair in Amman said, "Sponsorship was a nightmare, funding was big issue. We approached many patrons but it wasn't an idea that was convincing for many art collectors or patrons. There was a lack of awareness of the importance of arts and culture".

• *The economic downturn is squeezing buyers' budgets:* The general difficult Jordanian economic situation (exacerbated by the international economic downturn) has had a visible effect on the disposal income of potential art buyers, which has been felt by both galleries and individual artists.

6.5 Conclusion: drawing the challenges together

The Pre-focus Group and four Focus Group meetings had common attitudes and themes. One of the foremost comments was that there were limited local business opportunities in the creative industries. These opportunities could only become a reality with a combination of one or more of access to funding, institutional support, technical and business training, and marketing and branding. In addition,

weak or limited education curricula at higher education was also mentioned regularly. Another prevailing comment was that there was already too many studies and reports on improving Jordan in the cultural and creative field. Instead of theory businesses need practical steps to create business.

The cross cutting challenges, not in any priority order, are:

1. *Small domestic market and difficulty accessing international markets.* The demand for some of the products and services of creative industries in Jordan is limited and not growing fast enough to match the capacity of existing businesses in many sub-sectors. At the same time, accessing overseas markets is very competitive and requires funds to market and sustain a company until it begins to generate a return on its investment. Most Jordanian firms are cash strapped and struggle to maintain cash flow. Another factor which may hamper export is that Jordan has not created a recognised brand overseas in the creative industries and cannot rely on a widely-recognised 'Jordan cultural identity'.

2. *Funding.* Most participants complained of cash flow problems and funds needed for marketing and business development. Banking and funders do not recognise the asset value of intellectual property, which often has significantly longer returns on investment than other business sectors. Some specific funding needs are different for each creative sub sector. As one Focus Group participant stated: "Film cannot fit within the AV sector at all because the funding requirements are so different." Government support of the arts is limited and mechanisms such 'percentage for art tax', used as a levy on large-scale property developments in some other countries, does not exist. Finally, some participants voiced the opinion that there had been a noticeable drop in foreign government support of the performing and visual arts.

3. *Skills.* Staff with minimum quality skills are there but not prevalent across all the sub-sectors. They often have basic technical skills or 'raw talent', but do not have the necessary skills to ensure regular high- quality outputs, which need to be obtained through high quality skills training, supervision or support by technical/creative leaders in formal education settings or mentorship programs, or hands-on work apprenticeship. In addition, several comments were made that the performing and visual artists in particular do not have the business skills to run a commercial operation.

4. *Lack of awareness.* Low public awareness impacts each of the sub-groups in different ways. Jordanians are a diverse group in taste but also in purchasing power. For instance, while interest in the Jerash Festival is high, there is limited interest in cinema attendance. While demand for architectural work exists, there is low interest in design work due to a prevailing lack of understanding of the value added that it brings, as well as the widespread availability of 'cheaper options' (low-trained freelancers). This represents a wider trend: cost sensitivity means that the public go without many of the creative services because they are seen as a cost burden rather than an investment. Some of these attitudes stem from education in schools that has not changed much since the 1970s, when art was removed from the public school curriculum. Another reason is the lack of media interest in covering many of the arts and cultural sectors as they assume that it does not attract audience viewership.

5. *Collective Body.* While the needs of each of the four subsectors cannot be similarly met or developed, there are clear synergies that could be delivered by a collective body championing the creative sector. Currently there is no such collective within the creative industries sector, although several successful sector specific bodies already exist in other sectors, such as in IT (INTAJ). Individual practitioners and businesses struggle to enter the market, keep their skills honed and upgraded, and market themselves. The skills needs and operating environment of visual and performing artists are in many ways different from audio-visual and creative services providers. Nevertheless, collaboration across the industry in setting strategy, local networking, training, business skills development, marketing, branding, government lobbying, access to media and education best practices, was seen as beneficial by all groups.

7. Appendix II: Developing the Call to Action

Phase I of this project was a mapping exercise that was conducted in 2012. It sought to survey over 100 stakeholders in Jordan's creative industries, related to supply conditions, demand conditions, the state of supporting industries, business strategy and structure, and the government's role in supporting the sector. In addition, questions on the improvement of the business environment were included. Based on the answers of 64 respondents, and desk research, a report was prepared on the competitiveness of the creative industries. Further detail on the challenges that individual sub-sectors face was done for the film industry using interviews and material from prior research. This research has been drawn upon both for the planning of Phase II, but also in the material used in the opening sections of the report above.

The Phase II research methodology was based on focus groups of stakeholders in four chosen creative industry sub-sectors: Audio Visual, Creative Services, Performing Arts and Visual Arts. These industry groupings encompass the vast majority of the creative industries in Jordan[37].

In order to better prepare for the four groups with the relevant questions and prompts, as well as having a wider spectrum of potential participants, a 'pre-focus group' with 21 individuals drawn from across the four sub-sectors was undertaken. Over two hours, the 17 stakeholders that were present shared in general the business issues facing them. They were also asked to suggest names of firms and practitioners to be invited to the four more in-depth groups. It was planned to invite ten to fifteen stakeholders to each of the four half day round table sessions.

One hundred and twenty three people were contacted by telephone to attend the four groups. This included a cross section of businesses – those well established as well as newer ones. Email briefs were sent to all invitees, and follow-up phone calls were made to ensure maximum attendance. While 40 to 60 invitees were needed, more were invited to cover for inevitable inability to attend due to work pressures.

At the end of the four half-day sessions, 57 individuals had participated, with an average of 14 participants per group. The focus groups were moderated by Dr. Faris Nimry and Richard Naylor from BOP. Participants were taken through a three step process of outlining their current business challenges, what could be the prospective solutions to meeting these challenges, and what were the main issues related to the feasibility of the suggested solutions. A select number of one-to-one interviews were also conducted afterwards by Dr. Faris Nimry with individuals and organisations that were unable to attend the groups.

---

37 The main exceptions to this are Crafts and Publishing. Crafts was not included in the research as there has already been dedicated research, strategy and resources invested into the sector in recent years (e.g. USAid Jordan Tourism Development Project's Handicraft Sector Development initiatives and UNESCO's mapping and assessment of handicraft producers and designers in Jordan in 2010). Publishing was not included in the research given the small size and reach of the sub-sector in Jordan, and the strength of industry competitors in the region.

8. Appendix III: Focus Group participants

We would like to thank the following for taking the time to attend our workshops, and providing the invaluable input on which this report is based.

We would also like to thank the Jordanian National Gallery for offering its space as a venue for the focus groups.

(Organisation or company names are only provided if the information was supplied by the participant.)

8.1 Pre-focus Group

Ahmad Humeid (Syntax Digital)

Bana Fanous (National Gallery of Fine Arts)

Barbara Rowell (Jacaranda Images)

Basel Uraiqat (Atelier Uraiqat)

Basma Uraiqat (Atelier Uraiqat)

Dina Dabbas Rifai (Review Amman/ Fustuq.com)

Fouad Jiryes

Hani Nuaimy

Khaled Khreis (National Gallery of Fine Arts)

Lina Tell (National Centre for Culture and Arts)

Madian Al Jazeerah

Maher Kaddoura

Qais Elias (Al Faridah Group)

Rania Omeish (Al Faridah Group)

Rania Qamhawi (National Centre for Culture and Arts)

Thamer Khawaldeh

Wael Attili (Kharabeesh)

8.2 Audio-visual Group

Ahmad Ameen (RFC)

Baha Othman (RISICA)

Deema Azar (RFC)

Emile Cubeisy (Silicon Badia)

Fouad Jiryes

John Lillywhite

Johnny Dabeet (Fluid)

Lara Ayoub (Ro'ya TV)

Mais Daouad (INTAJ)

Mais Darwazeh

Majd Hijjawi (Labiba Production)

Qais Elias (Al Faridah Group)

Randa Salti

Raed AlNatsheh (Rubicon Holding)

Rula Nasser (Imaginarium Films)

Sawsan Darwazeh (Ma'mal/ Karama Human Rights Festival)

Wael Attili (Kharabeesh)

Zaidoun Karadsheh (Sketch in Motion, Bee Labs and Media Plus)

8.3 Creative Services Group

Ahmad Humeid (Syntax Digital)

Arwa Jassem (Leo Burnett)

Basma Uraiqat (Atelier Uraiqat)

Basel Uraiqat (Atelier Uraiqat)

Dina Dabbas Rifai (Review Amman Fustuq.com)

Haya Majali (TasmeemMe)

Mais Daoud (INTAJ)

Meisa Batahneh (Meisam Architects)

Michel Makdah (Jo Bedu)

Noor el Fadl (TasmeemMe)

Rania Omeish (Al Faridah Group)

Randa Jabaji (Design Institute Amman)

Randa Salti

Shereen Nababteh (Memac Ogilvy & Mather Jordan)

8.4 Performing Arts Group

Ahmad Sror (Street Theatre Group, actor)

Alaa Qaraeen (Reach 2.0)

Baha Othman (RISICA)

Shima Tell (Visions Theatre Group)

Ihab Abu Hammad (Orange-Red events)

Joyce Al Raie (University of Jordan)

Russol Al Nasser (Rum Group)

Yacoub Abu Gosh

Zain Awad

8.5 Visual Arts Group

Abeer Seikaly

Ala Younis

Bana Fanous (National Gallery of Fine Arts)

Barbara Rowell (Jacaranda Images)

Fad Skeeiker (University of Jordan)

Linda Al Khoury (Darat al Tasweer)

Maral Tajirian (QoDE)

Mohammad Shaqdih (Darat al-Funun)

Mustafa alYousef

Nadia Zacharia (Nabad Gallery)

Ousama Ghannoum (Saraya Holdings)

Rami Haddad (University of Jordan)

Randa Salti

Rania Omeish (Al Faridah Group)

Reem Hourani (Foresight Gallery)

Salam Kanaan (Duinde Art Gallery)

Samia Zaru

Sara Abu Alia (Art Medium)

Sina Ata