

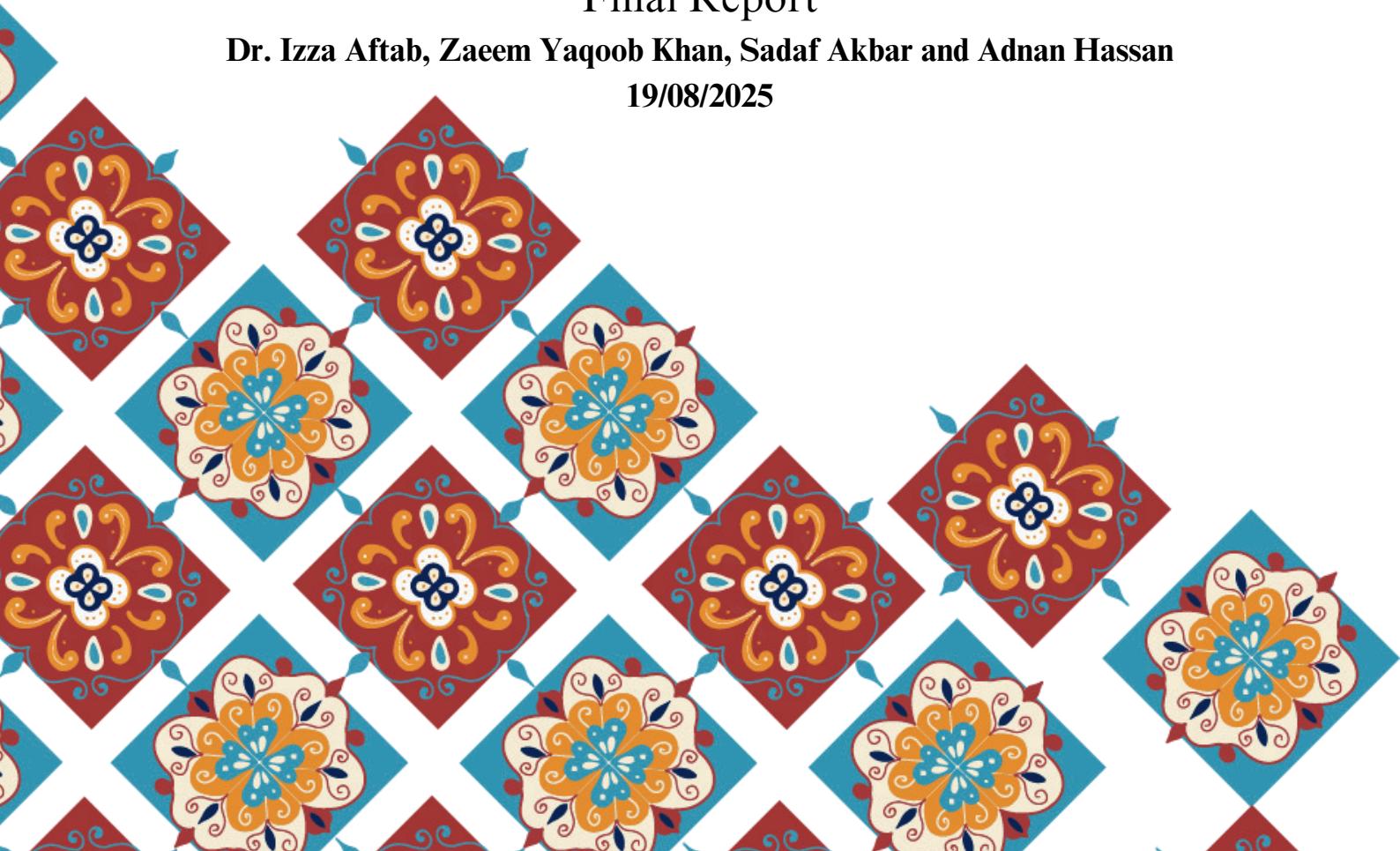


IMPROVING DATA COLLECTION AMONG NATIONAL AND PROVINCIAL STATISTICAL AGENCIES TO STRENGTHEN POLICY MAKING FOR THE CULTURAL AND CREATIVE INDUSTRIES

Final Report

Dr. Izza Aftab, Zaeem Yaqoob Khan, Sadaf Akbar and Adnan Hassan

19/08/2025



BEACONHOUSE NATIONAL UNIVERSITY

This report presents three supporting chapters that collectively advance understanding of Pakistan's cultural and creative industries (CCIs). The Field Narrative chapter documents the national rollout of revised survey instruments across five provinces and six sectors—textiles, artisans, food, festivals, music, and gaming—detailing sampling, enumerator training, ethical considerations, and field challenges. The Descriptive Data Cleaning & Analysis chapter outlines data validation processes and provides sector- and province-level insights into the economic and social dynamics of CCIs. The

National Conference chapter summarizes the proceedings of “Culture: The Creative Engine of Economic Growth,” which brought together academics, policymakers, and practitioners to situate CCIs within Pakistan’s broader development agenda. Together, these documents provide an empirical, analytical, and institutional foundation for integrating CCIs into national policy and future research.

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communications@bnu.edu.pk

Designed by:

HANEEN MIRZA

HAMZA SOHAIL

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Chapter 01: Implementation and Field Findings from the National Rollout of Revised CCI Survey Instruments

1.1 Introduction

This chapter presents the rollout phase (Activity 3.1.5) of the revised field survey developed under the project titled “Improving Data Collection Among National and Provincial Statistical Agencies to Strengthen Policymaking for the Cultural and Creative Industries”, funded by UNESCO’s International Fund for Cultural Diversity (IFCD). It builds directly on the assessment and pilot testing completed during earlier project phases, marking a transition from instrument validation to full-scale deployment. The primary objective of this phase was to operationalize refined survey tools across a broader geographic spectrum to capture robust, disaggregated data on Pakistan’s cultural and creative industries (CCIs).

Building upon the foundational pilot study—which covered preliminary field-testing of instruments across six key domains: **textiles, artisans, gaming, food, festivals, and music**—this phase expands the reach and application of the tools to multiple urban and semi-urban districts across all five provinces: Punjab, Sindh, Khyber Pakhtunkhwa (KP), Balochistan, and GilgitBaltistan. The survey tools were improved based on field observations, respondent feedback, and enumerator debriefs from the pilot phase. Key improvements were made to question phrasing, logic flows, and domain specificity to better reflect the sectoral and regional heterogeneity of Pakistan’s CCIs.

The rollout was carefully designed to maximize representativeness while maintaining logistical feasibility. It aimed to:

- **Validate the revised tools** across diverse cultural, economic, and institutional settings;
- **Refine survey strategies** for enumerator training, respondent targeting, and data quality assurance;
- Capture regional nuances in CCI operations, challenges, and contributions to local economies;

- And generate **actionable evidence** to inform national and provincial policymaking.

This phase supports UNESCO's broader mandate of promoting cultural diversity and fostering inclusive cultural policymaking. By documenting CCI dynamics at a granular level, the survey enables a clearer understanding of the economic footprint and institutional needs of creative actors—many of whom remain underrepresented in formal datasets and overlooked by policy frameworks.

1.2 Preparatory Phase: Instrument Revision and IRB Approval

This section details the structured preparatory activities, methodological refinements, and logistical planning undertaken for the comprehensive rollout of the revised survey instruments developed under Activity 3.1.5. The operational execution of this phase was methodically organized, guided by established research methodologies and consistent with UNESCO's standards for ethical research, cultural sensitivity, and context specificity.

Prior to initiating fieldwork, substantial efforts were devoted to refining and finalizing the survey instruments. Drawing upon extensive feedback from the pilot phase, questionnaires were carefully revised to improve clarity, logical coherence, and contextual appropriateness. Emphasis was placed on linguistic accessibility, leading to a professional translation of the finalized questionnaires into Urdu (Pakistan's national language). Translation quality was ensured through iterative reviews, cross-verification with domain experts, and semantic alignment with the original English instruments. It was also crucial to ensure respondent comprehension, accuracy of responses, and enhanced engagement in diverse regional contexts.

Both English and Urdu versions of the revised survey instruments were then submitted for ethical clearance, receiving formal Institutional Review Board (IRB) approval. To ensure transparency and methodological rigor, copies of both the English and Urdu survey instruments, along with the IRB approval documentation, can be accessed here:

- Finalized Survey Instruments (English): [Final Survey Instruments](#)
- Finalized Survey Instruments (Urdu): [Translated Instruments - Final Copies](#)
- IRB Approval Letter: [IRB Approval for Survey Rollout.jpg](#)

1.3 Sampling Strategy and City Selection

The rollout phase covered **250 surveys across 17 cities**, selected to ensure representation across all five provinces—Punjab, Sindh, Khyber Pakhtunkhwa (KP), Balochistan, and Gilgit-Baltistan. Surveys were stratified across six key sectors: **Textile (55), Music (50), Festivals (21), Artisan (40), Food (71), and Gaming (13)**. This sample was structured to reflect the economic weight, cultural richness, and geographic diversity of Pakistan's Cultural and Creative Industries (CCIs). ([Refer to Table 1](#))

Table 1: Sector-Wise Distribution of Completed Surveys

Sector	Surveys Completed
Textile	55
Music	50
Festivals	21
Artisan	40
Food	71
Gaming	13
Total	250

1.3.1 City Selection Criteria

Cities were strategically selected based on a rigorous analytical process grounded in established economic and statistical methodologies. The selection leveraged robust secondary data sources, including the Household Integrated Economic Survey (HIES), Labour Force Survey, and relevant industry reports, ensuring evidence-based prioritization. Key criteria informing city selection included:

- **Sectoral Significance and Economic Contribution:**

Cities with documented economic prominence and significant contributions within targeted CCIs—namely textiles, music, festivals, artisans, food, and gaming—were prioritized.

- **Employment Density in Creative Occupations:**

Preference was given to districts exhibiting higher densities of employment within creative and cultural sectors, particularly among the economically active population (ages 18–59).

- **Regional and Cultural Diversity:**

Additional cities were purposefully selected to ensure comprehensive geographical representation, thereby capturing local economic dynamics, regional cultural heritage, and the presence of smaller or less-documented markets.

- **Logistical Feasibility and Accessibility:**

Practical considerations, including physical accessibility, availability of enumerators, security conditions, and local community receptiveness, significantly influenced the final city selection.

1.3.2 Finalized Survey Locations

Based on the above criteria, the following cities were selected in respective provinces:

Punjab

Lahore

As Pakistan's cultural capital, Lahore hosts numerous festivals, music institutions, design hubs, and artisanal centers. The city is also home to academic institutions, heritage architecture, and a robust textiles ecosystem—making it a nucleus for multi-sectoral CCIs. Lahore is the capital city of Pakistan's most populous province.

Faisalabad

A major textile hub, Faisalabad was selected due to its dominance in weaving, dyeing, and apparel production. It also supports adjacent artisan communities, though traditional crafts are increasingly mechanized—a dynamic explored during fieldwork.

Multan

Known for its blue pottery, embroidery, and Sufi music heritage, Multan bridges historical craftsmanship with contemporary food-based CCIs. Its selection aimed to capture culturally rooted artisan activity and evolving commercial networks. The selection also intended to capture the regional differences in Punjab; to proxy for the heterogeneity of peoples and culture of the province.

Bahawalpur

Bahawalpur's proximity to the Cholistan Desert and its integration of folk music, camel festivals, and handcrafted textile traditions made it a key site for understanding community-driven cultural production outside major urban centers.

Islamabad/Rawalpindi

These twin cities were selected for their mix of formal creative institutions (e.g., Pakistan National Council of the Arts (PNCA), Lok Virsa) and emerging creative startups. The cities also reflect unique patterns in the gaming and design sectors, offering insights into evolving digital CCIs.

Table 2: Sector-Wise Survey Distribution Across Punjab and Islamabad/Rawalpindi (n = 73)

Sector	Lahore	Faisalabad	Multan	Bahawalpur	Islamabad/Rawalpindi	Subtotal
Textile	5	6	3	4	2	20
Music	3	2	2	2	1	10
Festivals	2	1	1	1	0	5
Artisan	2	1	2	2	1	8
Food	6	4	4	3	3	20
Gaming	8	-	-	-	2	10
Total	26	14	12	12	9	73

Sindh

Karachi

As Pakistan's economic hub, Karachi boasts the country's largest concentration of music studios, food entrepreneurs, digital creatives, and textile exporters. Its selection was crucial for mapping institutional disparities and the diversity of urban creative economies. Karachi is Pakistan's largest city.

Hyderabad

Hyderabad was chosen for its strong representation of Sindhi culture, local crafts (*Ajrak*, bangles), and music traditions. It also serves as a gateway between metropolitan Karachi and interior Sindh, offering a mid-scale urban CCI perspective.

Sukkur

This city provided access to Sindh's northern cultural economy, with strong artisan practices, food vendors, and emerging textile trades. Sukkur's location along trade routes also allows observation of mobility in cultural labor markets.

Larkana

Selected for its proximity to Mohenjo-Daro and active cultural preservation networks, Larkana offers insights into heritage-based CCIs. It also plays host to traditional music and festival activities rooted in community structures.

Table 3: Sector-Wise Survey Distribution Across Sindh (n = 57)

Sector	Karachi	Hyderabad	Sukkur	Larkana	Subtotal
Textile	10	1	3	1	15
Music	6	1	1	2	10
Festivals	2	1	1	1	5
Artisan	3	2	1	2	8
Food	7	4	3	2	16
Gaming	2	1	-	-	3
Total	30	10	9	8	57

Khyber Pakhtunkhwa (KP)

Peshawar

With its rich heritage in music, food, and craft (e.g., *Chappal* making and stone carving), Peshawar reflects the resilience of CCIs amidst socio-political transitions. It serves as a gateway to KP's broader creative networks. Peshawar is the capital of KP.

Mardan

Chosen for its blend of traditional crafts and emerging youth-led creative enterprises, Mardan is illustrative of smaller urban centers adapting to modern production methods while retaining cultural integrity.

Abbottabad

Selected for its artisan community and proximity to tourist activity, Abbottabad also has educational institutions supporting creative work in music and crafts, allowing for examination of semi-formal sector dynamics.

Swat

Renowned for wood carving, embroidery, and folklore, Swat offered a culturally distinct environment shaped by historical isolation and revival of CCIs through peace-building and tourism efforts.

Table 4: Sector-Wise Survey Distribution Across Khyber Pakhtunkhwa (n = 46)

Sector	Peshawar	Mardan	Abbottabad	Swat	Subtotal
Textile	3	2	1	2	8
Music	6	1	2	1	10
Festivals	2	1	1	1	5
Artisan	3	2	1	2	8
Food	6	2	3	4	15
Gaming	-	-	-	-	0
Total	20	8	8	10	46

Gilgit-Baltistan (GB)

Gilgit City

Gilgit's cultural economy is grounded in mountain music, indigenous textiles, and community-led festivals. It was selected for its role as a regional administrative and creative hub.

Skardu

Known for handmade woolen products, culinary traditions, and festivals tied to seasonal cycles, Skardu adds dimension to the understanding of CCIs in remote, tourism-dependent contexts.

Hunza/Karimabad

Hunza was selected due to its blend of heritage preservation and modern creative entrepreneurship, including digital artisans and local food brands. Its literacy levels and community engagement provided valuable survey conditions.

Table 5: Sector-Wise Survey Distribution Across Gilgit Baltistan (n = 36)

Sector	Gilgit City	Skardu	Hunza/Karimabad	Subtotal
Textile	2	1	2	5
Music	4	4	2	10
Festivals	1	1	1	3
Artisan	3	3	2	8
Food	4	3	3	10
Gaming	-	-	-	0
Total	14	12	10	36

Balochistan

Quetta

Quetta represents the artisanal heartbeat of Balochistan—particularly in embroidery, leather, and rug weaving. It also hosts significant music and food culture, despite infrastructural and regulatory constraints.

Table 6: Sector-Wise Survey Distribution Across Balochistan (n = 38)

Sector	Quetta
Textile	7
Music	10
Festivals	3
Artisan	8
Food	10
Gaming	-
Total	38

1.3.3 Sampling Approach

A purposive sampling approach was implemented, allowing the research team to target respondents based on specific criteria relevant to each sector. This ensured comprehensive representation of diverse enterprise structures—ranging from informal and small-scale artisans to formalized medium and large-scale creative enterprises. This method was particularly suited for capturing nuanced insights into economic contributions, regional disparities, and sector-specific challenges.

To maximize methodological rigor and practical feasibility, survey quotas were strategically allocated:

- **Economic Significance and Sectoral Weightage:**

Major urban centers such as Lahore, Karachi, and Faisalabad received proportionally higher survey allocations due to their outsized contributions to national and provincial economies within the CCIs.

- **Regional Representation and Smaller Markets:**

Cities such as Sukkur, Larkana, Mardan, Skardu, and Bahawalpur were allocated sufficient samples to provide meaningful insights into regional differences and localized economic dynamics, despite their comparatively smaller economic scales.

1.3.4 Adjustments for Operational Realities

The sampling strategy incorporated flexibility to accommodate field-level constraints, including:

- **Accessibility and Security Considerations:**

Survey quotas were occasionally adjusted to account for security conditions, road accessibility, and enumerator safety.

- **Respondent Availability and Willingness:**

Field teams adapted sampling and interview schedules to accommodate respondent availability, particularly within sectors characterized by informal or irregular business hours.

Overall, this systematic approach to city selection and purposive stratified sampling has provided robust and contextually nuanced data, effectively capturing the complexity and diversity inherent within Pakistan's cultural and creative sectors.

1.4 Enumerator Training and Field Protocols

The rollout phase demanded a robust framework for enumerator preparation to ensure methodological consistency, ethical compliance, and data quality across all provinces. Given the geographical breadth and sectoral diversity of the Cultural and Creative Industries (CCIs) under study, enumerator training and field protocols were treated as a critical pre-implementation stage rather than a procedural formality.

1.4.1 Recruitment Strategy and Rationale

Enumerator recruitment was guided by three primary considerations:

1. **Regional Familiarity** – ensuring that enumerators possessed an intrinsic understanding of context: local socio-cultural;
2. **Language Competency** – enabling smooth communication with respondents in Urdu, and English, and regional languages;
3. **Sectoral Sensitivity** – recognising that sectors such as gaming, festivals, and artisan crafts each require tailored approaches to engagement.

To operationalize these principles, recruitment strategies were region-specific. In KP and GB, enumerators were sourced through collaboration with the **Department of Development Studies, COMSATS University, Abbottabad Campus**, leveraging alumni and students with prior exposure to field research.

In Balochistan, the field team operated under a deliberately lean structure, comprising only two members. To maximize efficiency, the senior team member functioned as both supervisor and enumerator, ensuring quality control while directly administering surveys. This dual-role approach was critical in maintaining oversight in a province where logistical constraints and limited personnel resources required streamlined operations.

In Punjab and Sindh, enumerator recruitment prioritized local candidates to combine logistical efficiency with deep familiarity of the province's commercial and cultural landscape.

1.4.2 Training Structure and Curriculum Development

The training process was designed as an iterative capacity-building exercise rather than a one-off orientation. Two remote training sessions were delivered, each structured to progressively build enumerator competence.

- The **first session** introduced the overarching research objectives, survey structure, and sectoral nuances of the CCIs. Emphasis was placed on **cultural sensitivity**—particularly in engaging with respondents from informal or trust-based networks—and **ethical considerations**, ensuring that all enumerators understood respondent rights and the voluntary nature of participation.
- The **second session** focused on **practical administration**, including instrument navigation, probing techniques, and strategies for handling sensitive financial questions. Drawing on feedback from the pilot phase, this session deepened coverage of trust-building techniques and clarified modules that had previously caused respondent confusion.

The curriculum incorporated both theoretical and applied components, using role-play exercises to simulate respondent interaction, and scenario-based problem-solving to prepare enumerators for likely field challenges.

1.4.3 Ethical Protocols and Consent Management

Ethical compliance was embedded at every stage of the training. Enumerators were instructed to explicitly inform respondents of:

- the **voluntary** nature of participation;
- the **confidentiality** of all responses; and confidentiality
- their **right to refuse** any question or withdraw from the interview at any stage.

Consent was typically documented through signed physical forms. In cases where respondents expressed discomfort with signing—often due to apprehensions about regulatory scrutiny—enumerators were trained to provide additional verbal assurances and proceed only with explicit verbal consent. For online interviews, an email invitation containing the consent form was issued, and participation proceeded only after digital acceptance.

Consent form: [Research_consent_form_IFCD_Survey Rollout Phase. pdf](#)

1.4.4 Field Protocols and Implementation Considerations

Data collection protocols were adapted to both the logistical realities and the profile of each sector. Face-to-face interviews, conducted with paper-based forms, constituted the primary mode of administration. Online interviews were reserved exclusively for the gaming sector, whose respondents typically operate in digital workspaces.

To minimize respondent fatigue and misreporting, enumerators were instructed to:

- use simplified explanations for numeric and technical questions;
- adapt terminology to local language equivalents where needed; and
- sequence questions in a way that maintained conversational flow while preserving the integrity of the survey structure.

1.4.5 Quality Assurance Framework

To safeguard data integrity, enumerators were trained to conduct **real-time completeness checks** before leaving the interview site, clarifying ambiguous responses on the spot. Supervisors conducted periodic reviews of completed questionnaires to ensure internal consistency, particularly for financial and employment data that could be prone to recall errors.

1.5 Provincial Rollout Overview – Preliminary Field Insights

The rollout phase, extending across both urban and semi-urban contexts in Pakistan, provided a critical opportunity to evaluate the operational feasibility of the revised survey instruments while capturing the lived realities of cultural practitioners in diverse settings. Field observations, combined with enumerator debriefs, reveal a set of recurring themes that speak to both methodological robustness and persistent barriers to comprehensive data collection.

1.5.1 Respondent Accessibility and Sectoral Reach

In multiple districts, particularly Lahore, Bahawalpur, and Multan, enumerators encountered significant challenges in securing respondent participation. Business owners and workers were often unavailable during survey hours or hesitant to commit the necessary time. These difficulties were most pronounced in the **music** and **artisan** sectors, where informal working arrangements, fluid schedules, and non-centralized operations complicated outreach.

In Faisalabad, where artisanal production has shifted from traditional, hand-based methods to mechanized manufacturing, enumerators struggled to identify eligible respondents matching the study's intended profile, frequently encountering retail outlets or machine operators instead.

1.5.2 Consent and Confidentiality Concerns

Concerns around data privacy emerged as a consistent barrier in cities such as Quetta, Multan, Bahawalpur, and Hyderabad. Respondents were often reluctant to sign consent forms, share mobile numbers, or allow photographs/thumbprints. This hesitancy was linked to fears of regulatory monitoring or potential tax scrutiny. In these contexts, enumerators devoted considerable time to building trust, explaining the voluntary nature of participation, and clarifying the academic and non-regulatory purpose of the UNESCO-aligned research.

1.5.3 Financial Disclosure Reluctance

Across sectors, the disclosure of income, expenditure, and employment-related figures was met with reluctance. For example:

- **Food sector respondents** in Karachi and Quetta expressed unease in quantifying revenues or pricing structures.

- **Artisan workers** in Bahawalpur often avoided specifying wage or profit margins.
- **Festival organizers** in Gilgit-Baltistan found it difficult to detail budgets or funding sources due to the informal and often in-kind nature of their operations.

In Faisalabad and Rawalpindi, retail operators struggled to provide accurate unit production or sales figures, underscoring limitations in recordkeeping within informal enterprises.

1.5.4 Cognitive and Time Burden

The survey length and detail generated fatigue among respondents in nearly all regions. This was particularly evident in Gilgit, Skardu, and Hyderabad during modules on exports, cost structures, and employment breakdowns. In Bahawalpur, enumerators reported visiting 10–15 shops before finding a cooperative respondent, with many declining participation after learning about the time required.

1.5.5 Logistical and Environmental Constraints

Field teams faced additional operational hurdles:

- **Sukkur** experienced road blockages, delaying scheduled interviews.
- **Lahore, Islamabad, and Rawalpindi** required additional coordination for access to high-security or high-traffic retail zones, leading to rescheduling and reduced coverage efficiency.
- In dense markets of Lahore and Karachi, enumerators often faced heat stress, crowding, or limited time windows as business owners were preoccupied with customers.

- We engaged fruitfully with relevant bureaus of statistics in Pakistan's larger provinces- Punjab and Sindh. Despite best efforts, including participation in our stakeholder sessions, feedback on our survey instruments, the both bureaus could not facilitate data collection. This was on account of two primary factors - competing priorities for the bureaus and budgetary constraints. We decided on completing data collection ourselves to prevent major delays in the completion of this project. In our engagement with the bureaus, at the highest level, we offered to cover the cost of logistics and training to the bureau staff. While initially we expected matters to go through, we adapted our strategy in line with our commitment to completing the project on time. For this to successfully take place, our senior researchers played a crucial role in recruiting and training our own enumerators for data collection.
- We had to recruit a new senior researcher for field work as the prior hire, who was part of our team during the pilot stage, moved to the UK for graduate studies. We experienced a delay as we looked for the right candidate to take over the work. Our efforts paid off as the new hire played a critical role in adapting to the situation where we could no longer rely on provincial bureaus to assist us with data collection.
- We experienced a slow down in data collection and field work during Ramadan 2025 (March 2025) and the following public religious holidays that mark the end of the month of fasting. Our work resumed after the first week of April 2025.
- In May 2025, there was an armed conflict between India and Pakistan. This understandably led to delays as academic institutions were shut down by the government to prevent loss of life. As this project is hosted by Pakistan's leading university, we agreed and cooperated with government orders. Even post-conflict, there was a lag in resuming full scale operations. The conflict also resulted in power and internet outages, constrained mobility which exacerbated the workflow. Despite that, we made up for lost time in summer 2025.
- Similarly, we experienced work stoppages for other public religious holidays including Eid al Adha (early June 2025) and Ashur which marks the beginning of the Islamic calendar (July 2025). In the first ten days of the first month of the Islamic calendar, Muharram, there are mobility constraints and internet blackouts necessitated by security conditions.

- Despite the delays and work stoppages, we successfully completed all deliverables including hosting the conference, completing nationally comprehensive data collection, data analysis and completing reporting requirements for this project.

1.5.6 Behavioral and Safety Considerations

In rare instances, enumerators encountered respondents whose behavior was dismissive or confrontational. One notable example involved a music-sector interview in Islamabad that was terminated early due to respondent resistance, highlighting the importance of enumerator safety protocols.

1.5.7 Recommendations Emerging from Field Practice

Despite the operational challenges, enumerators demonstrated adaptability and perseverance.

Feedback from the ground suggests:

- **Transitioning to digital data collection** in future phases to reduce manual workload and enable real-time validation.
- **Sector-specific tool simplification** to reduce respondent burden.
- **Enhanced regional language translations** to improve comprehension, especially in Sindh and Gilgit-Baltistan.
- **Clearer segmentation of questionnaires** for enterprise owners versus individual creatives or employees.

1.6 Summary of Respondent Feedback (Sector-Wise)

The final rollout of the revised survey across the six cultural and creative industry (CCI) domains revealed clear patterns in the types of information respondents found easier to provide and the areas where disclosure or recall posed difficulties. These sector-level accounts synthesize the feedback recorded by enumerators during data collection, capturing the operational realities encountered in diverse regional and sectoral contexts.

Textile

Textile-sector respondents were generally willing to discuss their craft processes, materials used, and market channels. However, many were reluctant to share precise financial figures, including revenue, profit margins, or employee wages. In Faisalabad and Bahawalpur, operators found it difficult to estimate annual production volumes or total sales, often due to the absence of formal recordkeeping. Locating handcraft-based textile producers was also challenging, as much of the sector has shifted toward mechanized production or retail operations.

Artisan

Artisan respondents often required additional explanation of survey terms, particularly those related to costs, pricing, and business classification. In Multan and Hyderabad, enumerators noted that several respondents were hesitant to disclose income or expenses. The overlap between artisan and textile production—particularly among producers working with fabrics—made categorization challenging in some cities, requiring careful clarification during interviews.

Food

Respondents in the food sector were generally easier to reach in urban commercial areas but showed hesitation in sharing financial data, particularly in Karachi and Quetta, where concerns about taxation and regulatory follow-up were frequently voiced. Questions related to imports and exports were often marked as not applicable, as most operations catered to local or domestic markets. Several respondents described their businesses as seasonal, making it difficult to provide consistent annual estimates.

Festivals

Festival organizers often struggled to recall accurate figures for audience sizes, budgets, and funding sources. In Gilgit-Baltistan and Peshawar, some respondents cited security challenges and limited public-sector support as significant constraints on event organization. Many community-led or informal festivals did not operate within revenue-generating models, which meant sections of the survey related to income and expenditure were often left blank.

Music

Individual musicians frequently found certain sections of the survey—particularly those focused on staffing, distribution, and intellectual property—more relevant to formal institutions or production companies than to their own work. In Lahore and Karachi, several respondents spoke about the irregular nature of performance opportunities and the lack of formal contracts, which made it difficult to provide stable income or employment figures. Limited representation of women in the sector was also noted during interviews.

Gaming

Respondents noted that the survey tool needs to be more inclusive of the diverse components of the gaming ecosystem, including design, development, storytelling, animation, publishing, and eSports. Many felt the current questionnaire was overly generalized and lacked the granularity needed to reflect the creative, technical, and commercial layers of the industry. Across cities, there was consistent feedback that the gaming sector in Pakistan is growing but lacks institutional recognition.

1.7 Conclusion

The national rollout of the revised CCI survey instruments under Activity 3.1.5 represents a significant step toward building a credible empirical foundation for cultural and creative industry policymaking in Pakistan. By operationalizing tools refined through pilot testing and applying them across a broad geographic and sectoral spectrum, the exercise has both validated the methodological soundness of the revised instruments and revealed the persistent structural and behavioral challenges that impede comprehensive data collection in the sector.

Field execution demonstrated that the survey framework is broadly functional and adaptable across diverse cultural, economic, and institutional contexts. Enumerator training, ethical protocols, and context-sensitive engagement strategies were critical in securing respondent cooperation and maintaining data quality, particularly in sectors and regions marked by high levels of informality. The purposive stratified sampling approach ensured adequate representation of both high-concentration creative hubs and smaller, under-documented markets, thereby capturing the breadth of Pakistan's CCI landscape.

However, the rollout also underscored systemic barriers to reliable measurement. Reluctance to disclose financial data—rooted in taxation concerns, mistrust of official processes, and absence of formal recordkeeping—was consistent across all six domains. Instrument–sector misalignments, particularly in festivals and gaming, indicate the need for more modular, domain-specific survey design. Recall difficulties, language barriers, and respondent fatigue point to the necessity of further simplifying and localizing survey tools.

Importantly, the sectoral feedback illuminates patterns that have macroeconomic implications:

- Informality and under-reporting risk underestimating the sector's true economic footprint in national accounts.
- Sectoral definitional overlaps complicate statistical classification, affecting both comparability and policy targeting.
- Emerging industries such as gaming remain institutionally invisible despite clear growth trajectories.

Overall, the rollout has delivered on its immediate objectives—validating the revised tools, refining field protocols, and producing a rich dataset that reflects the operational realities of CCIs across Pakistan. The findings also lay a clear path forward: future data collection must be more granular, trust-enhancing, and sector-specific, supported by institutional mechanisms that recognize the diversity and informality of the creative economy. Addressing these needs will be critical to positioning the CCIs as a measurable and policy-relevant component of Pakistan’s economic and cultural development agenda.

Chapter 02: Data Cleaning and Analysis

2.1 Data Cleaning and Quality Assurance

Following the successful completion of the national rollout of the revised CCI survey instruments, the next critical phase involved data cleaning and quality assurance. This stage was essential to transform the raw field data—collected across 250 surveys in 17 cities—into a validated, internally consistent, and analysis-ready dataset capable of supporting robust sectoral and cross-regional comparisons.

Given the diversity of operational contexts, the high degree of informality among respondents, and the multi-sectoral coverage of the survey, the cleaning process required a **multi-layered approach** combining automated checks, manual review, and iterative consultation with the field teams. The primary objectives were to:

- Identify and correct inconsistencies in numeric and categorical responses.
- Address missing or incomplete data, applying documented imputation protocols where appropriate.
- Standardize terminology, units of measurement, and coding structures to ensure comparability across sectors and regions.
- Preserve respondent confidentiality while ensuring data usability for policy and research purposes.
- Document all modifications for methodological transparency and replicability.

The cleaning process was guided by UNESCO's principles of **data integrity, cultural sensitivity, and reproducibility**, ensuring that adjustments did not distort the original meaning of responses or erase sector-specific nuances. Special attention was given to sensitive modules—such as:

- financial disclosures and employment figures—where non-response rates and reporting errors were highest during fieldwork.

This section details the data cleaning workflow, including:

1. **Initial Data Ingestion and Digitization** – converting paper-based survey forms and online submissions into a unified digital format.
2. **Validation and Consistency Checks** – detecting logical contradictions, outlier values, and inconsistencies.
3. **Handling of Missing Data** – applying targeted imputation strategies, exclusion rules, and flagging mechanisms.
4. **Standardization and Coding** – harmonizing responses to enable aggregated analysis without losing local specificity.
5. **Final Quality Review** – cross-checking cleaned datasets against original records and enumerator logs for accuracy.

By implementing these steps systematically, the project ensured that the final dataset not only meets **statistical quality standards** but also retains the **contextual richness** necessary for meaningful cultural and economic analysis of Pakistan's CCIs.

2.2 Data Cleaning Methodology

The data cleaning process was implemented as a structured, multi-stage workflow to ensure methodological rigor and traceability. Each stage was designed to address the specific challenges observed during field collection, particularly those arising from high informality, respondent reluctance on sensitive questions, and sector-specific terminology differences.

Step 1: Data Ingestion and Digitization

- **Consolidation of Sources:** Paper-based survey forms from field teams were scanned, digitized, and entered into a centralized database.
- **Unique Identifier Assignment:** Each record was assigned a unique ID code incorporating and province, city, sector sequential respondent number to facilitate traceability.
- **Double-Entry Verification:** Two independent data entry operators entered the paper-based responses into the database. Any discrepancies between the two entries were flagged and subsequently reviewed by a senior researcher, who verified the correct values against the original survey forms and provided final confirmation before inclusion in the master dataset.

Step 2: Initial Validation and Integrity Checks

- **Structural Completeness:** Ensured that all mandatory sections of the questionnaire (e.g., sector classification, location identifiers, enterprise type) were populated.
- **Range Checks:** Applied sector-specific numeric limits (e.g., wage rates, production volumes, event audience sizes) to detect extreme outliers or implausible values.
- **Skip Logic Verification:** Confirmed that conditional questions followed the intended flow; for example, export-related questions were only answered where “Exports = Yes” was indicated.

Step 3: Cross-Variable Consistency Checks

- **Logical Alignment:** Tested for coherence between related fields (e.g., total annual sales must be \geq domestic + export sales; the reported number of paid employees must align with the gender disaggregation provided by the respondent).
- **Categorical Coherence:** Ensured that categorical responses matched sector realities (e.g., a festival organizer listing “garment manufacturing” as their primary business activity was reviewed for possible sector misclassification).
- **Temporal Consistency:** Verified that reported years of operation aligned with establishment dates and respondent age data.

Step 4: Handling Missing and Incomplete Data

- **Classification of Missingness:** Responses were categorized as *Item Non-Response* (skipped question), *Don't Know* (coded as 88), or *Refusal/Prefers Not to Answer* (coded as 99).
- **Flagging Protocol:** All imputed values were flagged in the dataset for transparency in subsequent analysis.

Step 5: Standardization of Units, Formats, and Terminology

- **Monetary Figures:** All financial data converted to Pakistani Rupees (PKR) with no decimals; currency conversions applied where respondents provided USD values.
- **Volume and Quantity Units:** Standardized across records (e.g., kilograms for weight-based goods, meters for textile length, number of units for discrete products).

Step 6: Outlier Review and Contextual Validation

- **High-Low Range Analysis:** Extreme values (e.g., unusually high annual revenue for informal artisans) were re-checked with enumerator notes and, where necessary, confirmed via follow-up calls.
- **Sectoral Norms Comparison:** Compared responses against known benchmarks from the Household Integrated Economic Survey (HIES) and Labour Force Survey to identify anomalies.

Step 7: Final Quality Assurance

- **Supervisor Cross-Check:** Random 10% sample of cleaned records compared against original forms by the senior researcher.
- **Enumerator Debrief Linkage:** Enumerators' qualitative notes integrated into the cleaning process to retain contextual explanations for atypical responses.
- **Final Dataset Approval:** The cleaned data set was reviewed by the Senior expert, archived in analysis-ready format (CSV/Stata) for future audits.

2.3 Descriptive Analysis Overview

The descriptive analysis in this chapter presents the main findings from the national rollout of the Cultural and Creative Industries (CCI) survey, drawing on responses from 250 enterprises and practitioners across all five provinces—Punjab, Sindh, Khyber Pakhtunkhwa (KP), Balochistan, and Gilgit-Baltistan (GB). The analysis provides an evidence-based account of sectoral characteristics, business operations, and emerging economic patterns within Pakistan’s CCIs.

To ensure that the distinct realities of smaller provinces are not obscured in aggregate statistics, the results are presented in **two regional groupings**:

1. **Khyber Pakhtunkhwa, Balochistan, and Gilgit-Baltistan**
2. **Punjab and Sindh**

This disaggregation reflects a key economic consideration: Punjab and Sindh together account for the bulk of Pakistan’s industrial output, service-sector concentration, and market capitalization. In the context of the CCIs, these provinces host the largest textile clusters, the most developed food and music industries, and emerging hubs for gaming and digital services. Their enterprises tend to operate at a greater scale, with higher average revenues, more diversified product lines, and greater integration into national and international markets.

By contrast, CCIs in KP, Balochistan, and GB typically operate in smaller, more localized economies, with lower levels of industrial infrastructure, limited market access, and fewer institutional support mechanisms. Aggregating these results with those from Punjab and Sindh risks statistical dilution, where the larger volumes and higher averages from the dominant provinces overshadow the constraints, opportunities, and performance patterns of smaller and more geographically remote markets.

By separating the analysis into these two groupings, this chapter provides clearer visibility into the operational realities, market structures, and growth constraints faced by CCI actors in smaller provinces, while also presenting the performance profiles of enterprises in Pakistan’s main economic hubs. This approach ensures that policy recommendations arising from the findings are regionally grounded and responsive to the different market conditions in which CCIs operate.

2.3.1 Descriptive Analysis of Cultural and Creative Industries in Gilgit-Baltistan, Khyber Pakhtunkhwa, and Balochistan

Artisan Sector

Survey Coverage and Respondent Profile

The survey covered 22 artisan enterprises across Khyber Pakhtunkhwa, Balochistan, and Gilgit-Baltistan. The respondent pool was 37.5% female and 62.5% male, with most participants having completed high school education.

Roughly half of the surveyed firms were engaged in the fabric arts sub-sector, including traditional fabrics, batik, and embroidery—crafts deeply rooted in local heritage. Significantly, almost all respondents reported that their work holds cultural significance to them personally, underscoring the sector's role in sustaining intangible cultural heritage alongside economic activity.

Business Structure and Employment Characteristics

A majority (64%) of respondents identified themselves as craftspeople or traditional artists, and nearly half (46%) operated from retail storefronts, integrating production and sales under one roof.

Collectively, these firms employed 183 individuals, one-third of whom were directly engaged in creative activities. Production is predominantly handcrafted and individualized, a feature that distinguishes it from scalable manufacturing processes observed in sectors such as textiles. This artisanal mode of production preserves cultural distinctiveness but limits the potential for rapid scaling and mass-market penetration.

Economic Contribution, Cost Structure, and Informality

Reported annual cost structures ranged from PKR 15,950 to PKR 18 million, with profit margins ranging between 8% and 20%. None of the surveyed firms reported paying taxes. The absence of formal registration, combined with zero tax compliance, positions the sector as a quintessential example of Pakistan's informal economy.

Respondents overwhelmingly indicated that tax policy has no impact on their operations—a telling sign of their detachment from formal fiscal systems. No firm reported receiving government support, and there was a consensus view that public-sector incentives for artisans are non-existent. This lack of integration into formal economic systems constrains both policy engagement and access to institutional finance.

Market Orientation and Indigenous Production Ecosystem

Artisan production in these provinces is entirely domestically oriented. Raw materials are sourced locally through retailers and wholesalers, and sales are directed almost exclusively toward Pakistani consumers. No surveyed firm engaged in exports, and there was no evidence that digitization had materially affected revenue streams.

The sector operates as a closed-loop ecosystem—micro-scale, locally financed, and culturally embedded. Nearly 90% of firms were micro-enterprises with investment levels below PKR 2.5 million, predominantly self-financed. Engagement with formal-sector finance institutions such as banks was minimal to non-existent.

Challenges and Constraints

The primary barriers to export identified by respondents were:

- Lack of skills in contemporary design and production methods.
- Limited knowledge of market trends and emerging technologies.
- Poor access to production-enhancing technology.

In day-to-day operations, the most pressing challenges were:

- Access to high-quality raw materials.
- Limited availability of affordable finance.
- High and unstable energy costs and supply disruptions.

From an economic perspective, these constraints reflect a low-capital, high-skill but low-productivity equilibrium, in which the preservation of cultural authenticity is achieved at the expense of broader market integration and growth potential.

Summary Assessment

The artisan sector in KP, Balochistan, and GB is culturally rich but economically constrained. It sustains traditional skills and local identities but remains structurally excluded from formal markets, export channels, and institutional support. Without targeted investment in skills development, technology adoption, and market linkages, the sector's economic contribution will remain modest, even as it continues to play an essential role in cultural preservation.

Textile Sector

Survey Coverage and Respondent Profile

The survey covered 20 textile enterprises across Khyber Pakhtunkhwa, Balochistan, and Gilgit-Baltistan. All respondents were male, and the majority were engaged in wholesale and manufacturing or design and creation within the apparel segment.

Educational attainment varied: all respondents had completed primary school, most had completed intermediate education, and one in four possessed at least a bachelor's degree. This reflects a mixed skills base, where formal higher education is not the norm but a subset of owners and employees have acquired tertiary qualifications, potentially enhancing business management and design capabilities.

Business Structure and Employment Characteristics

Respondents were split evenly between business owners and full-time employees. Nearly all owners (90%) had managed their businesses for over three years, suggesting operational stability despite small firm size.

Among full-time employees, wage levels were uneven: 40% earned below the national minimum wage (PKR 37,000/month \approx USD 132), while 60% earned above it (greater than PKR 50,000/month \approx USD 178). This disparity reflects segmented labor market outcomes within the sector, where skill levels, firm productivity, and possibly market orientation drive wage differentials.

The 20 surveyed firms employed 106 individuals, of whom 83% were men and 17% women. Creative roles accounted for 81% of total employment, but women made up only 15% of these positions, indicating a gender imbalance in creative engagement.

Firm size was predominantly micro (60%) or small (33%) in investment terms, with micro enterprises operating with less than PKR 2.5 million (~USD 8,900) in capital. Self-financing was the primary mode of capitalization, with no recorded use of formal sector finance from banks, microfinance institutions, or government programs.

Economic Contribution, Informality, and Taxation

Despite their small scale, these enterprises reported an average annual sales growth of 20% and volume growth of 28% in 2022–23, suggesting that even low-capital firms can respond effectively to market demand.

However, informality remains entrenched: only 20% of firms reported paying taxes. Based on the Pakistan’s definition of informality (non-tax filing), the majority of the sector remains outside the formal tax net. The implications are significant: of the PKR 117 million in sales revenue reported, PKR 96 million (82%) went undocumented for tax purposes—representing roughly PKR 18 million in forgone indirect tax revenue.

The causality between low tax compliance and lack of government support is ambiguous. Either the absence of support discourages formalization, or the absence of formalization prevents support from reaching the sector. Nonetheless, the correlation is clear, and without a reconfigured tax and incentive framework, this feedback loop will persist.

Market Orientation and Cost Pressures

The sector is domestically focused, with exports almost non-existent. Nevertheless, 20% of firms import materials or products, indicating some integration into international supply chains—albeit on the input side rather than in final goods.

Firms reported rising product prices over 2022 and 2023, consistent with Pakistan’s broader inflationary trends. Inflationary pressures affect formal and informal actors alike, but for small businesses operating on thin margins, cost shocks—especially in energy prices, which respondents identified as their most significant constraint—can directly undermine operational viability.

Government Support and Policy Implications

Only 15% of respondents believed that the government provides adequate support and incentives for the sector. The lack of engagement between public institutions and the textile SMEs in these provinces underscores both a governance gap and a missed opportunity for sector development. Given the sector’s growth potential, targeted policies that link tax compliance with tangible benefits—such as subsidized energy tariffs or preferential access to credit—could both expand the tax base and improve competitiveness.

Summary Assessment

The textile sector in KP, Balochistan, and GB is small-scale, labor-intensive, and domestically oriented, with strong creative employment share but limited gender diversity. While the sector demonstrates capacity for growth, its contribution to the formal economy is constrained by entrenched informality, limited access to finance, and rising input costs—particularly energy. Without targeted interventions to address these constraints, the sector will remain underleveraged in both domestic and export markets, despite its cultural and economic significance.

Food Sector

Survey Scope and Respondent Profile

The field survey covered 35 food-related enterprises spanning manufacturing, services, retail, and wholesale across Khyber Pakhtunkhwa, Balochistan, and Gilgit-Baltistan. Sector composition was as follows:

- 10 firms in food production (manufacturing and processing)
- 11 firms in food services (restaurants, cafés, catering)
- 8 firms in food retail (grocery, specialty shops)
- 6 firms in wholesale and distribution

Only one respondent was female, confirming a gender imbalance in sector ownership and management. Educational attainment ranged from no formal schooling (5 respondents) to graduate-level education (4 respondents), with 31% holding at least a bachelor's degree. This reflects a dual structure—a large share of low-formal-education, skills-based operators co-existing with a smaller segment of higher-educated entrepreneurs.

Business Structure and Employment

Of the respondents, 63% were business owners and 29% were full-time employees. Firm ownership is typically long-standing—59% of owners have managed their business for more than five years—indicating a relatively stable but small-scale entrepreneurial base.

The 35 surveyed firms employed 199 people:

- 87% male, 13% female
- 75% involved in creative activities (e.g., menu design, product innovation)
- Only 11% of creative workers were female, indicating a narrow female footprint in higher-value creative roles.

Wage distribution showed labour market segmentation:

- 40% of employees earned above PKR 60,000/month (~USD 213)
- 50% earned PKR 30,000/month (~USD 106), below the national minimum wage (PKR 37,000/month ≈ USD 132)

Economic Contribution and Capital Structure

Estimated aggregate sales revenue for the most recent year was PKR 50.4 million (~USD 178,000). The scale is modest but meaningful for regional economies, especially given the labour-intensive nature of the sector.

Capitalization patterns confirm strong reliance on informal finance:

- 77% self-financed
- 17% financed through personal networks (friends, relatives)
- 11% accessed bank credit
- No financing from government or microfinance institutions

Firm size was overwhelmingly micro (74% with investment below PKR 2.5 million ≈ USD 8,900) and small (23%).

Taxation, Informality, and Fiscal Impact

None of the surveyed firms reported paying taxes. By Pakistan's definition, 100% of the sample is informal. Even among the 25% formally registered firms, fiscal compliance was absent, suggesting registration without integration into the fiscal system.

From a public finance perspective, the entire PKR 50.4 million in sales went untaxed, implying roughly PKR 9 million in forgone indirect tax revenue. The fiscal gap underscores a structural problem: firms outside the tax system cannot access targeted state support, while firms without access to such support have little incentive to formalize—creating a self-reinforcing informality trap. Such large-scale undocumented activity also puts an additional burden on the provinces' obligations to the country's external debt.

Market Orientation and Price Dynamics

The sector is entirely domestically oriented, with both inputs and sales sourced and delivered locally. Export activity is non-existent. Such localized value chains strengthen regional economies but leave the sector insulated from foreign market opportunities and vulnerable to domestic demand shocks.

Most firms reported price increases in 2022–2023, consistent with national inflationary pressures. For small businesses, inflation is particularly damaging, as they face rising input costs without commensurate bargaining power to pass these fully onto consumers—stressing already slim profit margins.

Constraints and Policy Implications

The most frequently cited operational constraint was financial access, followed by challenges in maintaining cost stability for inputs such as energy.

From a policy standpoint, the absence of formal finance, the fiscal disconnect, and the lack of export orientation form a triple constraint on sector growth.

- Credit-linked formalization incentives could bring more firms into the fiscal net.
- Energy cost stabilization or targeted relief for micro and small food businesses could protect employment in this labour-intensive sector.
- Market development programs could integrate selected firms into domestic value chains with higher value-addition potential.

Summary Assessment

The food sector in KP, Balochistan, and GB is a deeply local, labour-intensive industry with stable but small-scale enterprises. Its economic footprint is under-recorded and under-leveraged due to entrenched informality, limited access to finance, and lack of integration into formal supply chains. While it sustains livelihoods and local consumption, without fiscal incentives, financial inclusion, and targeted capacity-building, it is unlikely to move beyond its current low-growth equilibrium.

Festival Sector

Sector Overview and Cultural Significance

The survey captured 11 festivals across Khyber Pakhtunkhwa, Balochistan, and Gilgit-Baltistan. All respondents were male and identified as festival organizers. Educational attainment is relatively high for the CCI sectors in these provinces—45% hold a graduate degree (Master's or PhD), while the remaining 55% have completed education between middle school and bachelor's level.

A plurality (45%) of festivals were organized independently, without support from government, non-profit organizations, or other institutional partners. Respondents cited cultural celebration, seasonal commemoration, and local entertainment as the primary purposes of the festivals.

Most events operate on short preparation cycles—64% required less than one month to organize. The average festival duration was two days. Over the past five years, 82% of festivals had been held between one and five times, indicating consistent local demand and operational continuity.

Content is diverse: 73% of festivals were multi-category, featuring combinations of music, food, cultural activities, art, film, religious observances, and literary programming. Most are annual events, concentrated in March and December.

While festivals attract participants across all age groups, female attendance remains low—only 27% reported events where women comprised at least half of the audience. This highlights persistent gender imbalances in cultural participation, which constrain audience growth potential.

Employment Structure and Creative Participation

The surveyed festivals collectively employed 496 individuals, of whom:

- 80% were male and 20% female
- 38% were engaged in creative roles, with women making up 18% of this creative workforce

Notably, 90% of respondents stated that festival organization is not their primary income source, suggesting that most operate festivals as secondary economic activities. From an economic standpoint, this underscores the part-time, supplementary nature of employment in this sector, but also its potential for expansion into a more consistent revenue-generating industry if structural support is provided.

Revenue Generation and Funding Models

Only 10% of surveyed festivals reported annual revenue above PKR 500,000 (~USD 1,769); the remainder generated less. Main income sources included:

- Ticket sales
- Food stall fees
- Advertising revenue

Corporate sponsorship emerged as the dominant funding channel, with minimal to no support from government or donor agencies. The festivals are deeply local—they hire local talent, source inputs locally, and have no international franchising, talent exports, or merchandise sales.

Organizers are generally optimistic: 46% expect significantly higher revenue for their next edition, reflecting favorable demand conditions and opportunities for scaling up economic impact.

Market Reach and Attendance Patterns

Festivals overwhelmingly serve local audiences:

- 90% of attendees live within 50 km of the festival site
- 6% come from other parts of Pakistan
- Foreign attendance is negligible

This geographic concentration limits spillover effects into tourism and regional economic integration. Attendance volumes remain modest—73% of festivals recorded fewer than 5,000 attendees annually. Most festivals feature up to 25 performers or exhibitors, reinforcing their small-scale operational nature.

Regulatory Status and Government Engagement

A relatively high proportion—73%—of surveyed festivals are registered legal entities. However, only 35% of respondents believe the government provides adequate incentives or support for festival growth. This signals a disconnect between formal registration and perceived institutional benefit, raising questions about the value proposition of formalization in this sector.

Financial Performance and Market Dynamics

Given the low international exposure, festival revenues are primarily dependent on local purchasing power. Organizers report that attendance and spending per visitor are heavily influenced by regional economic conditions.

Market inclusivity is constrained not just by geographic reach but also by gender participation gaps—suggesting that targeted marketing and community-driven social interventions could expand both audience size and festival revenues.

Capacity-Building Needs

When asked about measures to enhance operational capacity, organizers identified three high-priority interventions:

1. **Training programs for volunteers** – to improve festival logistics, crowd management, and service quality.
2. **Networking opportunities** – to connect with other organizers, sponsors, and cultural stakeholders, fostering collaboration and best-practice sharing.
3. **Strategic planning support** – to improve event design, scheduling, and resource allocation, thereby strengthening long-term sustainability.

These preferences indicate that human capital and organizational capability building are seen as more immediately impactful than financial assistance alone. This presents a policy opportunity to couple capacity-building with targeted fiscal and logistical support.

Key Constraints

Across the board, organizers identified financial constraints as the most significant barrier to both organizing and expanding festivals. Other challenges include limited infrastructure, restricted marketing budgets, and dependence on a narrow local audience base.

Despite these challenges, 100% of festivals reported using social media for promotion—underscoring its role as a low-cost, high-reach marketing tool in democratizing access to cultural events.

Summary Assessment

The festival sector in KP, Balochistan, and GB is culturally vibrant but economically underleveraged. It sustains local employment, fosters community engagement, and preserves heritage, yet operates within tight financial, geographic, and institutional constraints.

From an economic policy perspective, the sector's growth potential lies in:

- Broadening audience reach beyond local boundaries, including tourism integration
- Expanding gender participation to unlock new demand
- Linking formalization to tangible benefits, such as subsidized venues, marketing support, and strategic planning grants

Without targeted interventions, festivals will continue to thrive as cultural fixtures but remain economically marginal in their contribution to GDP and regional development.

Music Sector

Sector Overview and Cultural Role

The music sector in Khyber Pakhtunkhwa, Balochistan, and Gilgit-Baltistan reflects a small but culturally significant creative sub-economy. The survey covered 30 businesses, all male-led, with 73% of respondents working directly as musicians, singers, or composers.

Educational attainment levels vary: 80% have at most a bachelor's degree, while three respondents reported no formal education. This indicates a workforce where skills are often informally acquired and cultural transmission is likely to play a stronger role than formal training.

The sector operates largely as a self-driven creative ecosystem, without significant institutional scaffolding. This has implications for both its resilience and vulnerability—talent persists despite low formal investment, but growth potential remains under-realized.

Employment Structure and Income Stability

Respondents' professional arrangements reveal an informal, project-driven income model:

- 73% are paid per project (song, album, or event) rather than through regular wages.
- Only 13% are business owners, of whom 75% have managed their enterprises for over three years.
- 63% rely exclusively on music for their income, underscoring its importance as a primary livelihood despite instability.

Incomes are modest: 70% estimated an average monthly income of PKR 35,000 (~USD 124), below Pakistan's minimum wage of PKR 37,000. Only 10% reported earning more than PKR 100,000 (~USD 354) per month. This reinforces the income volatility and precarity that characterizes creative industries in less economically diverse provinces of the country.

Business Operations and Economic Contributions

The surveyed musicians employed a total of 47 individuals:

- 85% male, 15% female
- 74% in creative roles, but women constitute only 8% of the creative workforce

In 2023, respondents reported gross music-related earnings of PKR 12.96 million (~USD 46,000).

Income sources include:

- Session fees from private non-ticketed events
- Payments from record companies
- Fees from teaching music lessons

Operational expenditure patterns highlight the sector's capital intensity despite its small size:

- PKR 5.2 million (~USD 18,400) spent on musical instruments
- PKR 3 million (~USD 11,000) invested in music software

All reported income was generated within Pakistan, meaning the sector is wholly domestically oriented, without foreign exchange inflows.

Market Conditions and Support Perceptions

Only 13% of respondents believe the government provides adequate incentives or support for the music industry; 87% disagree. From an economic policy lens, this reflects a gap between cultural value and institutional recognition, where music's social role is acknowledged locally but not actively supported at the policy level.

The most cited barriers to growth include:

- Access to music-specific education
- Availability of financial support

When asked which interventions should be prioritized, respondents overwhelmingly recommended:

1. Educational initiatives – both for emerging and established musicians.
2. Increased funding – to stabilize incomes and support professional development.

Policy and Investment Implications

The current music economy in these provinces operates without formal market expansion strategies, relying heavily on personal networks, local demand, and cultural traditions. From an investment standpoint, small, well-targeted public interventions could yield disproportionately high returns:

- Training support – leveraging existing public infrastructure, such as using government buildings in off-hours for music classes.
- Financial grants or stipends – redirecting a portion of education or cultural budgets to provide financial assistance to active musicians.

Such measures would not require “reinventing the wheel”, but could strengthen a nascent yet deeply rooted industry that currently survives on passion rather than structural support.

Summary Assessment

The music sector in KP, Balochistan, and GB demonstrates resilience under structural neglect. While earnings are modest and income volatility is high, the sector shows strong cultural integration and potential for scalable growth if provided with targeted skills training, modest financial support, and formal recognition in provincial cultural strategies.

Without such interventions, the sector risks continuing in economic marginality, with cultural contributions sustained only by the dedication of a few passionate individuals.

2.3.2 Descriptive Analysis of Cultural and Creative Industries in Sindh

Artisanal Sector (Sindh)

Sector Overview

The artisanal sector in Sindh exhibits higher educational attainment, gender diversity, and a continued reliance on traditional production methods, but remains almost entirely informal and disconnected from institutional support structures. The survey covered eight businesses from Sindh, of which 37.5% were female respondents and the remaining were male. Most respondents held undergraduate degrees—representing, on average, six more years of education than their counterparts in Khyber-Pakhtunkhwa, Balochistan, and Gilgit-Baltistan.

Production is concentrated in the Fabric Arts sector (traditional fabrics, *batik*, embroidery) and paper crafts (handmade cards, papier-mâché, etc.). Notably, 62% of the sample reported that their work is meaningful to their culture, which is markedly lower than the nearly universal affirmation recorded in the smaller provinces. This divergence suggests that while artisanship in Sindh retains cultural significance, commercial motivations may be comparatively stronger here than in peripheral regions.

Respondent Roles and Employment Characteristics

In terms of roles, 75% of respondents identified as craftspeople (traditional artists) or designers. Unlike other provinces, none of the surveyed firms operated out of retail storefronts; instead, 50% were home-based businesses, and the remainder operated from dedicated workspaces.

The firms collectively employed 13 persons, of whom 77% were directly engaged in creative activities. The nature of production, similar to what we observed in Khyber-Pakhtunkhwa, Balochistan, and Gilgit-Baltistan, is handcrafted and individualized. This reliance on artisanal, labor-intensive techniques is economically significant: while it preserves cultural authenticity, it also constrains scalability and productivity growth.

Cost Structure and Informality

The surveyed firms reported a cost structure ranging from PKR 275 to PKR 139,800, indicating wide variation in operating scales. Reported profit margins fell between 8% and 20%, with most clustering in the 11–15% range.

Tax compliance remains negligible: apart from one, none of the surveyed firms report paying taxes. This mirrors the findings in Khyber-Pakhtunkhwa, Balochistan, and Gilgit-Baltistan. The sector is effectively undocumented by every level of government and is emblematic of Pakistan's informal economy. Supporting this, most respondents reported that tax policy had no impact on them. Moreover, firms receive no support from government agencies and believe that the state does not provide adequate incentives for this sector.

Indigenous Orientation

As in other provinces, Sindh's artisanal sector is indigenous proper: it sources inputs from local retailers and wholesalers, sells primarily to domestic markets, and does not participate in exports. The customer base is predominantly local and Pakistani.

Digitization has had no observable impact on revenue, aligning with trends in Khyber-Pakhtunkhwa, Balochistan, and Gilgit-Baltistan. These firms thus function as self-contained ecosystems at the periphery of the formal economy.

All surveyed firms were micro-sized enterprises, with an investment layout of less than PKR 2.5 million. Financing was exclusively self-funded, with no evidence of support from formal-sector financial institutions such as banks or government programs.

Challenges

Respondents identified multiple barriers to growth and export. The most frequently cited were lack of technology, poor access to information on market trends, weak promotional channels, and limited access to finance. Additionally, respondents noted the poor attitude of relevant government agencies as a significant impediment to engaging with export markets.

For day-to-day operations, firms highlighted difficulty accessing quality raw materials and restricted access to markets as their most pressing challenges. Taken together, these issues suggest that while Sindh's artisans are somewhat better educated and more gender-inclusive than

their counterparts elsewhere, their economic potential remains heavily constrained by systemic neglect, infrastructural gaps, and institutional inefficiencies.

Summary Assessment

The artisanal sector in Sindh is emblematic of Pakistan's informal cultural economy: small in scale, predominantly self-financed, and deeply rooted in local cultural traditions, yet almost entirely disconnected from formal markets and institutional support. Compared with artisans in Khyber- Pakhtunkhwa, Balochistan, and Gilgit-Baltistan, Sindh's artisans are better educated and more gender-inclusive, but this has not translated into higher formalization or stronger market linkages. Persistent informality, negligible tax compliance, and the absence of digitization keep the sector trapped at the periphery of the economy.

From an economic perspective, the sector demonstrates clear latent potential for productivity gains and market expansion, but unlocking this requires low-cost structural interventions—such as providing market information, improving access to finance, and formalizing institutional support—that can transform artisanal work from a survivalist occupation into a driver of inclusive cultural and economic development.

Textile Sector (Sindh)

Sector Overview

The textile sector in Sindh illustrates a complex picture of small-scale industrial activity marked by youth participation, modest educational attainment, and constrained formalization. The survey covered 14 businesses, of which two respondents were female and the remaining were male. Nearly half of the respondents (43%) were between 18 and 30 years of age, indicating that Sindh's textile workforce is relatively younger than in other provinces, a demographic factor that may offer long-term potential if skills are strengthened.

Most firms surveyed were concentrated in the wholesale and manufacturing segment, particularly apparel. All respondents had at least primary school education, with the majority completing intermediate studies. This suggests an educational baseline that is higher than artisans but still insufficient to drive sustained productivity gains without vocational and technical upskilling.

Respondent Roles and Employment Characteristics

Employment roles were split between full-time employees (57%) and business owners (43%). Half of the business owners had managed their enterprises for fewer than three years, while one-third had operated for more than three years, showing both new entry and some stability in the sector. Among full-time employees, 50% reported average monthly earnings of PKR 35,000 (USD 125), slightly below the national minimum wage of PKR 37,000 (USD 132). The remaining employees reported incomes exceeding PKR 50,000 (USD 178), showing a dual wage structure that reflects uneven productivity and firm-level profitability.

Business Operations and Economic Contributions

The sector is small but economically significant. The 42 employees across the surveyed firms were overwhelmingly male (88%), with women representing just 12% of the workforce. Creative intensity was notable: 62% of employees were engaged in creative activities, though women represented only 7% of this group, highlighting a stark gender gap in high-value tasks.

Firm size is overwhelmingly micro in scale: 78% had investments below PKR 2.5 million (~USD 8,900). Almost all firms were self-financed, with no access to formal credit, banks, or microfinance institutions. Despite their size, these firms remain important employment providers, accounting for the majority of jobs in the sector. However, the absence of institutional financing restricts their ability to scale operations or upgrade technology.

Financial Performance and Market Dynamics

Financially, Sindh's textile firms showed moderate but positive growth dynamics. Respondents reported an average sales growth rate of 36% in 2022–23, with volumes increasing by 11%. These figures suggest resilience, though the gap between sales and volume growth indicates that inflationary price increases contributed more to revenue growth than productivity or expanded output.

Tax compliance in Sindh diverges somewhat from the national trend. While only 36% of firms filed taxes, these tax-filing firms accounted for over 90% of the sector's revenue. Of the PKR 130 million in reported sales, PKR 127 million was documented and taxed, pointing to a concentration of fiscal responsibility among a small group of more formalized firms. Yet, only two firms reported making use of available tax incentives, and perceptions of tax policy impact were mixed: some firms acknowledged positive impacts, while others reported negative consequences for growth.

Profitability levels were modest but stable. Half of the firms reported margins of 11–20%, consistent with the broader industry structure in Pakistan. Importantly, firms overwhelmingly serve domestic markets, with exports nearly absent. This aligns with evidence that Sindh's textile sector, outside Karachi's large-scale industry, is local-market oriented and largely disconnected from global value chains.

As with other provinces, inflationary pressures in 2022 and 2023 drove significant cost increases, with most firms reporting a rising price trend for their products. Energy costs and access to finance were identified as the most significant constraints to business operations.

Finally, and perhaps most importantly, none of the surveyed firms believed that government support or incentives were adequate for the growth of the sector. This finding underscores the perception gap between policy instruments and firm-level realities.

Summary Assessment

The textile sector in Sindh is characterized by a paradox of informality and concentration. On one hand, the majority of firms are micro-scale, self-financed, and informal—mirroring structural weaknesses observed nationwide. On the other, a small subset of tax-filing firms is disproportionately responsible for both revenue and fiscal contribution, highlighting the dual economy within the sector. Growth in 2022–23 appears largely price-driven, raising concerns about sustainability in the absence of productivity-enhancing investment. Gender participation remains severely limited, with women excluded from creative and high-value activities.

From a policy standpoint, Sindh’s textile sector demonstrates both the risks of informality and the opportunities through partial formalization. Expanding access to institutional finance, ensuring fairer distribution of tax incentives, and supporting export-oriented linkages could enhance competitiveness. Without such interventions, the sector will remain trapped in a low-capital, domestically confined cycle vulnerable to inflationary shocks and energy price volatility.

Food Sector (Sindh)

Sector Profile and Context

The food sector in Sindh reflects the broader structural characteristics of Pakistan's cultural and creative industries: small-scale, male-dominated, and deeply localized. Our survey covered 16 businesses, of which only one was female-owned. Half of the respondents were young (aged 18–30 years), highlighting the sector's role as a youth employer and entry point into entrepreneurship. Most respondents were high school graduates, placing educational attainment above some other provinces but still far below the levels required for systematic business scaling.

The majority of surveyed firms operated within the food services subsector, particularly restaurants, cafés, and catering businesses. This mirrors national patterns where food services dominate over food retail or production, suggesting that consumer-facing services rather than manufacturing form the backbone of Sindh's food-related creative economy.

Employment Structures and Firm Characteristics

Employment structures in Sindh's food sector remain strongly skewed toward ownership and self-employment. Roughly one-third (31%) of the respondents were business owners, while nine respondents were full-time employees. Of the owners, 50% had managed their businesses for over five years, indicating persistence and sectoral stickiness, while the rest had owned firms for between one to five years.

Income patterns reveal persistent informality and vulnerability. Among full-time employees, one-third earned below the national minimum wage (PKR 37,000; ~\$132), while 22% reported monthly incomes above PKR 50,000 (\$213). Another third reported monthly incomes of PKR 30,000 (\$106), underscoring the precariousness of livelihoods in this sector. Despite being relatively established, the sector struggles to provide stable, formal employment, with work often contingent on firm size and cash flow.

Production Models and Economic Contribution

The 16 surveyed firms employed a total of 75 workers, all men. Creative intensity is relatively high, with 71% of employees engaged in creative tasks such as recipe design, food preparation, and presentation. This highlights the sector's potential as a creative services hub, though it also reflects the gender exclusion common to Pakistan's service economy.

Annual sales revenues from the sample were estimated at PKR 7.59 million (~\$26,600), excluding one outlier firm. The majority (81%) of firms qualify as micro-enterprises with investments under PKR 2.5 million (~\$8,900), while the remainder fall into the small-enterprise category (PKR 2.6–50 million). Crucially, all firms were self-financed, relying entirely on personal or family savings rather than formal banking or public credit. This self-containment creates resilience in the short term but also leaves firms highly exposed to shocks, both endogenous (supply disruption, illness) and exogenous (inflation, regulatory enforcement).

The largest expenditure item across firms was food ingredients, accounting for the majority of operating costs. This narrow cost structure makes businesses highly sensitive to input price inflation, which has accelerated in Pakistan since 2022.

Although **19% of firms reported exporting their products**, sales data suggest negligible export volume. This could be a disclosure issue as well. See section 1.5 of this report. Like other provinces, Sindh's food sector is almost entirely inward-facing, dependent on local supply chains and domestic demand.

Financial Performance and Market Dynamics

On fiscal compliance, only 31% of firms reported filing taxes, broadly consistent with Pakistan's national profile of informality in the food sector. Interestingly, these firms still face regular food inspections, pointing to a disconnect between regulatory monitoring and formal registration. Firms thus incur the costs of oversight without receiving the benefits of formal sector integration —such as access to finance, government incentives, or technical upgrading programs.

Market dynamics further reveal the constraints and opportunities of small-scale food enterprises. Almost half the firms use social media as their primary marketing channel, and 37% of respondents viewed digital presence as critical to business survival. Price sensitivity is acute: 75% of respondents identified discounts as their most effective promotional tool, reflecting the competitive and community-based nature of the sector.

Despite modest growth potential, firms cited regulatory hurdles and limited technological adaptation as their most pressing constraints. In combination with low profit margins (8–10% for most firms), these barriers suggest that while the food sector can sustain itself at small scales, it lacks the enabling environment to graduate into medium- or large-scale enterprises.

Structural Challenges and Policy Gaps

Sindh's food sector illustrates the paradox of Pakistan's creative economy: firms exist in plain sight yet remain invisible to policy. The reliance on self-financing, low wages, and informal practices limits the sector's productivity potential. At the same time, frequent inspections suggest that government engagement is uneven—firms are monitored but not meaningfully supported.

The absence of financing pathways, the over-reliance on food inputs as a single cost driver, and the negligible export capacity further highlight the sector's fragility. With 45% of respondents under 30 years old, the sector represents an entry point for youth entrepreneurship, but without systemic interventions in credit, training, and digital marketing, these businesses risk stagnation.

Summary Assessment

Sindh's food sector is youthful, highly localized, and predominantly informal. It demonstrates resilience through self-financing and cultural embeddedness but remains structurally fragile due to low wages, minimal profitability, and poor integration with formal financial and regulatory systems. While modestly adopting digital tools, firms continue to face binding constraints from regulatory burdens, inflationary pressures, and lack of institutional support. The sector holds potential as a youth-driven growth segment, but unlocking this potential will require targeted interventions—particularly in easing regulatory asymmetries, expanding credit access, and leveraging digital platforms for broader market integration.

Festival Sector (Sindh)

Sector Profile and Context

The survey encompassed five festivals in Sindh, with all respondents being male organizers. Educational attainment among respondents was mixed but generally low: 40% had completed intermediate education, another 40% had no formal education, and only 20% held a graduate degree.

Compared to Baluchistan, KP, and GB—where 45% of festivals were organized independently—Sindh presents a more diverse organizational model. Here, 40% of festivals were organized by commercial entities, 40% by independent organizations, and 20% by non-profit or community organizations. The thematic purpose of festivals also differed: while other provinces emphasized seasonal change and cultural celebrations, Sindh's festivals were more focused on celebrating culture, youth, and design.

Preparation time and scale vary: 60% of organizers reported that their events took less than one month to prepare, while the average duration ranged between one and ten days. All respondents confirmed that their festivals had been organized multiple times, signaling persistence despite structural challenges.

Festival Composition and Participation

Festival composition in Sindh is comparatively narrow. Only 40% of festivals were multi-category events—covering music, food, arts, film, religious, and literary activities—well below the 73% reported in Baluchistan, KP, and GB. Seasonal drivers are less pronounced in Sindh, resulting in greater variability in frequency compared to other provinces.

In terms of participation, festivals attract attendees across age groups. However, none of the surveyed festivals reported 50% or greater female attendance. This stands in contrast to some festivals in Baluchistan, KP, and GB where women formed the majority. Considering that women constitute 47.9% of Sindh's population, the absence of equitable female representation in cultural spaces highlights both social constraints and economic inefficiencies. Recreational activities remain male-oriented, underscoring the urgent need for gender-sensitive cultural policies to expand participation beyond the labor market into public and cultural life.

To strengthen their operations, respondents identified networking opportunities and marketing support as the most impactful forms of external assistance.

Employment Structures and Economic Contributions

The surveyed festivals collectively employed 349 workers, of whom 59% were male and 39% female. Creative intensity was high: 74% of employees were directly involved in creative roles, with women comprising 34% of that subgroup. This level of female participation in creative roles is relatively strong compared with other parts of the cultural economy.

Nonetheless, 40% of organizers stated that festival management was not their primary source of income, in contrast to the 90% reported in Baluchistan, KP, and GB. This suggests that festivals in Sindh may function as supplementary activities rather than primary livelihoods, limiting their economic depth.

Revenue levels remain low. None of the surveyed festivals generated more than PKR 500,000 (~USD \$1,769); most earned less. Revenue streams are primarily ticket sales and food stalls, with sponsorship from corporate entities providing the largest source of financial support.

Looking forward, all respondents anticipate higher revenues in future editions, consistent with positive demand-side dynamics observed in other provinces.

Internationalization is rare. Only one surveyed festival reported hosting international performers. The majority maintain a strictly local orientation, hiring domestic talent, with no engagement in franchising, cultural exchange, or international merchandise sales.

Financial Performance and Market Dynamics

Festivals in Sindh remain hyper-local in reach. Nearly 92% of attendees live within a 50 km radius of the event, while only 8% come from elsewhere in Pakistan and foreign attendance is negligible. This geographic concentration sharply limits market expansion. Importantly, given Sindh's large population, this represents an untapped opportunity: with targeted policy interventions, even modest efforts could boost attendance and extend the economic footprint of festivals.

Attendance volume is also constrained. All festivals reported fewer than 1,000 attendees—substantially lower than festival sizes recorded in Baluchistan, KP, and GB. Programming is similarly modest, with festivals including up to 24 performers or exhibitors.

Formalization remains partial. Half the surveyed festivals are registered legal entities, but only 20% of respondents believe government policies provide adequate support for sectoral growth. Marketing practices are heavily reliant on social media (80%), supplemented by collaborations with local businesses and community outreach. Adoption, however, lags behind other provinces.

Challenges

Respondents highlighted financial constraints as universal barriers to festival growth and sustainability. Additionally, 60% identified market competition as the most pressing challenge, suggesting an oversupply of small-scale events competing for the same limited local audience.

The absence of broader promotional infrastructure, weak government incentives, and the lack of market diversification beyond local attendees collectively constrain growth. Furthermore, gender exclusion remains a critical structural barrier: without greater female participation, both cultural inclusivity and market expansion will remain restricted.

Summary Assessment

Sindh's festival sector reflects both cultural vibrancy and structural fragility. Festivals are frequent, community-anchored, and sustained by local demand, yet they operate at a small scale with limited revenues and negligible international linkages. The stark gender imbalance in participation underscores the exclusionary nature of public cultural spaces in Sindh, in contrast with more inclusive patterns in smaller provinces.

While employment contributions and creative intensity are relatively strong, weak formalization, reliance on sponsorship, and low attendance constrain economic scaling. Unlocking the sector's potential will require iterative policy measures: broadening participation (particularly women and non-local attendees), strengthening marketing infrastructure, and institutionalizing support mechanisms. Given sustained demand and favorable population density, even modest interventions could significantly increase the sector's contribution to Sindh's cultural economy.

Music Sector (Sindh)

Sector Overview

The music sector in Sindh reflects a small but diverse set of activities concentrated among performing artists and composers. The survey encompassed 10 businesses, with all respondents male. The majority (70%) identified as musicians, singers, or composers. Educational attainment varied: two respondents reported no formal education, one had completed primary school, four had completed intermediate studies, two held undergraduate degrees, and two held graduate degrees. This distribution indicates that while some artists have advanced education, the sector overall is not strongly correlated with formal educational pathways.

Employment Roles and Income Stability

Employment arrangements in Sindh's music sector are precarious and predominantly informal. Four respondents were full-time employees, while 11 were paid on a per-project basis (per song, album, or performance). Notably, the sample did not include any business owners, underscoring the absence of institutionalized or firm-based structures in Sindh's music economy.

The majority of respondents reported that their work was not formally registered, limiting access to protections, contracts, and institutional finance. Half of the surveyed musicians indicated that music was their sole source of income, while 60% reported being paid per project rather than on a regular wage basis. This reflects the high degree of income volatility and uncertainty in the sector.

Income levels reveal further fragility: 50% of respondents reported average monthly earnings of approximately PKR 35,000 (~USD 124), below the national minimum wage of PKR 37,000 (~USD 132). Only 10% reported earning more than PKR 100,000 (~USD 354) per month. These patterns suggest that while Sindh's music sector is culturally significant, it generates limited and unstable economic returns for its practitioners.

Business Operations and Economic Contributions

The 10 surveyed musicians collectively employed 21 individuals, of whom 76% were male and 24% female. Creative intensity was very high: 90% of employees were directly engaged in

creative roles, with women comprising 21% of this subgroup. This degree of female participation in creative activities, while still a minority, is comparatively higher than in other cultural subsectors.

In terms of revenues, the gross earnings of surveyed musicians, singers, and composers in 2023 were PKR 1.23 million (~USD 4,330). Primary income was derived from commissions for new works, a sign of demand for original production. On the expenditure side, respondents collectively reported spending approximately PKR 500,000 (~USD 1,960) on instruments and music software, highlighting the capital-intensive nature of artistic production despite low overall revenues.

As in other provinces, Sindh's musicians remain domestically oriented: all reported that their income is derived entirely from within Pakistan, with no international engagement or export activity.

Policy Environment and Institutional Gaps

Only 20% of surveyed respondents believed that the government provides adequate incentives and support for the growth of the music industry; 80% disagreed. This aligns with national trends of perceived neglect of creative industries.

The main challenges identified by musicians in Sindh include limited commercial support, lack of funding, and insufficient networking opportunities. This contrasts sharply with artists in Baluchistan, KP, and GB, where access to relevant education and training was seen as the primary constraint.

When asked about the most impactful forms of government support, musicians overwhelmingly prioritized assistance for digital platforms and marketing support. Given the increasingly digital consumption of music, such interventions could immediately improve market access and visibility for Sindh's artists at relatively low cost.

Strategic Outlook

Sindh's music industry reflects both fragility and latent potential. While income levels remain below national benchmarks and work is characterized by informality and volatility, there are

clear areas where targeted interventions could yield disproportionate gains. Modest investments in digital infrastructure, marketing platforms, and networking ecosystems would directly address the sector's most pressing gaps. By lowering barriers to visibility and expanding distribution channels, government and private actors could stabilize income flows, enhance cultural exports, and strengthen the overall contribution of the music sector to Sindh's creative economy.

2.3.3 Descriptive Analysis of Cultural and Creative Industries in Punjab

Artisanal Sector (Punjab)

Sector Overview

The artisanal sector in Punjab presents a distinctive combination of low educational attainment, high creative intensity, and unusual patterns of fiscal compliance compared with other provinces. Survey findings from eight businesses reveal that only 12.5% of respondents were female, and the remaining male. Educational levels are low: half of respondents had completed only primary school, and a further 25% had completed middle school.

Production is concentrated in woodcraft (e.g., carved furniture) and jewelry-making, both of which have deep cultural and historical significance in Punjab. As in other regions, all artisans reported that their work is culturally meaningful—a finding consistent with the sector’s role as a custodian of intangible cultural heritage.

From an economic standpoint, the concentration of craft types may facilitate more targeted value chain interventions, but it also exposes the sector to demand shocks if these specific subcategories face market downturns.

Employment Structure and Production Characteristics

The workforce is overwhelmingly craftsperson-led: 88% of respondents identified as artisans, with the remainder in support or sales roles. Most operate either from home-based workshops (38%) or retail storefronts (25%).

The sector employs 25 individuals, 96% of whom are directly engaged in creative activities—a concentration notably higher than in Sindh or smaller provinces. However, all creative workers in Punjab’s artisanal sector are male, a stark gender imbalance not observed elsewhere in Pakistan. This suggests that social norms or occupational segmentation may be restricting female participation in high-value creative roles, representing both an economic inefficiency and an untapped labour pool.

For 75% of respondents, artisanal work is their primary income source. Given the handcrafted, small-batch production methods, productivity growth is constrained by labour intensity and skill acquisition rates.

Cost Structure, Profitability, and Taxation

Operating costs range from PKR 42,700 to over PKR 307,000—nearly double the range recorded in Sindh. Profit margins fall between 8% and 20%, with most firms clustering at the lower end (8–10%). This lower profitability, despite higher costs, points to competitive price pressures or rising input costs that may be eroding margins.

Punjab's artisans are unusual in Pakistan's cultural economy for their higher rate of tax compliance. Half the respondents reported paying taxes (5–10% of income), and among tax filers, 75% had benefited from tax incentives. All agreed that tax policy had a positive impact on their business growth—the only instance in the national dataset where a direct positive correlation between tax policy and firm performance is observed. This finding is significant: it implies that when tax incentives are visible, accessible, and sector-relevant, compliance can be achieved even in traditionally informal segments.

Indigenous Orientation and Digitization

Like other provinces, Punjab's artisanal sector is indigenous proper: it sources inputs locally, serves primarily domestic markets, and does not rely on exports. However, 63% of surveyed artisans reported a positive impact from digitization—a unique finding in the dataset, as artisans in other provinces report no such effect. This suggests that Punjab's artisans may be earlier adopters of e-commerce or social media marketing, opening possibilities for scale without geographic expansion.

Structurally, the sector includes a larger share of small-sized enterprises (50%)—defined here as those with an investment layout of more than PKR 2.5 million but less than PKR 50 million—compared with other provinces, where microenterprises dominate. The remaining 38% are micro-sized firms with investment levels below PKR 2.5 million. This larger capital base in Punjab could enable modest economies of scale, though all firms remain self-financed, with zero access to formal credit or public financing mechanisms. The absence of institutional finance limits expansion and modernization potential, even among firms with growth-ready infrastructure.

Market Constraints and Policy Gaps

The main barriers to export identified by respondents were lack of technology, limited networking opportunities, and insufficient understanding of intellectual property rights. Additionally, many cited negative perceptions of creative industries among government agencies as a deterrent to engagement.

Operational challenges include difficulty sourcing quality raw materials and safety concerns in local markets. From a policy perspective, Punjab's artisanal sector appears buoyant yet underleveraged: higher tax compliance, digitization adoption, and the presence of small-sized firms indicate readiness for scale, but these strengths are undermined by structural neglect and missing institutional linkages.

For this sector, low-cost, high-return interventions—such as expanding Intellectual Property (IP) education, creating sector-specific networking platforms, and leveraging public infrastructure for artisan training—could produce disproportionately large gains in productivity, market access, and fiscal contribution.

Summary Assessment

Overall, Punjab's artisanal sector stands out within Pakistan's cultural economy for its relatively higher tax compliance, early embrace of digitization, and presence of small-sized firms alongside microenterprises. These features suggest a latent readiness for formalization and scale, distinguishing Punjab from the more subsistence-oriented artisanal activity in other provinces. However, low educational attainment, gender exclusion, and the absence of institutional finance remain structural bottlenecks. With targeted policy support—particularly in skills upgrading, intellectual property literacy, and access to finance—the sector could transition from cultural preservation to a more dynamic contributor to employment, fiscal revenues, and export diversification.

Textile Sector (Punjab)

Sector Overview

Punjab's textile sector stands out as the most dynamic segment of Pakistan's cultural and creative industries, combining scale, higher levels of fiscal compliance, and significant integration with export markets. Survey data from 20 businesses show that all respondents were male, with 65% between the ages of 31 and 50 years—a profile consistent with an experienced but relatively mature workforce. The majority of firms operate within the Design and Creation segment of the apparel industry, underscoring Punjab's central role in Pakistan's broader textile value chain. Educational attainment is modest, with most respondents having completed middle school, which reflects the skills-intensive but not necessarily degree-dependent nature of the sector.

Employment Structure and Workforce Characteristics

Employment in Punjab's textile firms is dominated by wage labour. Seventy-five percent of respondents were full-time employees, while the remaining quarter were business owners—all of whom had managed their enterprises for over three years, indicating institutional stability and continuity.

Among employees, the income distribution is uneven but revealing. Roughly one-third of full-time workers reported an average monthly income of PKR 35,000 (~USD 125), slightly below Pakistan's statutory minimum wage of PKR 37,000 (~USD 132). By contrast, half reported earning above PKR 50,000 (~USD 178). This bifurcation points to a segmented labour market: lower-wage employees likely concentrated in basic production roles, while higher earners benefit from more specialized or managerial functions. Such segmentation highlights productivity differences within the workforce and underscores the importance of skill development to expand the proportion of higher-earning roles.

Business Operations and Economic Contributions

The surveyed firms collectively employed 564 workers, of whom 76% were men and 23% women. A significant share, 44% of employees, were directly involved in creative activities—a

much lower creative intensity than the artisanal or cultural sectors but reflective of the textile industry's reliance on both creative design and large-scale operational labour. Among creative workers, women comprised 22%, pointing to some degree of female participation in higher-value tasks, though still far from gender parity.

Investment structures reveal a diverse firm base: 40% of firms were micro-sized (with investment under PKR 2.5 million, ~USD 8,900), relying almost exclusively on self-financing. Only 5% of micro and small firms accessed capital from the formal sector (banks, government, or microfinance institutions), leaving most dependent on retained earnings or personal funds. Importantly, micro and small firms together accounted for just 20% of total employment, while large firms generated the majority of jobs (64%), underscoring the sector's dual structure—fragmented microenterprises on one end and employment-dominant large firms on the other.

Financial Performance and Market Dynamics

Punjab's textile firms exhibited remarkably buoyant performance in 2022–23, reporting average annual sales growth of 69% and average volume growth of 54%—the highest in the dataset across provinces. This resilience reflects both domestic demand and the ability of firms, particularly larger players, to adapt to shifting macroeconomic conditions.

Tax compliance patterns in Punjab diverge sharply from the national trend. Sixty-five percent of surveyed firms reported paying taxes—a reversal of the general informality observed elsewhere. Firms typically paid at rates between 5–10% of income. Of these, 65% successfully utilized available tax incentives, and a similar share affirmed that tax policy had a positive effect on their business performance. Only 10% reported negative impacts. This is a rare instance in Pakistan's CCIs where fiscal policy is perceived as supportive rather than extractive, suggesting Punjab has fostered a more conducive business environment in textiles.

Unlike firms in smaller provinces, Punjab's textile producers are not exclusively domestic-market oriented. Thirty-five percent of surveyed firms reported export activity, confirming the province's role in integrating Pakistan's textile value chain into global markets. Profitability levels are solid, with 40% of firms reporting margins between 11–20%.

Price dynamics reflect broader inflationary pressures. Seventy-five percent of firms reported raising product prices between 2022 and 2023, in line with Pakistan's double-digit inflation.

While this allows revenue growth, it also places pressure on domestic demand and highlights the sector's vulnerability to macroeconomic instability.

Market Constraints and Policy Gaps

Despite positive tax-policy experiences, structural challenges persist. Seventy percent of surveyed firms believe that government support remains inadequate, although this dissatisfaction is less severe than in other provinces. The primary constraints identified were limited access to finance—despite the sector's evident profitability—and rising energy costs, which erode margins and undermine competitiveness.

From an economic perspective, Punjab's textile sector combines the dynamism of strong growth, relatively high tax compliance, and export orientation, with persistent vulnerabilities tied to energy, finance, and labour market segmentation. This duality suggests that targeted reforms—such as expanding credit access, stabilizing energy supply, and addressing wage disparities—could unlock significant additional value in the province's most important CCI subsector.

Summary Assessment

Punjab's textile sector emerges as the most dynamic and structurally significant subsector within the cultural and creative industries across Pakistan. Strong annual sales and volume growth, high levels of tax compliance, and an unusual degree of export orientation distinguish it from both Sindh and the smaller provinces. The sector's dual structure—dominated by large firms that generate most employment, alongside smaller microenterprises that remain largely informal and self-financed—creates both resilience and fragmentation.

From an economic perspective, Punjab's textile industry demonstrates the capacity to function as a growth driver for national CCI exports while also highlighting persistent challenges: wage disparities among employees, limited access to finance, and energy-related cost pressures. The relatively positive experience with tax incentives in this province suggests that policy instruments can be effective if well-designed and sector-specific, offering a model for improving fiscal compliance in other provinces. Strengthening financial linkages, stabilizing input costs, and supporting skill upgrading would yield high returns in consolidating the sector's role as both a domestic employer and an export-oriented contributor to Pakistan's economy.

Food Sector (Punjab)

Sector Overview

The food sector in Punjab's cultural and creative industries represents a large but fragmented ecosystem, marked by informality, low barriers to entry, and modest profitability. Our field survey encompassed 20 businesses, all of which were male-led, with a significant proportion of younger entrepreneurs: 45% of respondents were between the ages of 18 and 30. Educational attainment was modest but higher than in smaller provinces, with 55% of respondents at least high school graduates, and 35% reporting high school as their highest level of education.

As in Sindh, the majority of firms surveyed were concentrated in the food services sector, encompassing restaurants, cafés, and similar establishments. The remainder operated in food retail, wholesale, or small-scale food production, underscoring the breadth of activities within this sector but also its fragmented and highly localized nature.

Respondent Roles and Employment Characteristics

In terms of occupational structure, 55% of respondents were business owners, while six respondents were full-time employees. Ownership stability was mixed: 54% of business owners had managed their enterprises for more than three years, while 40% were relatively new, having operated for less than three years.

The labor market outcomes of employees reveal significant wage disparities. A third of full-time employees earned less than the national minimum wage of PKR 37,000 (USD 132) per month, while the remainder earned more than PKR 50,000 (USD 213). This bifurcation mirrors what was observed in Sindh, suggesting a dual labor structure: a large share of underpaid workers alongside a smaller cadre of relatively well-compensated employees, likely tied to firm size or market orientation.

The sector employed a total of 219 workers, 99% of whom were men. Creative intensity was moderate, with 45% of employees directly engaged in creative tasks such as recipe development, food design, or presentation.

Business Operations and Economic Contributions

Estimated sales revenue for the surveyed sample in the previous financial year was PKR 19.21 million (~USD 67,400). Excluded from this estimate is one outlier firm reporting turnover of over PKR 50 million; even without this firm, Punjab's aggregate revenue surpasses other provinces, reflecting both scale and market depth.

Firm structure is dominated by small units: 65% of the surveyed enterprises qualify as micro-sized (investment under PKR 2.5 million), while the remainder are small-sized (between PKR 2.6 and 50 million). Almost all (90%) were self-financed, relying on personal savings or family networks. None had accessed government schemes, microfinance, or other forms of institutional credit.

Profitability is constrained. Over half of the surveyed firms (55%) reported slim margins of 8–10%, consistent with the highly competitive and low-differentiation nature of the food sector. A clearer picture emerges: Punjab's food enterprises are small, men-led, reliant on self-financing, and operating on narrow margins—factors that encourage rapid entry and “mushroom growth,” but inhibit the emergence of scaled, sustainable players.

Expenditure patterns reinforce this finding. Food ingredients alone accounted for 56% of average total costs, leaving little space for investment in innovation, marketing, or expansion.

Regulatory and Institutional Context

Institutional engagement with this sector reveals deep inconsistencies. None of the surveyed firms were formally registered with provincial authorities, yet 35% reported having undergone food inspections. This regulatory paradox—firms treated as food businesses for inspection purposes but not for registration—points to misaligned or poorly coordinated provincial governance. The asymmetry raises critical questions: are inspections random, are inspectors acting independently of licensing authorities, or is data simply not shared across departments?

Even more striking is that 50% of firms reported paying taxes despite not being formally registered. Among these, 20% paid less than 5% of revenue, while half paid between 5% and 10%. This suggests that fiscal contributions are being captured from the sector, but without the accompanying institutional recognition or regulatory oversight. Economically, this duality erodes the accuracy of official accounts of the sector's size and performance, while also limiting the effectiveness of tax incentives and sectoral support.

Financial Performance and Market Dynamics

Tax compliance in this sector is unusually high compared with other provinces: half of respondents filed taxes. Yet 85% identified regulatory hurdles as the greatest barrier to growth—an assessment that aligns with the contradictions already observed in registration, inspection, and taxation practices.

Firms in this sector serve almost entirely domestic and local markets; exports were non-existent. This reflects both demand-side realities—where local consumption dominates—and supply-side barriers to scaling, including regulatory gaps and resource constraints.

Marketing strategies were basic and cost-sensitive. Forty percent of firms used SMS campaigns, while 25% reported using social media. Only 20% of respondents viewed digital presence as critical for business success, a figure markedly lower than in Sindh. This divergence suggests either weaker demand for digital engagement in Punjab's food markets or less awareness among firms of digital opportunities.

Finally, 75% of respondents stated that offering discounts was an effective means of promotion. This reliance on price-based competition reinforces the earlier finding of slim margins and illustrates why firms struggle to scale. In such a context, innovation and branding are secondary to immediate price-sensitive survival strategies. In some ways, this sector is a good example of perfectly competitive conditions where price is the predominant signal. But it also signals low economic maturity of the sector.

Summary Assessment

Punjab's food sector represents a paradox within the province's cultural and creative industries. It is large in employment and revenue terms, yet structurally weak due to informality, self-financing, and razor-thin profit margins. The coexistence of tax payments without registration illustrates systemic inconsistencies that undermine both business growth and state capacity. On the demand side, the sector is hyper-localized and very price sensitive, with low digital adoption compared to Sindh. From a policy perspective, the sector's challenges are not rooted in productivity or demand, but in fragmented governance and weak institutional coordination. Targeted measures—such as harmonizing registration and inspection processes, linking tax compliance with access to formal financing, and promoting digital marketing adoption—could unlock latent growth potential in this highly competitive yet under-developed sector.

Festival Sector (Punjab)

Sector Overview

The survey encompassed five festivals from Punjab, with all respondents identifying as male organizers. Educational attainment among organizers was notably low compared with Sindh: 80% had completed at most high school, while only 20% had progressed to intermediate education.

Unlike Balochistan, KP, and GB—where 45% of festivals were organized independently without institutional or commercial backing—the picture in Punjab is markedly different. Here, 80% of festivals were organized by commercial entities, and only 20% by independent organizations. This structural difference suggests a more market-driven festival economy in Punjab compared to the community-led formats prevalent elsewhere.

Preparation times are significantly longer: only 20% of festivals required less than a month of preparation, while the majority reported four to six months. Average duration ranged between two to ten days, broadly consistent with Sindh but longer than in smaller provinces. All festivals had been organized multiple times, underscoring continuity and local demand.

In terms of scope, 60% of Punjab's festivals were multi-category, incorporating combinations of music, food, cultural activities, art, film, religious, and literary programming. This figure is lower than the multi-category share in Balochistan, KP, and GB, but higher than in Sindh, pointing to a mid-range positioning in terms of festival diversity.

Festivals in Punjab reported comprehensive coverage across all age groups. However, gender balance remained unequal. While one festival had majority female attendance, all others recorded higher male participation. This pattern reflects the broader national trend observed in Sindh, KP, Balochistan, and GB, but with an important caveat: in the latter provinces, some festivals did record women as the majority of attendees. By contrast, Punjab's festivals—with one exception—remained overwhelmingly male-dominated. This is especially stark given that women make up 47.2%¹ of Punjab's population, yet are largely absent from public-space cultural

¹ https://finance.gov.pk/survey/chapter_25/12_Population.pdf

settings in the province. These contrasts underscore how deeply norms and values influence recreational spaces. From a policy perspective, adopting a gendered lens is critical—not only to enhance cultural participation but to expand women's engagement in public life and the labor market more broadly.

Business Operations and Economic Contributions

The surveyed festivals collectively employed 349 people, of whom 59% were male and 39% female. Notably, 74% of employees were involved in creative activities, with women comprising 34% of this group. The comparatively higher female participation in creative roles stands out against other cultural sectors in Punjab.

Festival organization is a primary source of income for 100% of respondents, which contrasts with smaller provinces where organizers often treat festivals as secondary or seasonal endeavors. Despite this, the sector remains small in scale: none of the festivals generated more than PKR 500,000 (~USD 1,769) in revenue, and most relied heavily on ticket sales and vendor fees as primary income sources. This is distinct from KP, Balochistan, and GB, where food stalls often play a central revenue role.

Encouragingly, all respondents anticipated significant revenue growth in future editions, suggesting robust demand. A distinctive feature of Punjab's festival economy is its outward orientation: 60% of surveyed festivals reported bringing in international performers, while 40% engaged in cultural exchange programs—both figures markedly higher than in other provinces. This demonstrates Punjab's stronger integration into transnational cultural networks.

Financial Performance and Market Dynamics

Punjab's festivals remain predominantly local: nearly all attendees came from within 50 km of the festival site, with negligible participation from other provinces or international visitors. Attendance levels are modest but not negligible—half of the festivals attracted fewer than 1,000 people, while the remainder drew between 1,000 and 5,000, a stronger performance than Sindh.

Performances and exhibitions were relatively abundant, with most festivals featuring more than 50 performers or exhibitors.

Regarding institutional structures, 60% of festivals were formally registered as legal entities, while 40% operated informally. Importantly, every registered festival reported that the government provided adequate incentives and support for the sector, in sharp contrast to the national dataset where dissatisfaction predominates. This suggests that where formalization occurs, the government is perceived as more responsive.

Nevertheless, financial fragility remains the dominant constraint: 100% of respondents identified financial barriers as the biggest challenge to festival growth. Marketing practices reveal a reliance on mixed strategies: 60% of organizers reported using social media, supplemented by collaborations with local businesses and community events. However, digital uptake is lower here than in Sindh, KP, Balochistan, and GB, limiting potential reach beyond immediate communities.

Summary Assessment

Punjab's festival sector is distinctive within Pakistan's cultural economy: more commercially organized than in smaller provinces, with longer preparation times, greater integration of international performers, and a clear role as a primary livelihood for organizers. Yet it is also constrained by structural weaknesses.

Revenues remain modest (none exceeding PKR 500,000), financial fragility is universal, and audience bases remain highly localized. The juxtaposition of relatively high female participation in creative roles with persistent gender imbalance in festival attendance reflects both untapped social potential and restrictive cultural norms. Importantly, the high share of registered entities and their uniformly positive assessment of government support illustrates that formalization is a pathway to state recognition and institutional backing.

The challenge, therefore, is less about creating demand—which exists and is rising—and more about enabling scale through financial access, formalization, and gender-sensitive cultural policies that expand both participation and market reach.

Music Sector (Punjab)

Sector Overview

The music sector in Punjab presents a mixed picture of relative buoyancy compared to smaller provinces but remains constrained by informality, instability, and piracy. Our field survey encompassed 10 businesses, all led by male respondents. The majority (60%) were musicians, singers, or composers. Educational attainment varied: two respondents reported no formal education, two had completed high school, four had completed intermediate studies, and two held graduate degrees. While higher education is somewhat more prevalent here than in smaller provinces, the absence of systematic music education remains a structural gap.

Respondent Roles and Employment Characteristics

Half of the respondents identified as business owners, while two were full-time employees. Notably, 30% of the surveyed businesses reported that their activities were not formally registered, reflecting persistent informality in this sector. For half the respondents, music was their sole source of income, but for the majority (80%), payment was project-based rather than salaried. This irregularity of earnings makes music a volatile livelihood, subject to fluctuations in demand and seasonality of events.

Income levels highlight both opportunity and precarity: 40% reported monthly earnings around PKR 35,000 (~USD 124), below the national minimum wage of PKR 37,000 (~USD 132), while 20% earned more than PKR 100,000 (~USD 354) per month. Compared to other provinces, Punjab's musicians fare better at first glance—suggesting a more commercially active market—but the bifurcation of incomes indicates high inequality within the sector. The sector rewards a few with significant returns while leaving the majority in conditions of economic vulnerability.

Business Operations and Economic Contributions

The surveyed musicians collectively employed 49 persons, 96% of whom were men and just 4% women. While female participation was low, women accounted for 21% of those engaged directly in creative activities—a higher share than in many other provinces. This suggests that when women do enter the music workforce, they are more likely to take on core creative roles rather than ancillary tasks.

Creative intensity is particularly high: 90% of employees were directly engaged in creative production. However, due to paucity of data, we cannot provide reliable estimates of gross earnings from the sector. Still, the reliance on exclusively domestic markets is evident, with all surveyed musicians deriving their income from within Pakistan. This insularity highlights both the cultural embeddedness of Punjab's music and the lack of institutional or financial support to connect artists with global value chains.

Government Support and Policy Gaps

Perceptions of government support remain largely negative: 80% of respondents reported that policies and incentives for music were inadequate, with only 20% acknowledging any benefit. Piracy and lack of funding were cited as the most pressing challenges—distinct from KP, Balochistan, and GB, where lack of formal education was paramount. This points to structural differences: while smaller provinces suffer from weak pipelines of skill formation, Punjab's music economy is undermined more by weak institutional protections (against piracy) and lack of capital.

When asked about policy priorities, musicians emphasized support for digital platforms, mirroring the demands of Sindhi artists, alongside international collaboration and exchange. Both suggestions point to market-expansion strategies: one through digitization of domestic demand, the other through access to foreign audiences and opportunities.

Summary Assessment

Punjab's music sector demonstrates a higher baseline of commercial viability than that of smaller provinces, but this is undercut by informality, irregular incomes, and the structural threat of piracy. The presence of higher-income earners indicates latent potential for growth, yet without systemic funding, formalization, and digital support, this potential will remain confined to a narrow elite. A policy focus on protecting intellectual property, expanding digital distribution channels, and building international linkages could transform Punjab's music economy into a more stable and inclusive sector, while also enabling it to contribute more visibly to the province's cultural exports.

Gaming Sector (Punjab & Sindh)

Survey Coverage and Respondent Profile

The survey covered 10 firms operating in the gaming industry across four major urban cities. The respondent pool was overwhelmingly male (9 men and 1 woman) and skewed towards a mid-career age profile—with 70% between 31 and 50 years of age—indicative of a sector that requires both technical expertise and accumulated experience. Educational attainment was relatively high: one respondent held a master’s degree, while the remainder possessed bachelor’s degrees.

Most respondents specialized in mobile game development, reflecting the global industry’s shift toward mobile platforms as the dominant gaming market segment. The sample included business owners, independent developers, and full-time employees, all of whom relied on gaming as their primary source of income.

Business Structure and Employment Characteristics

Collectively, the surveyed firms employed 130 individuals, with 30% female participation. However, only 6% of all employees were directly engaged in creative roles—exclusively women—which points to a highly gendered distribution of creative labor and suggests that most operational roles in these firms are in technical development, management, or support functions.

The average monthly earnings of respondents were PKR 5,550,000 (~USD 20,000)—a figure significantly above average sector wages in Pakistan and reflective of the premium nature of export-oriented digital services. From an economic standpoint, these earnings signal high labor productivity in the sector, though the relatively small employment base limits broader labor market impact at present.

Economic Contribution and Taxation Practices

For 2022–23, the surveyed firms generated an estimated PKR 43.4 million (~USD 150,000) in collective revenue. The export-oriented nature of the sector means this income represents a direct inflow of foreign exchange into the regional economies of KP, Balochistan, and GB—provinces that have limited traditional export bases.

Tax compliance is notably low: only 30% of respondents reported paying taxes on their earnings. The absence of consensus on the impact of tax policy reflects a weak interface between fiscal frameworks and emerging digital industries. From a policy perspective, this points to both a missed revenue opportunity for government and a gap in sector-specific tax guidance or incentives that could encourage formalization.

Revenue Models, Market Orientation, and Challenges

The sector is entirely outward-looking, with nearly all revenue derived from international clients, particularly in North America and Europe (over 70% of total). Revenue models vary:

- 60% of firms rely on in-app purchases (averaging 11% of sales).
- 30% use subscription models (averaging 25% of sales).
- 30% depend on advertising (averaging 75% of sales for those firms).

The heavy dependence on foreign markets provides revenue stability in hard currency but also exposes firms to exchange rate volatility, foreign regulatory requirements, and platform policy changes. Key challenges identified include:

- Payment platform integration and reliability.
- Navigating foreign market regulations.
- Talent acquisition and retention, exacerbated by the global demand for gaming professionals.
- Infrastructure constraints, particularly inconsistent high-speed internet access.

Technology Adoption, Financing, and Market Adaptation

Funding is entirely self-generated, with retained earnings as the primary source and personal savings as a distant second. None of the surveyed firms accessed venture capital, crowdfunding, bank financing, or government grants—indicating limited institutional integration.

Despite these constraints, firms have adopted international marketing strategies, reinvesting an average of 14.5% of revenue into marketing, primarily targeting global audiences. The lack of

reliance on local markets has allowed these firms to bypass many domestic demand constraints, but it also means domestic ecosystem spillovers remain limited.

Summary Assessment

The gaming sector demonstrates high-value export potential but remains structurally fragile due to its isolation from domestic financial systems, infrastructure gaps, and a narrow creative labor base. Its current configuration is capable of generating competitive per-capita revenues, but without institutional support and sector-specific policy engagement, growth will remain concentrated in a small number of firms with limited job creation potential.

2.4 Conclusion and Synthesis

The descriptive analysis across provinces and sectors reveals both the diversity and the commonalities that define Pakistan's Cultural and Creative Industries (CCIs). While each subsector and province carries unique features, a number of clear comparative patterns emerge.

2.4.1 Sector-Wise Comparative Patterns

Artisan Sector

- *KP, GB, Balochistan*: deeply cultural, survivalist, entirely informal.
- *Sindh*: better education and gender diversity, but still disconnected from markets and finance.
- *Punjab*: higher tax compliance, digitization adoption, and small-enterprise growth potential.

Textile Sector

- *KP, GB, Balochistan*: small, growing, but almost entirely informal and domestically oriented.
- *Sindh*: dual economy — a small group of tax-paying firms carry most revenue; majority remain informal.
- *Punjab*: most dynamic, tax-compliant, and export-oriented; structural growth driver of CCIs.

Food Sector

- *KP, GB, Balochistan*: localized, labour-intensive, but financially excluded and inflation-vulnerable.
- *Sindh*: youthful, digitally adaptive, but fragile and heavily informal.
- *Punjab*: paradoxical high tax compliance despite informality, yet constrained by regulatory inconsistencies.

Festival Sector

- *KP, GB, Balochistan*: Community-driven, vibrant, but small-scale and financially vulnerable.
- *Sindh*: Weak participation, especially women; hyper-local with low attendance.
- *Punjab*: commercially organized, international performers engaged, but revenues remain modest.

Music Sector

- *KP, GB, Balochistan*: Culturally resilient but precarious; income volatility high.
- *Sindh*: Calls for digital platforms and marketing support; low earnings.
- *Punjab*: more buoyant, but undermined by piracy and income inequality.

Gaming Sector (Punjab & Sindh):

Pakistan's only export-oriented digital subsector. High earnings and foreign exchange inflows, but narrow employment base, gender imbalance, and zero institutional financing.

2.4.2 Dynamic Thematic Insights

From this comparative analysis, five national-level themes emerge:

1. The Dual Economy of CCIs

Punjab and Sindh anchor Pakistan's formal, export-capable CCI sectors (especially textiles and gaming), while KP, GB, and Balochistan sustain heritage-rich but economically fragile creative ecosystems.

2. The Informality Trap

Across nearly all subsectors, informality is the norm. The cycle is self-reinforcing: firms avoid taxes → receive no state benefits → remain excluded from finance → reinforced economic vulnerabilities → continue to operate informally.

3. Gender Gaps and Untapped Potential

Women remain marginalized in most CCI sectors, especially in textiles and artisanal crafts. Exceptions (festivals in Punjab, creative roles in Sindh's music sector) show that inclusivity is possible when structural barriers are addressed.

4. Digital Frontier vs. Cultural Core

The gaming industry demonstrates global competitiveness, while artisans and musicians remain largely disconnected from digital platforms. This divide captures the tension between Pakistan's traditional creative heritage and its emerging digital exports.

5. Policy Levers for Inclusive Growth

The findings consistently point to low-cost, high-return interventions:

- Linking tax compliance to tangible benefits (energy subsidies, credit access).
- Facilitating microfinance and SME lending for creative enterprises.
- Supporting digitization of traditional sectors for broader market access.
- Gender-sensitive cultural policies to expand participation and audiences.
- Protecting intellectual property (especially in music) to stabilize incomes.

2.4.3 Closing Note

Pakistan's Cultural and Creative Industries embody both resilience and fragility. They preserve heritage, employ thousands, and in sectors like textiles and gaming, generate fiscal revenues and foreign exchange. Yet without targeted policies that bridge the informal-formal divide, integrate women, and leverage digital tools, much of this potential will remain unrealized.

The evidence presented in this chapter underscores a clear truth: Pakistan's CCIs are not marginal—they are latent growth engines. With modest, well-structured support, they can evolve from cultural preservation into a pillar of inclusive, export-driven economic development.

Chapter 03: Convening a National Conference on Culture and Economic Development

3.1 Launching the Call for Papers: Context and Objectives

As part of Activity 4.1.1, Beaconhouse National University (BNU), in partnership with UNESCO's International Fund for Cultural Diversity (IFCD), issued a formal Call for Papers in preparation for the national conference titled "Culture: The Creative Engine of Economic Growth", held on April 25, 2025, at BNU's Main Campus in Lahore. The conference was conceptualized to foreground the economic significance of cultural and creative industries (CCIs) in Pakistan and to provide a platform for evidence-based academic and policy engagement on the multidimensional relationship between culture and the economy.

The call was published on January 24, 2025 in a leading daily newspaper (<https://e.thenews.com.pk/lahore/24-01-2025/page13>) and disseminated across academic, cultural, and policy networks, inviting original submissions from scholars, practitioners, and industry experts. The objective was to encourage interdisciplinary dialogue and to draw attention to the gaps in data, definitions, and policy frameworks that currently limit the strategic development of the cultural economy in Pakistan.

The call underscored four core themes, each grounded in the project's broader objective of building a policy-relevant, evidence-based framework to recognize, measure, and promote cultural and creative industries (CCIs) within Pakistan's economic landscape.

Theme 1: Culture as an Economic Driver

The first theme invited researchers to explore the direct economic value of culture, particularly through its contributions to GDP, employment, and market development. Submissions were encouraged to present data-backed models on job creation, revenue forecasting, costing strategies, and marketing plans—particularly those that addressed the informal or under-documented segments of the cultural economy.

Key subsectors identified included tourism (especially in relation to museums, heritage sites, and festivals), which have proven to be significant economic engines. Contributors were also urged to examine the potential of creative industries—such as textiles, design, publishing, jewelry, and food—to act as scalable growth sectors. Importantly, the theme emphasized the role of cultural branding in economic strategy, calling for policy pitches and narratives that could reposition Pakistan’s cultural identity in domestic and global markets.

Theme 2: Culture’s Impact on Human Capital

Technical guidelines for submissions included formatting in APA style, with a font size of 12 pt, 1.5 line spacing, and a length of 8–12 pages excluding bibliography.

The abstract submission deadline was February 13, 2025, with responses to applicants issued by February 24, 2025. Final papers were due by March 28, 2025, and selected works would be published in an open-access digital proceedings volume.

Selected submissions are available online [here](#) in a publicly accessible digital proceedings volume. For queries and submissions, a dedicated email—cfp.ifcd@bnu.edu.pk—was established. The full Call for Papers remains available at:

<https://admin.bnu.edu.pk/assets/pdf/callforpapersforunescoconference-678f511fad276.pdf>

Through this call, the project established a rigorous academic platform to not only showcase findings from earlier deliverables but also to invite external perspectives that would enrich the national dialogue around culture-led economic transformation.

3.2 From Outreach to Participation: Invitations and Conference Structure

Following the circulation of the Call for Papers, a targeted outreach campaign was launched to ensure wide and inclusive participation across academic institutions, public sector bodies, development organizations, and cultural practitioners. The objective was not only to solicit attendance from those in conventional academic and policy spaces but also to engage voices from the field—especially those working within Pakistan’s cultural and creative industries at various levels of formality and visibility.

3.2.1 Invitation Strategy and Stakeholder Targeting

Invitations were sent to a diverse set of stakeholders, including faculty members at public and private universities, researchers at cultural and economic think tanks, representatives from government bodies (including culture and planning departments), development practitioners, and artists and entrepreneurs working within creative subsectors.

Efforts were made to ensure geographic and gender representation in the attendee list. Particular attention was paid to including stakeholders from underrepresented provinces and regions, such as Gilgit-Baltistan and Balochistan, and to extending invitations to independent researchers, civil society actors, and early-career professionals.

The official conference invitation, outlining the event’s objectives, schedule, and session details, was disseminated via institutional mailing lists, personal outreach by the organizing team, and formal university channels. **A copy of the invitation can be accessed [[here](#)].**

In addition to direct outreach, the event was promoted on social media to expand its visibility and reach. Posts were shared across platforms including:

Instagram: https://www.instagram.com/p/DIIsl_NtjS0/

Facebook: <https://www.facebook.com/share/p/164wtP52kv/>

LinkedIn: <https://www.linkedin.com/feed/update/urn:li:activity:7314908144046899200>

A total of **122** stakeholders attended the event. The complete list of registrants is documented in the official [Conference Registration Sheet](#), which also served as the primary attendance record.

3.2.2 Conference Agenda and Session Flow

The conference was structured as a one-day, multi-format engagement combining academic paper presentations, practitioner insights, and forward-looking policy dialogues. The formal proceedings began with registration and networking tea, followed by two parallel panel sessions in the morning: *The Economics of Culture* and *The Impact of Culture*. These panels foregrounded key themes from the Call for Papers and were designed to set the tone for the day's discussions.

Following the morning panels, participants reconvened after a break for *Jumma* prayers and lunch to engage in a series of high-level sessions. These included **“Policy Powered by Research: Igniting Change in Pakistan”** with our partners at Pakistan Institute of Development Economics (PIDE), the **Plenary on “Culture and Creative Industries of Pakistan”**, and the concluding session, **“Pakistan Amplified: The Economic Impact of Pakistan’s Cultural Sector.”**

The full agenda, including session times and venues can be accessed [[here](#)].

3.2.3 Parallel Panels: Presentations and Key Themes

Panel 1: The Economics of Culture

Chair: Dr. Izza Aftab (Senior Expert)

This panel explored empirical and theoretical approaches to quantifying the economic contributions of culture, with emphasis on under-documented sectors such as tourism, retail, and food economies. Presentations addressed both macroeconomic potential and microeconomic modeling of cultural participation.

Early Findings from Sectoral Fieldwork: Presentation by Dr. Izza Aftab

Dr. Izza Aftab, Senior Expert for the project *“Improving Data Collection Among National and to Strengthen Provincial Statistical Agencies Policymaking for the Cultural and Creative Industries”*, funded by UNESCO’s International Fund for Cultural Diversity (IFCD), presented preliminary insights from field surveys conducted across three sectors: textiles, artisanal

production, and gaming. These findings, drawn from a limited sample of 52 firms across Khyber Pakhtunkhwa, Balochistan, and Gilgit-Baltistan, offer an early empirical window into the operational realities, constraints, and contributions of Pakistan's creative economy.

In the textile sector, the survey captured data from 20 firms employing 106 individuals, of whom 83% were men and 17% women. While 81% of employees were engaged in creative activities, women comprised only 15% of that creative workforce. Most firms were micro-sized (with investment under PKR 2.5 million), and none had access to formal sector capital. Nonetheless, they reported 20–28% annual growth in both sales and volume in FY 2022–23. Alarmingly, 82% of PKR 117 million in reported revenue went undocumented, highlighting significant undercounting in national tax records. Only 20% of firms filed taxes, and of these, just one availed a tax incentive. Respondents consistently cited energy costs and tax complexity as major business constraints.

In the artisanal sector, 22 firms were surveyed, employing 183 individuals—37.5% of whom were women. Nearly half operated in traditional fabric arts, such as *batik* and embroidery. None reported paying taxes, and the entire sector functioned outside government registration or oversight. Production was characterized as handcrafted, individualized, and culturally significant—yet largely disconnected from digital platforms and formal markets. Most firms relied entirely on local materials, operated self-financed, and reported profit margins between 8–20%.

The gaming sector, in contrast, demonstrated high growth potential and international market integration. Among 10 firms surveyed across major cities, the average monthly revenue was PKR 5.5 million (~\$20,000), with a cumulative estimate of PKR 43.4 million (~\$150,000) in revenue for FY 2022–23. However, only 30% of respondents paid taxes. Nearly all revenue stemmed from foreign markets through in-app purchases, advertising, and subscriptions. Despite profit margins exceeding 20%, the sector faced critical challenges including lack of venture financing, unreliable payment gateways, and inadequate state support. Female participation was modest—30% of employees were women, and all of the 6% engaged in creative work were female.

These findings are preliminary and based on an early phase of data collection under the project. While they cannot be generalized nationally, they provide important directional evidence to inform policy formulation, particularly regarding informality, gender disparity, access to capital, and sector-specific constraints.

Dr. Aftab's full presentation can be accessed [[here](#)].

Presentations Included:

Complementing Dr. Aftab's presentation, the panel featured the following scholarly contributions:

- *The Economics of Culture – Dr. Anjum Altaf*
- *Uncovering the Potential of Tourist Industry as an Economic Driver: Pakistan – Dr. Iram Naseer Ahmed*
- *Growth Culture as Bounded Unit Interval of Coefficient of Relative Risk Aversion – Mirza Adil Ahmed Mughal*
- *Role of Cultural Inclusivity in Fostering Economic Growth: Comparative Analysis of Singapore and Pakistan – Dr. Musarat Amin & Dr. Zhao Leibin*
- *Harnessing Cultural Diversity for Tourism: Lessons from India for Pakistan's Economic Growth – Dr. Qudsia Akram & Ms. Ramsha Tariq*
- *Revolutionizing Sustainable Commerce: UI/UX Framework for Secondhand Retail – Fahad Zakir & Ahsan Imtiaz*
- *The Economics of Gastro-Craft Retail: Stitching Commerce into Cuisine – Izza Bajwa*

Panel 2: The Impact of Culture

Chair: Mr. Zaeem Yaqoob Khan (Project Lead)

This session focused on the cultural sector's contributions to social development, community identity, and workforce preparedness. Topics ranged from traditional crafts and tourism to education, language policy, and soft power diplomacy.

Project Architecture and Institutional Integration: Presentation by Zaeem Yaqoob Khan

Zaeem Yaqoob Khan, the Project Lead for the UNESCO-funded initiative *Improving Data Collection Among National and Provincial Statistical Agencies to Strengthen Policymaking for the Cultural and Creative Industries*, provided an in-depth presentation outlining the project's motivation, trajectory, and achievements. He contextualized the project within BNU's longstanding engagement with the cultural sector through prior initiatives such as Pakistan's Creative Future Programme and partnerships with international bodies including UNESCO and the World Craft Council.

The project was one of only eleven selected globally from 610 proposals submitted to IFCD's 13th Call. Zaeem highlighted the project's core goals: establishing functional definitions of "culture," "creative trades," and "cultural goods"; developing a nationally grounded yet globally comparable data collection instrument; and mapping the economic and social contributions of Pakistan's cultural and creative sectors. The project team comprises senior and junior researchers, statisticians, and field enumerators, structured their approach to ensure both national relevance and international comparability.

He further elaborated on the multi-stage research design, which included literature reviews, stakeholder consultations, pilot surveys, and the rollout of a revised national survey across six key creative sectors—textiles, artisans, music, gaming, food, and festivals. The project not only introduced a first-of-its-kind framework for capturing data in these areas, but also ensured alignment with international benchmarks such as UNESCO's 2009 Framework for Cultural Statistics. Zaeem emphasized the project's responsiveness to field realities—such as rewording overly academic survey items—and detailed lessons learned in navigating informal and under-documented sectors.

Importantly, he concluded by sharing that these refined survey instruments have already been formally shared with the bureaus of statistics of two of Pakistan's largest provinces, marking a critical step toward institutional adoption and long-term policy integration.

The full presentation by Zaeem Yaqoob Khan can be accessed [[here](#)].

Presentations Included:

The following papers were presented as part of the panel led by Mr. Zaeem Yaqoob Khan:

- *Crafting Identity: The Role of Traditional Crafts in Economic Growth and Cultural Preservation* – Tehreem Fatima
- *Cultural Heritage and Local Growth – Lessons from Uch Sharif* – Yasmin Cheema & Usman Sami
- *Cultural Capital and Economic Growth: The Role of Indian Culture in Driving Economic Development* – Dr. Rizwan Naseer & Sharjeel Siddiqui
- *EFL Policy Initiatives and Workforce Readiness* – Daima Hussain
- *FilmIndustry as a Tool for Cultural Integration and Soft Power* – Shireen Mushtaq & Aimen Iqbal
- *Reviving Bhamala and Floating Market Development in Khanpur Dam* – Maira Khan
- *Creative Economy: A Myth of Unexplored Opportunity* – Neha Malik

Each presenter was allocated 10 minutes for their presentation, followed by a 5-minute Q&A moderated by the session chair. This format ensured concise delivery and encouraged focused audience engagement.

Keynote Address: UNESCO's Commitment to Cultural Policy and Data-Driven Development

As part of the opening plenary of the conference “*Culture: The Creative Engine of Economic Growth*”, Mr. Jawad Aziz, Representative of UNESCO Pakistan, delivered a keynote address highlighting the strategic significance of the ongoing project funded through UNESCO’s International Fund for Cultural Diversity (IFCD). His remarks underscored the centrality of reliable, disaggregated data in informing national cultural policy and empowering creative entrepreneurs with evidence-based insights.

Reflecting on Pakistan’s 2022 ratification of the 2005 UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions, Mr. Aziz emphasized its pivotal role in recognizing the dual nature of cultural goods—as both economic commodities and vital expressions of identity and heritage. He recounted UNESCO’s multi-year collaboration with Beaconhouse National University (BNU), beginning with the Korean Funds-in-Trust project in 2015, which culminated in Pakistan’s eligibility to apply for IFCD funding. BNU’s successful grant application in 2023 enabled the launch of this project focused on strengthening cultural data infrastructure.

“Reliable data is essential, not only for governments to design informed and inclusive cultural policies, but also for individual creative businesses to make strategic decisions to sustain and scale up,” he stated.

He further commended the consultative approach adopted in developing the project’s survey instruments and emphasized that the Pakistan Bureau of Statistics must assume ownership to institutionalize data collection in the sector. Mr. Aziz also noted that the project’s timing is particularly opportune given the Government of Pakistan’s renewed interest in mapping the cultural and creative industries. UNESCO is currently working in collaboration with the Ministry of Planning, Development, and Special Initiatives to support this broader mapping initiative.

“UNESCO remains committed to supporting Pakistan’s culture and creative sector through policy dialogue, institutional capacity-building, and partnerships,” he concluded.

3.2.4 Speaker Profiles and Interdisciplinary Contributions

The parallel panel sessions convened a cohort of scholars and practitioners whose disciplinary breadth reflected the complex intersections between culture, policy, and economic development. Presenters included senior academics, development economists, design researchers, historians, and cultural theorists—each contributing empirical and conceptual insights rooted in distinct methodological traditions.

Institutional affiliations spanned leading public and private universities in Pakistan and abroad, with contributions from faculty and researchers associated with institutions such as Forman Christian College, Riphah International University, Kinnaird College for Women, and other regional and international academic bodies.

This diversity not only enriched the conversations but also reinforced the conference's core principle: that culture and creativity are not peripheral to economic development—they are embedded within its fabric.

Full speaker bios for each panel can be accessed via the following links:

[Panel 1 – The Economics of Culture](#)

[Panel 2 – The Impact of Culture](#)

3.2.5 Logistical Planning and Presentation Protocol

Each room was equipped with laptops and projectors, with staff available to assist with technical setup. Chairs were responsible for time management and facilitating discussion. All sessions were conducted in English and Urdu.

The logistical clarity and academic framing of the sessions created a productive space for dialogue, paving the way for more integrative engagements in the afternoon plenary and policy roundtable.

3.3 Conference Proceedings: Selected Papers and Presentations

A total of **21 papers** were received in response to the Call for Papers. Submissions were reviewed based on a set of clear evaluation criteria, including originality of content, alignment with conference themes, and academic rigor. Particular attention was paid to the **similarity index**, use

of **AI-generated content**, and **plagiarism screening**, ensuring all selected work met scholarly standards of integrity and contribution.

Following this review process, selected papers were included in the official conference proceedings. The full proceedings have been compiled in a single document and are available in the attached PDF: [**\[Conference Proceedings – Full Volume\]**](#).

To ensure transparency and facilitate future academic referencing, a dedicated **conference dashboard** has also been developed. This dashboard provides a structured overview of all paper titles, author names, corresponding emails, similarity reports, and submission details. The dashboard can be accessed [**\[here\]**](#).

In addition, all **PowerPoint presentations** delivered by the authors during their panel sessions have been compiled and are available [**\[here\]**](#).

In addition to formal documentation, the **conference proceedings** were also shared via the university's official social media platforms to ensure wider accessibility and public engagement with the project's findings.

Instagram: <https://www.instagram.com/p/DK883-FMQ5t/>

Facebook: <https://www.facebook.com/share/p/1656YUtyMt/>

LinkedIn: <https://www.linkedin.com/feed/update/urn:li:activity:7340272258659057665>

3.4 Panel 3: Policy Powered by Research: Igniting Change in Pakistan

The panel titled “*Policy Powered by Research: Igniting Change in Pakistan*”, scheduled in the post-lunch session of the conference, was chaired by Dr. Faheem Jehangir, Project Director, RASTA (Research for Social Transformation and Advancement), and Director Policy at the Pakistan Institute of Development Economics (PIDE).

This session aimed to explore the critical nexus between research and policymaking in Pakistan, with a specific focus on how evidence-based initiatives like RASTA can catalyze structural and developmental reforms.

Designed as a conversational-style panel, the session was moderated by Dr. Izza Aftab and provided a platform for Dr. Jehangir to introduce the scope, achievements, and policy impact of RASTA. Topics discussed included the program’s history, funding structure, project portfolio, gender dynamics among principal investigators, and success in supporting under-researched sectors such as textiles, music, gaming, food, festivals, and artisans. The conversation further examined how research funded by RASTA has contributed to understanding Pakistan’s informal economy and tax structures, making it highly relevant to the broader themes of the conference.

Dr. Faheem Jehangir’s full presentation can be accessed [[here](#)].

3.5 Panel 4: Pakistan amplified: The economic impact of Pakistan’s cultural sector

Panel 4 tackled the fundamental challenge of defining culture and the creative industries in the Pakistani context. The session began by interrogating essential questions: Is culture about identity, norms, and values? Does religion influence culture or vice versa? Is culture the glue that holds society together—or is it society itself? These philosophical provocations framed the panel’s broader exploration of the role of cultural and creative industries (CCI) in Pakistan’s economy.

Drawing on inputs from communities across the country—from Gilgit-Baltistan to the Makran coast—the panel noted that when Pakistanis are asked to define CCI, they often point to traditional cultural markers: *ajrak*, rural lifestyles, food, pink salt, carpet weaving, embroidery, and religious tourism. However, the repeated invocation of these symbols and the persistent follow-up question

of “and?” highlights the sector’s definitional limitations and the need to expand the national imagination around what constitutes CCI.

This panel brought together experts who have navigated and shaped the CCI landscape in distinct ways, including:

- Salima Hashmi, Professor Emeritus and Director, UNESCO Madanjeet Institute of South Asian Art
- Dr. Tamkenat Mansoor, a prominent content creator
- Khaula Jamil, photojournalist
- Yaser Awan, Director of Innovation, Takhleeq Problem Solving Institute

Panelists were invited to articulate their own definitions of CCI and explain how their work contributes to the sector. They discussed the processes through which ideas, skills, and cultural content are transformed into tangible goods, services, and experiences for public consumption. Each panelist had either created a new market, identified a niche in an existing one, or achieved measurable success in their respective fields—positioning them as credible voices on the economic significance of cultural production.

The discussion also examined how CCI can democratize access to opportunity in Pakistan by providing viable alternatives to traditional career paths. The panel concluded with a Q&A session, inviting further dialogue on the intersection of culture, economy, and policy.

3.6 Conclusion: Toward Policy-Driven Cultural Transformation

The national conference “Culture: The Creative Engine of Economic Growth” served as a pivotal platform for surfacing insights, testing assumptions, and consolidating the project’s evidence-based approach to cultural policy reform. By convening a broad spectrum of scholars, practitioners, and policymakers, the event helped validate the project’s core premise: that Pakistan’s cultural and creative industries are economically significant, yet structurally

underrecognized. The diversity of perspectives—ranging from empirical analyses to lived experience—underscored the urgency of integrating CCIs into national development discourse.

The conference outcomes will inform policy dialogues, support the institutional uptake of project findings, and help embed cultural economy considerations into future planning frameworks at both federal and provincial levels. In doing so, the conference marked not just the conclusion of Activity 4.1.1, but a strategic milestone in the broader effort to reframe culture as a lever of inclusive, sustainable economic growth in Pakistan.

3.7 Photo Highlights from the Conference

Below are select visuals capturing key moments from the conference, including keynote addresses, panel discussions, audience engagement, and networking sessions.



Image 1: Panel 1: The economics of culture attendees listening to the post-presentation discussion.



Image 2: Token of appreciation presented to Mr. Usman Sami (author) by Salima Hashmi on behalf of the Project Leads.



Image 3: Mr. Ahsan Imtiaz presenting in Panel 1: The Economics of Culture



Image 4: Token of appreciation presented to Ms. Daima Hussain (author) by Salima Hashmi on behalf of the Project Leads.



Image 5: Project team and conference attendees gather for a group photo at the close of the event.



Image 6: Dr. Iram Naseer Ahmed (author) receiving a token of appreciation from Salima Hashmi on behalf of the Project Leads



Image 7: Ms. Shireen Mushtaq presenting in Panel 2: The Impact of Culture



Image 8: Conference attendees listening to the presented paper



Image 9: Dr. Qudsia Akram presenting in Panel 1: The Economics of Culture



Image 10: Chair of Panel 2 moderating the discussion



Image 11: Dr. Anjum Altaf (author) while presenting in Panel 1: The Economics of Culture



Image 12: Tehreem Fatima (author) while presenting in Panel 2: The Impact of Culture



Image 13: Attendees in Panel 1: The Economics of Culture



Image 14: Chair of Panel 1: The Economics of Culture moderating the discussion



Image 15: Tehreem Fatima (author) presenting in Panel 2: The Impact of Culture

042-38100156 EXT. 431

Main Campus

13 KM Off Thokar Niazbeg-

Raiwind Road, Lahore - 53700,

Pakistan.