



EMEA PUBLICATION UNDER THE INVESTMED PROJECT – POLICY PAPER: 04  
**CULTURAL AND CREATIVE INDUSTRIES IN  
EGYPT, LEBANON AND TUNISIA: THE ROLE  
OF THE EU IN BUILDING AN ENABLING  
ENVIRONMENT FOR THE EMERGENCE OF  
A REGIONAL CREATIVE HUB**

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## 1 BACKGROUND

Cultural and Creative Industries (CCI) are considered as one of the major sectors in the economy and are receiving substantial attention from policy makers in advanced economies.<sup>1</sup> The underlying sectors are argued to not only boost creativity and innovation but are also seen as a source of positive spill-over to the economy as a whole (Power, 2011). According to the Creative Economy Outlook 2022, the creative economy is one of the fastest-growing sectors worldwide and creative services have shown more resilience than other services sectors during the COVID-19 pandemic.

Many economies have identified CCI as a high-potential strategic sector. According to the global mapping conducted by Ernst & Young in 2015, although the sector is the least developed in the region of Africa and the Middle East, it has generated a revenue of 58 billion dollars and 2.4 million jobs in 2013 (Lhermitte et al., 2015). The potential of the sector is far from being fulfilled, as demand is growing with the emergence of a middle class “hungry for culture”.

National and international organisations show keen interest in CCI, such as the European Union (EU), UNESCO, the World Intellectual Property Organisation (WIPO), American for the Arts, The UK Department for Digital, Culture, Media & Sport (DCMS), OCDE, KEA, UK National Endowment for Science, Technology and the Arts (NESTA) and UNCTAD amongst others. The 74th session of the UN General Assembly in 2019 witnessed the declaration of 2021 as the International Year of Creative Economy for Sustainable Development, reflecting the importance given to the CCI by the international community.

The contribution of the CCI to society can take two different forms: economic, in terms of job creation and value added in the economy; and non-economic, in terms of social development, social inclusion and social cohesion, development of national identity, cultural diversity, fostering innovation and creativity and positive spillovers to other sectors of the economy.

Creative and cultural industries (CCIs) possess distinct characteristics that make them particularly noteworthy to policymakers. One notable feature is their potential to promote inclusivity, given that the youth employment rate within Creative Industries is often higher compared to other sectors of the economy. As a result, in countries grappling with high rates of youth unemployment, CCIs can play a significant role in addressing this issue.

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<sup>1</sup> According to official statistics, the creative industries sector contributed to 5.6% of the UK economy in 2021. (House of Lords Library, 2022)

Furthermore, CCIs exhibit higher levels of productivity in comparison to other sectors. For instance, in 2011, South Korea's film and television workers demonstrated exceptional productivity, with their average earnings surpassing the national average by more than twofold (see Oxford Economics, 2011). This emphasises the economic significance and potential for growth within the CCI sector.

Another distinctive aspect of these industries is the prevalence of independent and self-employed workers. However, this characteristic also renders them more vulnerable, lacking access to social safety nets. The COVID-19 outbreak highlighted this vulnerability and brought it into the spotlight, underscoring the need to address the support and protection mechanisms for workers in these sectors.

The Southern Mediterranean countries, specifically Egypt, Lebanon, and Tunisia, possess significant potential in the field of creative and cultural industries (CCI), owing to their rich cultural heritage and young demographic profile. However, this potential remains largely untapped, as these countries lack a national definition for CCIs and a specific strategy to promote and develop these industries.<sup>2</sup> Additionally, there is a scarcity of data to effectively monitor the contributions of CCIs and further strengthening of Intellectual Property Rights (IP) is required.

In this context, the European Union (EU) can play a crucial role in supporting CCI actors in the region. By providing assistance and expertise, the EU can help pave the way for the establishment of a creative hub in the Southern Mediterranean region, enabling these countries to harness their full creative potential. This support would not only benefit the development of the CCI sector but also contribute to the overall growth and prosperity of the region.

## 2 ASSESSMENT OF CCI IN EGYPT, LEBANON AND TUNISIA

Creative and cultural industries (CCI) hold great importance in Egypt, Lebanon and Tunisia, encompassing various sectors such as design, fashion, crafts and more, which not only preserve cultural traditions but also contribute to job creation, innovation and sustainable development. However, one of the significant challenges faced in measuring the importance of CCIs in these countries is the scarcity of data. According to a mapping exercise conducted by UNIDO in 2015, clusters

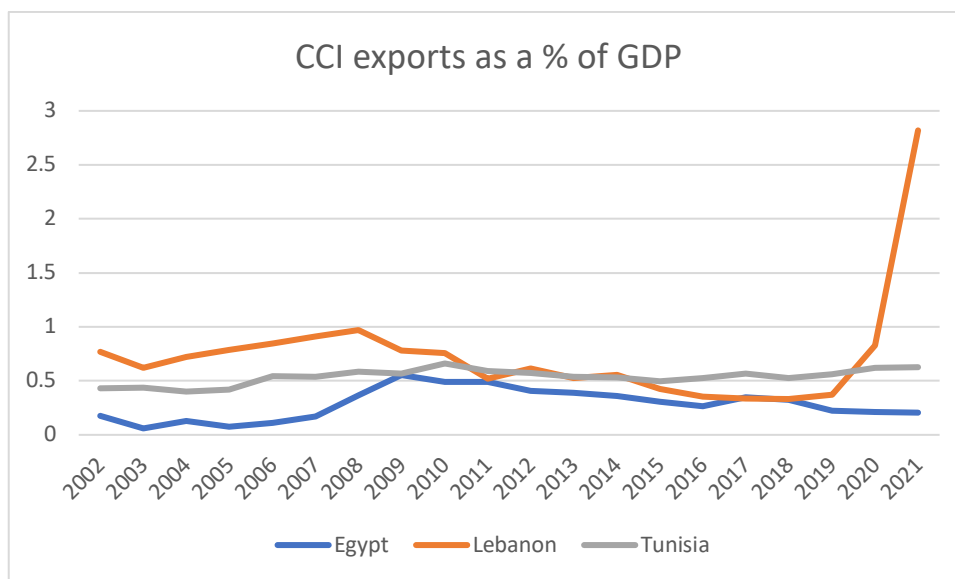
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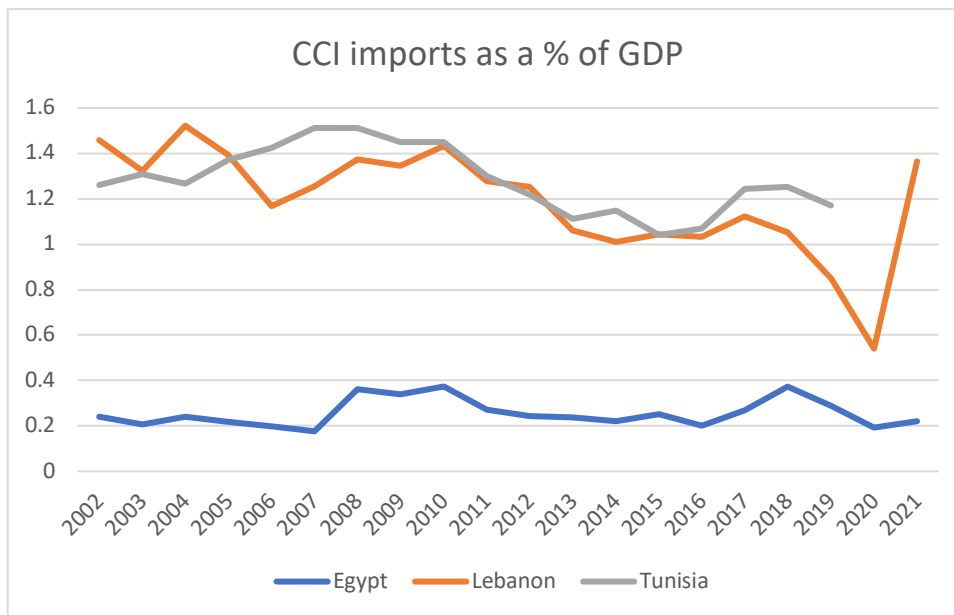
<sup>2</sup> There are strategies to promote a specific sub-sector, for instance handicraft in Egypt, but a national scale strategy for the Creative economy as a whole is missing.

of creative and cultural industries (CCI) were identified in the North Africa region, specifically in Egypt, Lebanon and Tunisia. The study revealed that a majority of the identified clusters in these countries were centered around design-based industries. These included sectors such as clothing, jewelry, shoes, furniture, decoration, crafts, home textiles and more. These industries showcased a concentration of creative activities and demonstrated potential for economic development and growth in the region.

The United Nations Conference on Trade and Development (UNCTAD), provides detailed statistics on the contributions of Creative economy to exports and imports, represented in Figure 1 and Table 1. Overall, exports in creative goods have increased in the past decade and in 2021 represented 0.2%, 2.8% and 0.6% of GDP in Egypt, Lebanon and Tunisia respectively (the high number in Lebanon is due to the multiple crisis situation in the country and the strong devaluation of the currency, coupled with a decline in the GDP. The number prior to the crisis was 0.37% of GDP in 2019).

**Figure 1-CCI Export and Imports as a percentage of GDP**





**Source:** UNCTAC Creative Economy Outlook 2022 and World Development Indicators for GDP data

**Note:** the sharp increase in the case of Lebanon is due to the multiple crisis situation (including currency crisis) and the sharp decline in GDP associated with the crisis situation

## Egypt

Egypt has a very rich cultural heritage, hosting 6 UNESCO World Heritage sites, including the Pyramid Fields from Giza to Dahshur (considered one of the Seven Wonders of the World). The handicraft sector is argued to be one of the most promising industries in Egypt, as it is historically well-established, labour intensive, can be scaled up, and has a high export potential. The sector’s exports are around USD 400 million per year (Abdelaziz et al., 2018). The size of the local handicrafts market was estimated to be around USD 168.5 million in 2017<sup>3</sup> with over 80% of sales carried out by outbound tourists, whilst locals make up 16% with only 2% of sales being business-to-business (TDMEP, 2018), hence the sector relies heavily on tourism and was hit hard during the COVID-19 pandemic.

Egypt is a regional hub for producing Arabic-speaking television series and movies (Creative Economy Outlook, 2022). It is the first country in the MENA region to have established a successful film industry. Indeed, Cairo was referred to as the “Hollywood of the Arab World” with the golden ages of Egyptian cinema from the 1940s to the 1960s. However, the film industry in Egypt has long been

<sup>3</sup> 3 billion Egyptian Pound - the adopted exchange rate is 1 USD equivalent to 17.8 Egyptian Pounds.

burdened by bureaucratic hurdles and censorship. The process of obtaining permits for film production remains highly complex, involving multiple authorities, such as the Censorship Authority, Prefectures, police stations, and various Ministries and syndicates. These administrative challenges have created obstacles and hindered the growth and development of the industry (Ghazala, 2017; Allam, 2019; El Khachab, 2017). The country hosts a number of film festivals, with the most famous ones being “the Cairo International Film Festival” (<https://www.ciff.org.eg/>) supported by the public sector and “El Gouna Film Festival” (<http://elgounafilmfestival.com/>) supported by the private sector. In the light of the COVID-19 pandemic, the cinematic industry has suffered greatly from the lockdown measures (EMEA, 2021a). Meanwhile, the acceleration in the digital transition has created an opportunity for the media producers, with more and more films being digitally produced and distributed. Video on Demand (VOD) has become a source of revenue for film makers (Allam, 2019).

### **Lebanon**

In the case of Lebanon, the country has emerged as a significant regional player in various creative and cultural industries (CCI) sectors, such as design, advertising, architecture, fashion, gastronomy and publishing (UNIDO 2015). However, this growth and momentum can be primarily attributed to private enterprise<sup>4</sup> and international initiatives. Governmental support for CCI institutions is nearly non-existent. Despite the vibrant CCI scene in Lebanon, the lack of robust governmental backing has posed challenges for the industry's development (EMEA, 2021c).

Lebanon possesses a rich talent and expertise in design that is renowned throughout the Middle East and the Arab world, although its full potential remains untapped. The country's exports rely heavily on precious metals and stones, which constitute approximately 39% of its total exports. Within this sector, jewelry design plays a significant role, benefiting from a cluster of highly skilled designers and artisans, who offer their expertise at a competitive cost. Lebanon stands out as a leader in jewelry and gold production in the Middle East, employing around 8,000 individuals, including 2,000 qualified jewelers, who work in approximately 60 main workshops (Blominvest Bank, 2016). The fashion industry in Lebanon also enjoys a strong international reputation, with designers like Elie Saab, Zuhair Murad, Rami Kadi and others gaining global recognition. The country hosts a fashion cluster that supports the growth and development of this sector. Additionally, emerging fields, such as furniture and object design, have witnessed significant progress, with international exhibitions being organised to foster their advancement in recent years.

Lebanon is renowned as a centre for media in the Middle East, with well-developed sectors including television broadcasting, advertising services, audio-visual production, publishing, music

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<sup>4</sup> One example is the Beirut Creative Cluster : <https://beirutcreativecluster.org>

production and digital media. In 2014, these industries accounted for 3.75% of Lebanon's GDP (WIPO, 2017), employing approximately 3.25% of the country's labour force. Advertising expenditure in Lebanon ranks amongst the highest in the region, with a total spending of USD 174.1 million in 2016 (Arab Media Outlook 2016-2018). The media sector in Lebanon holds significant economic and cultural importance, contributing to the country's creative landscape and overall economic growth (EMEA, 2021c).

Lebanon has been facing multiple crises - even before the onset of the COVID-19 pandemic (Ayadi and Challita, 2020). The country has been grappling with a currency crisis, a banking crisis, social unrest and political instability. These challenges have had a profound impact on various sectors, including the cultural heritage and creative industry. The devastating explosion that occurred in Beirut on August 4th further exacerbated the situation, causing significant damage to museums, creative spaces and the overall cultural infrastructure (Mady, Abboud, and Bauer, 2020). The estimated damage to the Cultural and Creative Industries alone amounts to a staggering 1 to 1.2 billion USD (World Bank, 2020). Consequently, Lebanon has witnessed a significant brain drain, as talented young individuals and families have either left the country or are actively considering doing so.

### Tunisia

CCIs in Tunisia have gained increasing attention from the public sector, as highlighted in the strategic note of the five-year development plan. The plan acknowledges the importance of culture under the policy axis of "Human Development and Social Inclusion" with a focus on the cultural dimension of creation, openness and rootedness. However, despite this recognition, the public authorities have not officially acknowledged the significance of CCIs. The handicraft market has become saturated, leading to efforts in reconstruction and digitalisation. The gaming industry, in particular, shows immense potential, with a significant increase in offerings and a large community of players, for example, the « League of Legends » alone attracts over 100,000 players in Tunisia (EMEA, 2021b). Additionally, the country's cultural heritage holds great potential, requiring long-term strategies and state-sponsored initiatives. Many national and international initiatives are active in the country and the entrepreneurial ecosystem has benefitted from governmental initiatives, such as the "Start-up Act", within recent years.

In terms of job creation, the Cultural Industries employ approximately 25,000 workers, with around 14,000 being full-time employees (AFDB, 2019).

### 3 MAIN CHALLENGES

Having a clear definition for the CCI forms the basis for policy development, which allows the industry to thrive. It is important to identify a unified definition for CCIs, according to the profile of each country. Finding an appropriate definition for the sector has been a source of discussion. Different institutions came up with different definitions. In Egypt, Lebanon and Tunisia, there is currently no universally accepted definition for Cultural and Creative Industries (CCI). To ensure that the CCI sector receives the recognition and attention it deserves, it is imperative to establish a nationally accepted definition. Having a clear and agreed-upon definition will help position the CCI sector as a priority area for policy development and public support. By adopting a specific definition, these countries can provide a framework for identifying and promoting the diverse range of cultural and creative activities that contribute to their economies and societies. This will facilitate targeted policies, resource allocation and strategic initiatives to foster the growth and development of the CCI sector in each country. This can also allow individuals to perceive working in the undelaying sectors as a viable and interesting career path.

The term ‘creative industries’ was first used by the UK Labour government in 1997, through minister Chris Smith (1998) and the Department for Culture, Media and Sport (DCMS). The first mapping for UK, published in 1998, defined the creative industries as “those industries which have their origin in individual creativity, skill and talent which have a potential for job and wealth creation through the generation and exploitation of intellectual property” (DCMS 2019). This definition subsequently became the most common definition. (See Hartely et al., 2013).

The definition of the European Parliament for “cultural and creative sectors means all sectors whose activities are based on cultural values and/or artistic and other creative expressions, whether those activities are market- or non-market-oriented, whatever the type of structure that carries them out, and irrespective of how that structure is financed. Those activities include the development, the creation, the production, the dissemination and the preservation of goods and services which embody cultural, artistic or other creative expressions, as well as related functions such as education or management. The cultural and creative sectors include inter alia architecture, archives, libraries and museums, artistic crafts, audiovisual (including film, television, video games and multimedia), tangible and intangible cultural heritage, design, festivals, music, literature, performing arts, publishing, radio and visual arts” (Power, 2011)

UNESCO approach defines CCIs as “sectors of organised activity whose principal purpose is the production or reproduction, promotion, distribution and/or commercialisation of goods, services and activities of a cultural, artistic or heritage-related nature” (2012, 2017). Singapore’s classifications



distinguish the 3 main classes of: Arts and Culture; Media and Design. We find this 2-layer definition for CCI particularly useful, as the positive spillovers of each class towards the other sectors of economy are different, with the Design class offering the highest direct spillovers. Hence, based on the available literature, we adopt the following classification for CCI (see Table 2).

**Table 2-** Suggested CCI classes and subsectors

|    | CCI classes      | CCI sectors            |
|----|------------------|------------------------|
| 1  | Arts and culture | Cultural heritage      |
| 2  |                  | Gastronomy             |
| 3  |                  | Visual arts            |
| 4  |                  | Performing arts        |
| 5  |                  | Leisure and recreation |
| 6  |                  | Crafts                 |
| 7  | Design           | Software               |
| 8  |                  | Advertising            |
| 9  |                  | Architecture           |
| 10 |                  | Interior design        |
| 11 |                  | Graphic design         |
| 12 |                  | Industrial design      |
| 13 | Fashion          |                        |
| 14 | Media            | Publishing             |
| 15 |                  | TV & radio             |
| 16 |                  | Digital media          |
| 17 |                  | Film and video         |
| 18 |                  | Music                  |

**Source:** Authors, based on various classifications available in the literature

Another significant challenge impeding the development of cultural and creative industries (CCI) in the South Mediterranean region in general, is the prevailing issue of censorship and extensive monitoring by authorities, which severely restricts the freedom of artistic expression. One example of this extensive monitoring is the process for obtaining a film permit in Egypt, which remains very complex and requires permits from the Censorship Authority, Prefectures and police stations, as well as several Ministries and syndicates (El Khachab, 2017). Table 3 reports the “World Press Freedom Index” and its global ranking. In the year 2023, Egypt, Tunisia and Lebanon obtained rankings of 162, 114 and 108 respectively, out of a total of 180 countries. The rankings indicate a concerning low level of press freedom in these nations, which can also have repercussions extending beyond the media industry to other CCI sectors, as well as the business and investment climate, and overall socio-political stability.

**Table 3 - World Press Freedom Index 2023**

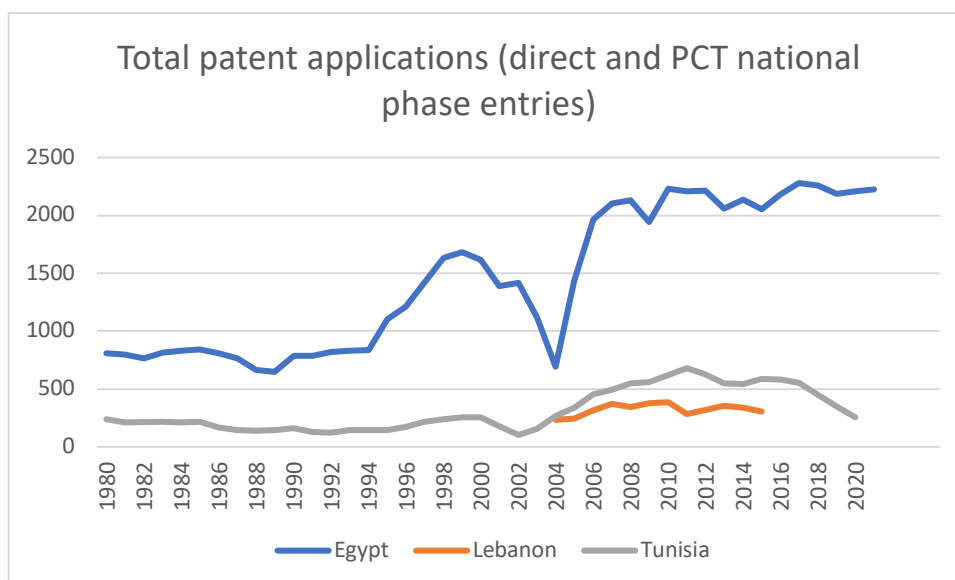
| Country | 2023 World Press<br>Freedom Index<br>Score | Rank out<br>of 180 | Rank<br>evolution | Score<br>evolution |
|---------|--|--------------------|-------------------|--------------------|
| Lebanon | 50.46                                      | 108                | 11                | 3.88               |
| Tunisia | 50.11                                      | 114                | -27               | -8.38              |
| Egypt   | 33.37                                      | 162                | 2                 | 3.14               |

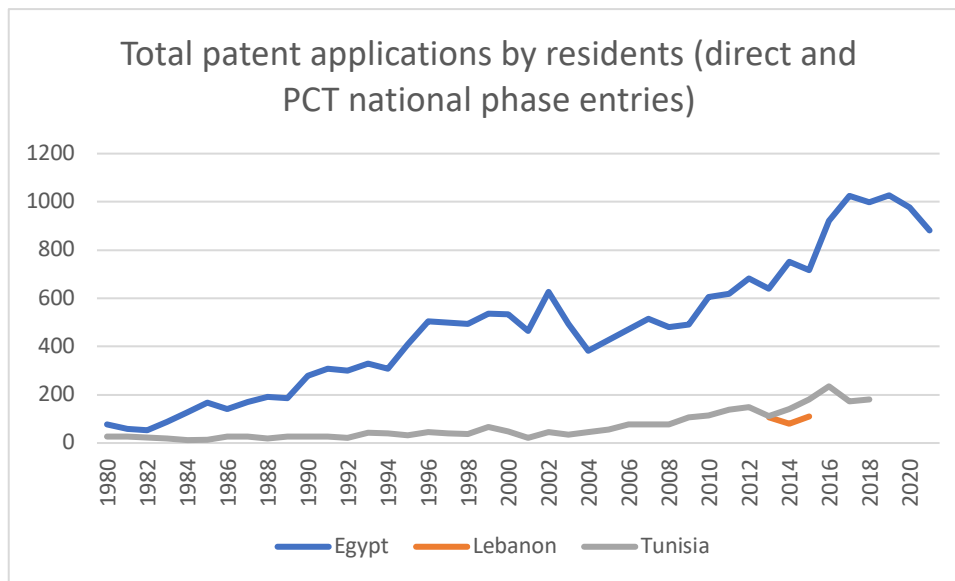
*Source: Reporters without boarder (<https://rsf.org/en/index?year=2023>)*

Effective Intellectual Property Rights (IPR) regulation plays a pivotal role in fostering the growth of cultural and creative industries (CCI) by safeguarding and incentivising innovation, creativity and the economic potential of intellectual assets. One of the challenges for creative industries in the South Mediterranean region is the weak intellectual property (IP) protection framework. This is especially the case in Lebanon, since the country is notably absent from the list of 153 contracting countries of the Patent Cooperation Treaty (PCT), the 128 signing parties of the Madrid Agreement and the 91 countries adopting the Hague Agreement (WIPO website).

With the rapid digital transition, this challenge is taking on new dimensions, as the scope and application of intellectual property rights (IPRs) in the digital environment are unclear (Spennemann, 2019). IPRs play a crucial role in safeguarding creativity and original works, but the current IPR system was primarily designed for an analogue environment, posing challenges in the digital era. The rise of digital reproductions, widespread sharing and evolving business models, like streaming, have created new complexities for copyright experts. In the music industry, for instance, artists were traditionally compensated through royalty fees for each sold phonogram. However, in streaming platforms, royalties are no longer tied to downloads, but instead, negotiated as a percentage of user subscription fees. This shift can leave independent artists with limited bargaining power when dealing with music labels or streaming services. Moreover, emerging technologies give rise to additional complexities, like the question of whether used e-books can be resold, the liability of platforms for unauthorised uploaded content and whether data mining utilising artificial intelligence requires copyright fees. In order to thrive in the creative industry, especially in the digital landscape, content providers must possess a strong grasp of the legal aspects of IP and actively stay informed about best/good practices in the field. Once we look at the evolution of a number of IP applications, Figure 2, we observe a stagnation that calls for help in knowledge sharing and cost reduction in the process of IP application.

**Figure 2 – Total number of patent application**





Source: WIPO's IP Statistics Data Center (<https://www.wipo.int/ipstats/en/>)

Digital piracy is another threat faced by creative workers globally as it is incredibly easy to unlawfully copy and share digital content. As such, it is imperative that the regulatory systems in every country prioritise the protection of creative workers and effectively discourage unlawful piracy practices. This necessitates a comprehensive approach that includes robust enforcement measures, public awareness campaigns and the promotion of legitimate channels for accessing and consuming digital content. By actively combating digital piracy, countries can foster an environment that safeguards the rights and livelihoods of creative workers, whilst nurturing a sustainable and vibrant creative ecosystem.

The dominance of informality within the cultural and creative industries (CCI) poses a significant challenge, both at the national level and specifically amongst CCI workers. This prevalence of informality results in the exclusion of these workers from formal structures, denying them access to essential benefits and protections. In order to address this issue and create a more inclusive environment, it is crucial to establish a robust social safety net, tailored to the needs of CCI workers. By providing adequate social protection measures, such as healthcare, retirement benefits and unemployment insurance, we can enhance the public perception of CCI as an attractive and viable career path.

## 4 POLICY RECOMMENDATIONS

In this section, we develop 2 sets of policy recommendations both at country level and the European Union level. Indeed, the EU can also play an active role in pushing the national CCI agenda in Egypt, Lebanon and Tunisia by dedicating targeted support to the underlying sectors and by regarding them as priority sectors.

Our recommendations at the country level are:

1. **Adopt a national definition of CCI:** It is crucial for these countries to officially adopt a clear and comprehensive definition of CCI. This will provide a solid foundation for identifying and categorising activities within the sector, enabling policymakers to better understand its scope and implement targeted policies and initiatives. A well-defined definition will also facilitate data collection, research and monitoring of the CCI's contribution to the economy, allowing for evidence-based decision-making. Furthermore, it will send a positive signal to the public and improve the perception of working in the creative sector as a viable career path.
2. **Elaborate a specific social security scheme for independent CCI workers:** Given the dominance of informality within the CCI, it is essential to establish a social security scheme that specifically targets independent workers in the industry. This scheme should include measures such as access to healthcare, retirement benefits and unemployment insurance. By providing adequate social protection, these countries can improve the livelihoods and economic security of independent CCI workers, enhancing their well-being and encouraging them to pursue sustainable careers within the sector (for more details on such scheme refer to Ayadi, El Mekkaoui and Frouheshfar, 2023).
3. **Strengthen IP management:** Intellectual Property (IP) is a critical aspect of the CCI sector, protecting the rights of creators and incentivising innovation. Therefore, it is crucial for Egypt, Tunisia and Lebanon to strengthen their IP management systems. This involves improving the enforcement of existing IP laws, raising awareness amongst CCI stakeholders about the importance of IP protection and streamlining the registration and enforcement processes. It is important to be up-to-date regarding international treaties and agreements and to include specific measures targeting digital piracy and protection of digital content. Additionally, supporting capacity-building programmes and providing resources for CCI workers to navigate IP-related challenges will contribute to a more robust and

effective IP management framework, fostering creativity, innovation and sustainable growth within the sector.

At the European level:

4. **Establish Creative cluster programmes between both shores of the Mediterranean:** The EU can play a pivotal role in promoting collaboration and exchanges between creative workers from the EU countries and those from Egypt, Tunisia and Lebanon. By establishing Creative cluster programmes, the EU can create platforms for networking, knowledge-sharing and capacity-building. These programmes will not only encourage creative workers but also help change the mindset about the value and potential of the CCI sectors. The collaboration and exchanges facilitated by these programmes will foster a vibrant creative ecosystem on both sides of the Mediterranean, leading to increased creativity, innovation and economic growth.
5. **Establish digital Intellectual Property (IP) help desks:** With the rapid advancement of digital technologies, the protection of IP rights has become increasingly complex. To support creative workers in Egypt, Tunisia and Lebanon, as well as those inside Europe, the EU should establish digital IP help desks. These help desks would provide tailored support and guidance on IP issues related to the digital domain. They can assist creative workers in understanding their rights, navigating copyright laws and addressing challenges specific to the digital era. By offering accessible and specialised support, the EU can empower creative workers to protect their digital creations and ensure fair remuneration in the evolving digital landscape.

By implementing these policy recommendations at the EU level, the EU can contribute to the development and growth of the cultural and creative sectors in Egypt, Tunisia and Lebanon.

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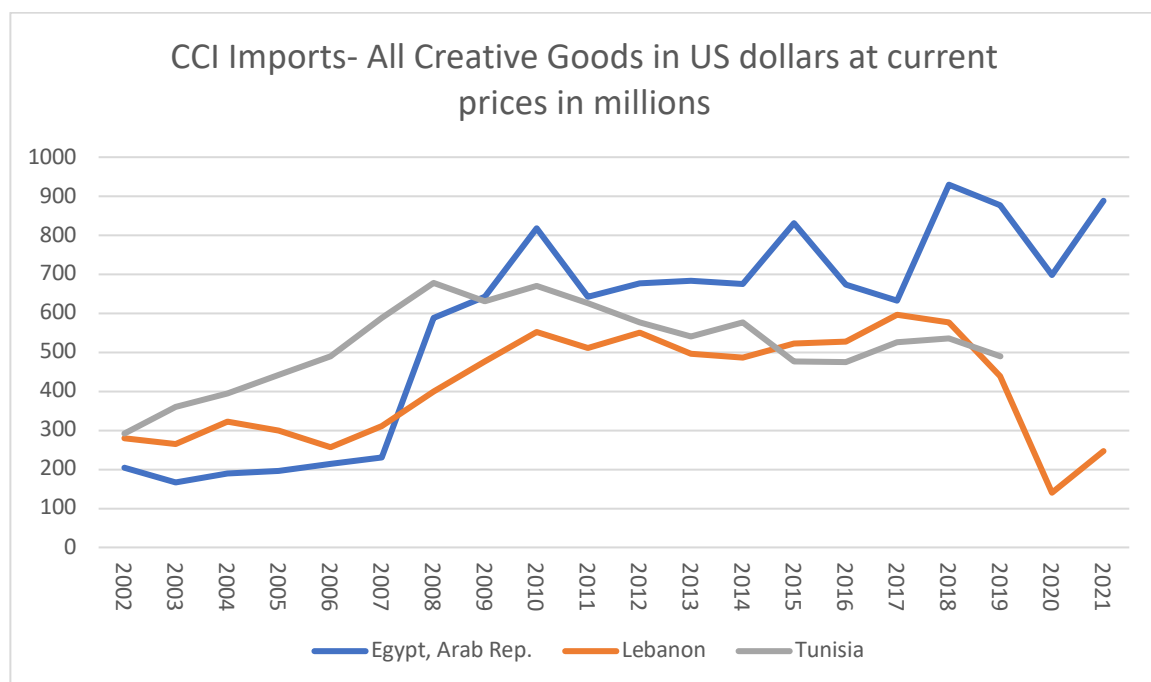
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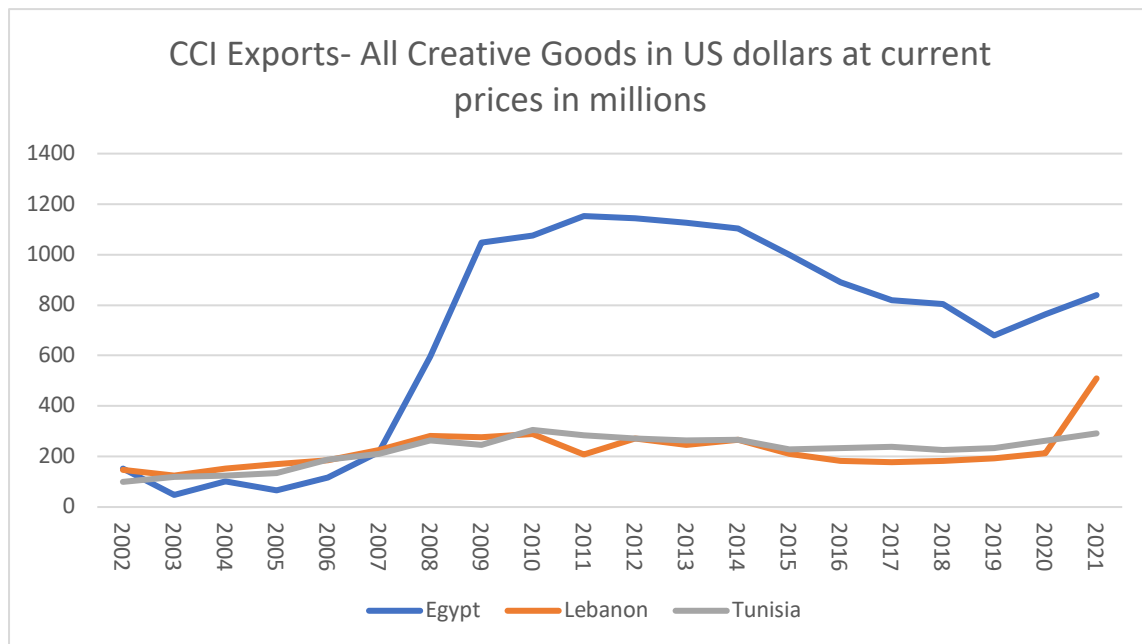
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## 6 APPENDIX A – CCI IMPORTS AND EXPORTS

In this Appendix, we present the evolution of CCI exports and imports in USD and its composition in different sectors.

**Figure 1A-** CCI imports and exports in USD





Source: UNCTAC Creative Economy Outlook 2022 and World Development Indicators for GDP data

**Table 1A-** Creative Goods exports by sector in 2021

| Exports in 2021- in US dollars at current prices in millions |                  |                 |                   |
|--|------------------|-----------------|-------------------|
|  | Tunisia          | Lebanon         | Egypt             |
| <i>All creative goods</i>                                    | 292.44436        | 509.62538       | 839.20713         |
| <b>Art crafts</b>  | <b>30.303521</b> | <b>6.790748</b> | <b>255.139494</b> |
| Carpets  | 4.441938         | 2.535064        | 231.432162        |
| Celebration  | 0.126571         | 0.885843        | 1.252546          |
| Other art crafts   | 1.785745         | 2.566482        | 0.740672          |
| Paperware  | 0.001615         | 0.000247        | 0.377746          |
| Wickerware   | 0.397294         | 0.073479        | 3.346061          |
| Yarn   | 23.550358        | 0.729633        | 17.990307         |
| <b>Audiovisuals</b>  | <b>0.166303</b>  | <b>0.427774</b> | <b>1.749363</b>   |

|                        |                   |                   |                   |
|------------------------|-------------------|-------------------|-------------------|
| Film                   |                   |                   |                   |
| CDs, DVDs, tapes       | 0.166303          | 0.427774          | 1.749363          |
| <b>Design</b>          | <b>161.105139</b> | <b>457.850716</b> | <b>548.122139</b> |
| Architecture           |                   | 0.51354           | 0.018364          |
| Fashion                | 89.786489         | 3.355506          | 98.273015         |
| Glassware              | 0.00083           | 0.532024          | 25.942677         |
| Interior               | 22.078562         | 310.230804        | 411.642913        |
| Jewellery              | 2.212626          | 141.293235        | 11.359696         |
| Toys                   | 47.026632         | 1.925607          | 0.885474          |
| <b>New media</b>       | <b>89.893977</b>  | <b>2.143044</b>   | <b>2.622461</b>   |
| Recorded media         | 74.667564         | 1.783194          | 2.621663          |
| Video games            | 15.226413         | 0.35985           | 0.000798          |
| <b>Performing arts</b> | <b>0.097522</b>   | <b>0.106581</b>   | <b>0.282998</b>   |
| Musical instruments    | 0.097522          | 0.106581          | 0.282898          |
| Printed music          |                   |                   | 0.0001            |
| <b>Publishing</b>      | <b>9.849324</b>   | <b>33.188488</b>  | <b>17.249766</b>  |
| Books                  | 5.029614          | 32.297516         | 13.837458         |
| Newspaper              |                   | 0.041482          | 1.484081          |
| Other printed matter   | 4.81971           | 0.84949           | 1.928227          |
| <b>Visual arts</b>     | <b>1.028578</b>   | <b>9.118028</b>   | <b>14.040904</b>  |
| Antiques               |                   | 0.490318          | 2.014244          |
| Painting               | 0.007388          | 4.962912          | 11.629846         |
| Photography            | 0.171546          | 0.030838          | 0.042413          |
| Sculpture              | 0.849644          | 3.63396           | 0.354401          |

Source: UNCTAD- Creative Economy Outlook 2022

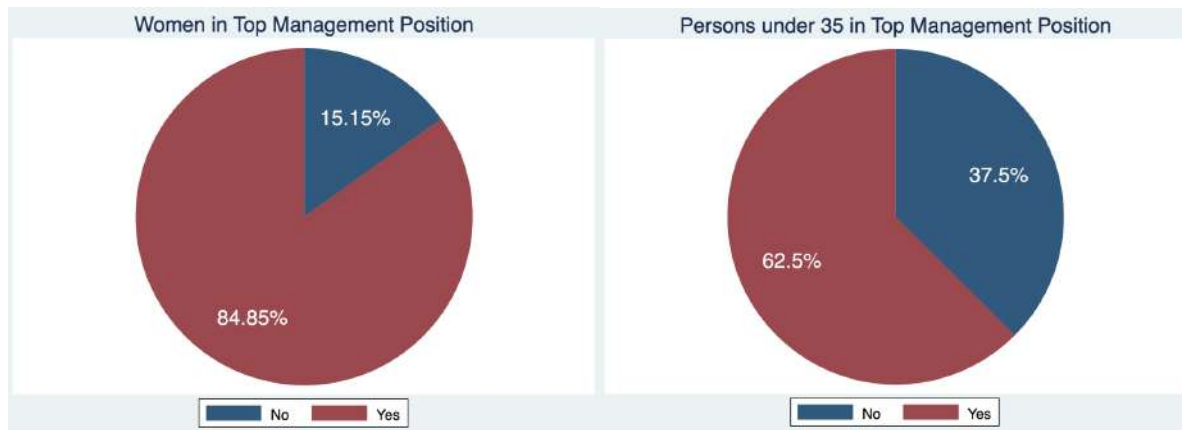
## 7 APPENDIX B- INVESTMED SURVEY RESULT

The [INVESTMED policy paper survey](#) was distributed amongst INVESTMED sub-grantees active in green, blue and creative sectors in Egypt Lebanon and Tunisia. 33 answers were collected and some of the responses relative to CCI are presented in this Appendix.

**Table 1B-** Distribution of respondents by country and sector of activity

|              | Blue     | CCI       | Green     | Total     |
|--------------|----------|-----------|-----------|-----------|
| Egypt        | 1        | 5         | 1         | 7         |
| Lebanon      | 0        | 3         | 9         | 12        |
| Tunisia      | 2        | 6         | 6         | 14        |
| <b>Total</b> | <b>3</b> | <b>14</b> | <b>16</b> | <b>33</b> |

**Figure 1A-** Women and youth proportion in the respondents



**Table 2B-** Crucial factors to build an enabling environment for CCI

|   | Crucial | Fairly important | Low importance | Not important | I don't know |
|---|---------|------------------|----------------|---------------|--------------|
| Recognition of the underlying sectors as high potential by the government | 12      | 1                | 1              | 0             | 0            |

|  |    |   |   |   |   |
|--|----|---|---|---|---|
| Improving public mindset about the high potential of CCI to be a viable career | 12 | 1 | 0 | 0 | 1 |
| Improving soft and entrepreneurial skills                                      | 9  | 3 | 0 | 0 | 2 |
| Availability of funding  | 10 | 3 | 0 | 0 | 1 |
| Quality control process for raw materials                                      | 9  | 3 | 1 | 0 | 1 |
| Strengthening Intellectual Property Rights                                     | 8  | 4 | 1 | 0 | 1 |
| Access to cultural spaces  | 11 | 1 | 0 | 1 | 1 |

*Note: This table displays responses to this question amongst entrepreneurs active in CCI: Which factors are most important for building an enabling environment for CCI?*

**Table 3B-** Most important stakeholders within the CCI ecosystem

|  | High support | Good support | Low support | No support | I don't know |
|--|--------------|--------------|-------------|------------|--------------|
| Government and public policies               | 7            | 1            | 3           | 3          | 0            |
| Business incubators                          | 7            | 4            | 2           | 1          | 0            |
| Banks and financial intermediaries           | 2            | 4            | 5           | 3          | 0            |
| Private investors                            | 3            | 6            | 1           | 2          | 2            |
| Universities & teaching institutes           | 4            | 3            | 4           | 2          | 1            |
| International organisations (EU, US AID etc) | 8            | 5            | 1           | 0          | 0            |

*Note: This table displays responses to this question amongst entrepreneurs active in CCI: In your opinion, to what extent are the following players in the entrepreneurship ecosystem supporting the development of the cultural and creative economy in your country?*



## CULTURAL AND CREATIVE INDUSTRIES IN EGYPT, LEBANON AND TUNISIA: THE ROLE OF THE EU IN BUILDING AN ENABLING ENVIRONMENT FOR THE EMERGENCE OF A REGIONAL CREATIVE HUB

EMEA-INVESTMED Policy Paper, July, 2023

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# ABOUT INVESTMED

Mediterranean MSMEs face important challenges in terms of competitiveness, sustainability, internationalization and capacity to innovate while urgent measures are needed to tackle common environmental challenges and untap the potential of both natural and cultural heritage to contribute to sustainable growth and economic development. Against this backdrop, the INVESTMED project aims at addressing both economic and environmental challenges, by supporting new, sustainable business opportunities for young people and women in three Mediterranean Partner Countries: Egypt, Lebanon and Tunisia.

The INVESTMED Project (InNoVative Sustainable sTart-ups for the MEDiterranean) is co-funded by the European Union under the ENI CBC Mediterranean Sea Basin Programme 2014-2020. INVESTMED has a duration of 30 months, with a total budget of €3.8 Million, of which €3.4 Million (90%) is funded by ENI CBC MED. It has 8 partners from Tunisia, Spain, Lebanon, Greece, Egypt, and Italy:

- Union of Mediterranean Confederations of Enterprises, BUSINESSMED (TU)
- Euro-Mediterranean Economists Association, EMEA (ES)
- European Institute of the Mediterranean, IEMed (ES)
- Beyond Group / Irada Group S.A.L, BRD (LE)
- Institute of Entrepreneurship Development, IED (GR)
- Libera Università Maria SS. Assunta, LUMSA (IT)
- Confederation of Egyptian European Business Associations, CEEBA (EG)
- Spanish Chamber of Commerce, CCE (ES)

INVESTMED will have an impact on MSMEs, start-ups and recently established enterprises where staff will be trained and coached to become more sustainable and competitive and financially supported via an open competition. Specific business incubation services will also be established for sustainable start-ups as well while relevant public authorities will benefit from capacity building and exchange of best practices to facilitate access and protect IPR for MSMEs.

The **Euro-Mediterranean Economists Association – EMEA** is a Barcelona-based regional think-tank that serves as a leading independent and innovative policy research institution; a forum for debate on the political and socio-economic reforms in Mediterranean and Africa; and promoter of actions and initiatives that fulfil objectives of sustainability, inclusiveness, regional integration and prosperity.

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