منتدى الاستراتيجيات الأردني
JORDAN STRATEGY FORUM

Creative Industries

Jordan's Economic Vision Roadmap

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The Jordan Strategy Forum (JSF) is a not-for-profit organization, which represents a group of Jordanian private sector companies that are active in corporate and social responsibility (CSR) and in promoting Jordan's economic growth. JSF's members are active private sector institutions, who demonstrate a genuine will to be part of a dialogue on economic and social issues that concern Jordanian citizens. The Jordan Strategy Forum promotes a strong Jordanian private sector that is profitable, employs Jordanians, pays taxes and supports comprehensive economic growth in Jordan.

The JSF also offers a rare opportunity and space for the private sector to have evidence-based debate with the public sector and decision-makers with the aim to increase awareness, strengthening the future of the Jordanian economy and applying best practices.

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This is an expert opinion report based on discussions and focus group meetings held by the Jordan Strategy Forum (JSF). The overall objective of this effort is to analyze different sectors (14) of the Jordanian economy and their respective challenges, and come-up with practical solutions and initiatives to enhance their competitiveness. Throughout this exercise, the JSF facilitated the focus group meetings, and supported the work-stream managers with any needed research and logistics.

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Table of Contents

1. Introduction

The creative industries sector is one of the fastest-growing sectors globally. Jordan's creative industry provides a great-untapped potential to (a) contribute to Jordan's knowledge-economy, (b) build the country's innovation capacities and competitive edge across sectors, and (c) reap benefits on a socio-economic, cultural, and development level. Its benefit on both a community and commercial level is the reason for its rapid adoption as a core economic and strategic pillar in national strategies across the globe. For definitions on sub-sectors that make up the creative industries, see Annex I.

Jordan's economy is based on limited natural resources, relatively small manufacturing industry, and a commensurately small market and client base. Jordan's economic development has thus depended on **building knowledge-based industries** (which include the creative economy) that require high technical skills and human capital. Global trends show that the creative economy is one of the fastest growing economies, both in advanced and emerging economies. This demonstrates an opportunity for Jordan to participate in these high-growth sectors and attract a market share of this expanding global market.

Creative Industries are the hallmark of a country's innovation, and are therefore a primary component of any country's **competitive edge** in the global marketplace through trade and intellectual property. Creative industries should therefore be thought of as an infrastructural component in the economy, embedding values of innovation, creativity, problem-solving, and effective storytelling and communication into all other sectors. Beyond economic benefits, becoming a regional pillar with a strong voice in creative industries such as media, design, advertising, branding, digital economy, and culture offers a **soft power** for Jordan and builds cultural legacy. Fringe benefits in attracting tourism and investment are the direct result of such image building and influence.

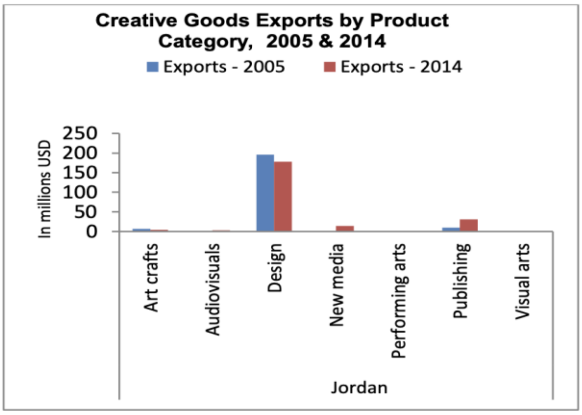
Furthermore, small businesses and individual entrepreneurs are critical to every country's economy, and the creative industries, which is composed of many talented self-employed freelancers and entrepreneurs, is a big **contributor to the entrepreneurship ecosystem**. Furthermore, the creative industries have a **high percentage of youth employment** and a more **balanced gender employment ratio**. A well-supported creative industry contributes to the **overall GDP and job market** by creating jobs and increasing both internal and export-driven expenditures. The creative job market therefore provides a **multiplier effect for other industries**. By investing time and effort in promoting and supporting the creative industries, other industries and businesses stand to become better equipped with more marketable products and increased consumer interest.

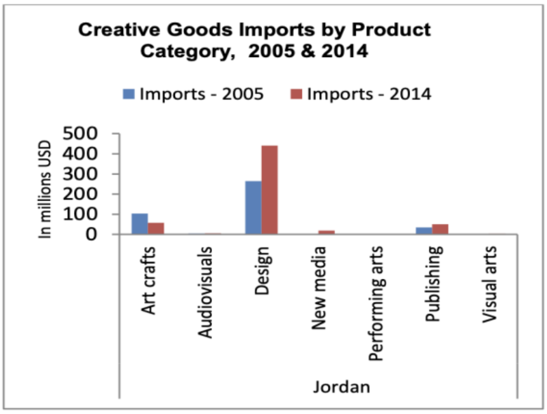
Finally, creative education cultivates young imaginations and enhances students' academic achievements in multiple subject areas. A national strategy that embeds the critical-thinking, communication, and innovation skills essential to a **productive 21st-century workforce** has been proven to be a successful and sustainable strategy for alleviating poverty, revitalizing urban and rural areas, building healthy ecosystems and space spaces for leisure and entertainment, combating extremism, improving quality of life, health and wellness standards, and civic engagement. The creative economy can build more inclusive, connected, collaborative societies.[1]

[1] Creative Economy Outlook, 2014. UNCTAD.

2. Performance of the sector in the past 5 years & COVID-19 impact

The scope, potential, and uptake of creative industries around the world is expanding. This is particularly true of advanced economies, and increasingly so for developing economies. In Jordan, there is a large absence of updated statistics and studies on the creative industry in Jordan. Data from a 2012 WIPO study indicate that 'copyright industries' contribute 3% of overall GDP, which exceeds several other industries including mining, electricity, and water, and is close to the agricultural sector at 3.5%. 2 One study by creact4med (see Annex II) which remains uncited draws projections for its place in GDP, growth, value-added to the economy, and job-creation, although the definition of creative industries is not clear.





2014 indications show that the largest creative industry is functional arts/ design, which accounts for 73% of total creative goods exports in 2014 ($230.7 million). Jordan exports design goods, jewelry, and interior design for an estimated value of $168 million. The top three trading export partners are the United States, Saudi Arabia, and Iraq, whereas the top three trading import partners are Italy, United Arab Emirates, and Saudi Arabia.[3]

Film production in Jordan has produced more than 272 million USD until 2020, and has created over 111,965 (daily basis job opportunities). The last quarter of 2019 hosted 18 global productions which produced over 35 million USD, and created 7000 jobs directly.[4] Other significant export sectors include publishing and new media, as well as the fashion and the textile industry.

<u>The effects of COVID-19</u> - In the past three years, COVID-19 has had a negative impact on the industries in the following primary ways:

[2] The Economic Contribution of Copyright-Based Industries in the Hashemite Kingdom of Jordan, 2012. WIPO.
[3] Creative Economy Outlook, 2014. UNCTAD.
[4] Report by Royal Film Commission, 2020.

1. The increased cost of raw materials, shipping costs, and inconsistent and difficult customs procedures and policies, harmed manufacturing production-based design industries (furniture, product, fashion, jewelry design).
2. The creative services and events industry**,** which is a primary industry under which many creative players find employment, has been halted. This is also true of the performing arts and cultural practices, and is particularly damaging as this is a core industry that employs and carries a suite of other sectors / industries.
3. The decline in tourism has been detrimental, as it is an essential revenue generator for all creative industries including film, creative services and events, performing arts, as well as a market-provider for design and art products.

Most importantly, adverse effects on the creative industries tends to create a **multiplier effect** on other industries. For example, advertising and media have a direct impact on business cycles and their absence does so equally.

The effects of COVID-19 on the creative economy was mitigated to some extent by the rise in consumption of traditional and digital media and content creation. Trends show a rise in the consumption of film, TV, and video games, as shared by Tamatem's CEO, Hussam Hammo. This trend has been witnessed worldwide according to a report published in 2021 by Deloitte.[5] Service-based creative providers who have been able to work remotely have not been affected as deeply. Furthermore, Jordan enjoys a relatively high digital adoption rate due to investments in IT infrastructure.

The film industry is showing significant potential for growth, primarily due to the existence of a strong regulatory and representational body (the Royal Film Commission) and the introduction of significant market players such as Netflix. However, there have been many lost opportunities, clients, and access to funding, cited due to government interference, bureaucracy, and slow adoption and implementation. The film industry is a strong industry that can carry forward a slew of other creative sub-sectors including media, design, art, cultural practitioners, musicians, PR and marketing agencies, videographers, audio-visual experts, graphic designers, and many more.

The design sector has witnessed significant growth in the last five years, in large part due to international attention, funds and investments, and infrastructural and promotional projects such as 'Amman Design Week' which started in 2016.

[5] The Future of the Creative Economy, 2021. Deloitte.

Production-based design / functional arts is largely held back by the weakness of the manufacturing industry and the high cost of raw material, coupled with the small market for such products locally and large amount of low-cost competition with products from Turkey and China. Innovation in this sector is difficult as factories struggle to meet demand and are not encouraged to innovate and work with designers on customized products and experimental prototyping. The slow adoption of new technologies, lack of investment in manufacturing industries, low capital, and the lack of pride in manufacturing, result in low-quality products. Furthermore, product, furniture, fashion, and jewelry design are not taught in Jordanian universities, while industrial design is only offered at Yarmouk University. This stems from the high investment needed for unique facilities and machinery, as well as a lack of infrastructure to prepare students for the rapid technological advancement. The most successful product and furniture designers are in fact architects or designers from other disciplines. Product and furniture design could potentially see a transformation with laser cutters and the entry of 3D printers, though most experienced parties cite extreme difficulties, unclear import/export rules, and bureaucratic barriers to obtaining high-tech machinery of the sort.

In terms of service-based design, architectural practices are the strongest as they are underpinned by the construction industry, and are therefore the most mature of the relevant service-based design industries. It boasts a high and continuous demand for architecture, strong level of exports, several key players, and a strong stone industry. However, real-estate developers and construction professionals undermine the importance of disciplined architects and often bypass their engagement in building. Architectural education is considered stronger than other higher-level educational programs in the country. As a discipline, it has been taught for many years and is considered prestigious as it falls under the domain of engineering, unlike other creative industries which remain largely misunderstood and underappreciated. However, architectural education in Jordan has failed to modernize and develop its curriculum to compete at a global level.

The second tier of mature design industries in Jordan consists of those linked to the information technology and telecommunication sectors, namely visual communications, graphic design, web design, and advertising. Jordanians are being increasingly recognized locally and abroad for their professionalism and high-level technical skills in these domains. This is mostly due to investment in education and the support from the relatively mature IT industry. It is relatively low cost for universities to invest in graphic design programs, which don't require a high capital investment. Since the industry does not depend on any manufacturing costs, it is a highly exportable service, with a large market expansion opportunity. Despite its growth, the local market does not provide strong opportunities due to misperception of the importance of visual communications and its impact on business. Animation design and motion-graphics is an emerging discipline that is well supported and poised for growth, both from an IT industry perspective and because of the fact that the film industry in Jordan is among the strongest creative industries.

The weakest sectors in Jordan are largely held back due to social perceptions, the prioritization of security, and the lack of attention and support offered to the building of a flourishing cultural portfolio. These include the creative services and events sector, which had begun to see some growth before the COVID-19 pandemic, the performing arts and cultural practices sector, and visual arts or art-making. It was estimated that the global live events lost $30 billion USD in 2020.[6] Despite this perceived weakness, these industries offer the quickest and largest opportunity for growth upon the return of tourism.

These industries are largely held back by the lack of appropriate cultural spaces and venues, as well as the bureaucracy in allowing music and cultural programming to take place in our cities. It is an underdeveloped sector that contributes largely to the brain drain, creating gaps across its value chain (artist representatives, art buyers, creative agencies, galleries, theaters and venues, business support and creative consultants, recording and production support, etc.).

"The fundamental driver of creative economy growth remains that when consumers have more to spend, and have increasingly sated their demand for other goods and services, they are more likely to spend that additional income on outputs of the creative economy."[7]

[6] Concert Industry Lost $30 Billion in 2020, Variety, https://variety.com/2020/music/news/concertindustry-lost-30-billion-2020-1234851679/
[7] The Future of the Creative Economy, 2021. Deloitte.

3. Stakeholders' mapping for the sector: linkages & overlaps

The creative industry sector is synergetic with almost all other industries, as it provides the necessary processes that yield innovation and adoption of new products and services. It should therefore be viewed as a sector that provides infrastructure to the rest of the Jordanian economy. For the purpose of outlining the synergies with other industries, the sub-sectors are divided into three main categories; **media-based creative products, production-based creative products, and service-based creative products**. See Annex I.

To understand the stakeholders of the creative industry, one must first understand the creative economy value chain found in Annex III. The creative economy is expanded on the demand side by several industries: a growing population and **construction sector** (demand for more architects, planners, furniture designers, product designers), **investments in the technology sector** (demand for more computer programmers, digital designers, concept creation), **an improved ICT sector** (media-based creative products), **increased tourism** (market for crafts, design products, heritage goods, events), and **increased trade facilitation** and opening to export new markets for consumption. Creative industries are also expanding along with the expansion of the **digital and shared economies**.

The reverse relationship is also true, where creative industries can work to serve and create efficiencies and demand for the other economic sectors. For example, offering better infrastructure for events can make Jordan more attractive for tourism, new innovative technologies can support the medical sector (leading to cross-sectoral intellectual property), or a strong software and computer programming sector can make Jordan a more attractive place for producing media or films. Additionally, the creative sector can create a multiplier effect in **urban and social development**.

Furthermore, growth in one part of the value chain listed above can stimulate growth in other parts. Sector efficiencies and synergies are created upon improving the **manufacturing sector** (production standards and quality), which in turn can not only increase consumption but also provide the tools needed to stimulate innovation in concept creation. Improving **transportation** networks and efficiencies (aggregation and distribution) can in turn increase consumption.

From the supply side, the industry that underpins the creative sector is the **education sector.** Improvements in this sector begin with instilling creativity in primary education and continue on to increasing investments in higher education that open doors for research, innovation, and the protection of intellectual property. It builds the basis for producing talent to meet market demands.

Within the creative industries themselves, there are some sub-sectors that within their production tend to utilize and carry forward other sub-sectors, and therefore should be prioritized strategically. As an example, the film industry provides jobs for other sub-sectors including designers (stage design, digital design), creative-services (food, events, marketing, etc.), and the media sector (promotion, advertising, videography). The events sector is also an important sub-sector that employs and serves a variety of other sectors such as tourism, hospitality, logistics, and design to name a few.

4. SWOT analysis

Strengths	Weaknesses
1. Human resources: There exists a large young, competent, talented, and diverse workforce in some sub-sectors of the creative industries. The film and design sub-sectors have gained significant recognition and have developed capacities to absorb more projects, with good reputation and talent. **2. Legal/regulatory:** Jordan has passed several laws in compliance with international commitments to the protection of intellectual property rights. **3. Technical:** There is a high degree of digital adoption - many creative industry jobs are service-based and ready for the digital transition accelerated by the pandemic. These include graphic design, architecture, consulting, marketing, PR, media, audio-visual, etc. **4. Financial:** There are low barriers for entry for youth, and good foundations for entrepreneurship and a significant number of accelerators, incubators, and funds to support their development and growth, particularly in the technology sector which intersects with many creative industry sub-sectors.	1. **Structural:** Creative industries lack official support, representation, and coordination, and are not part of a larger government vision or strategy. 2. **Infrastructure:** • Jordan suffers from an underdeveloped network of infrastructures and a lack of institutions. This is evidenced by the small number of poorly equipped and managed cultural centers (public spaces, theaters, cinemas, press houses, training locations, and exhibition venues). See Annex IV. • Weak educational sector: Creativity is not taught at schools at a young age, making students disadvantaged when they enter universities. Universities are not well equipped, and graduates are relatively unprepared for a rapidly changing environment and rapid adoption of new technologies. • Weak manufacturing sector: Poor relative capabilities and adoption of technology and availability of capital for manufacturing. 3. **Legal/regulatory** • Poor policy: Jordan lacks the appropriate definition and business setup and IP protection for independent workers, freelancers, and creatives, making access to finance and appropriate license very difficult. • All creative industry sub-sectors cite government bureaucracy and barriers as the largest detriment to their growth. 4. **Market:**

	• Small domestic market and difficult access to the export market due to poor manufacturing standards and poor perception of Jordan and Jordanian products internationally. Manufacturing standards and compliance limit the possibility of export. • High cost of raw materials, customs and taxes, and poor manufacturing sector hold back the design / functional art sub-sector • Lack of competition and access to talent results in a poor product quality.
Opportunities	**Threats**
1. The expanding regional market (primarily KSA) offers an opportunity for exporting design and creative services and goods, as well as the opportunities presented by the regional market for reconstruction (architectural services). 2. The return of tourism to Jordan will in turn strengthen the creative sector in terms of Amman's festival season, concerts, events, exhibitions, crafts sales, design sales, creative services, etc. 3. The market for creative industry products and services is growing rapidly both locally and globally, with a growing demand for design services. The population growth in Jordan offers a great opportunity as demand for more housing, more products, more manufacturing will create more demand for creative products and designers. 4. The availability of funding and support for the tech industry will directly improve the creative industries.	1. The KSA market is attracting more foreign investments and funds away from Jordan. 2. The "brain drain" is seeing many creatives leave Jordan to seek better economic opportunities elsewhere and it is, therefore, difficult to retain talent. 3. Rapid technology changes and advancements are difficult to keep up with. 4. Market proliferation of cheaper alternatives to Jordanian products and services as well as better quality alternatives at competitive prices. 5. Some creative products / outputs may be easy to replicate.

5. Strategic Objectives

Strategic Objectives
1. **Policy and regulation:** To adopt an "open door" policy that encourages creative industries, recognizes it as a pillar of priority within the larger national strategy, and emphasizes it as an important component of Jordan's economy and development.
2. **Infrastructure and institutional development:** To establish a unified body (organization) that supports, represents, and coordinates Jordan's creative industries.
3. **Legal/regulatory:** To identify and reduce government bureaucracy and build agility.
4. **Market:** To drive international demand and recognition for Jordan's creative products and services by building a brand for Jordan.
5. **Education:** To reinstate creative education across all institutions and introduce new curricula and programs to ensure relevance and competitiveness in the face of a rapidly changing ecosystem.

6. Initiatives (projects)

INITIATIVE 1: Strategic Objective: All
Initiative Name: BUILDING AN INCENTIVE PACKAGE FOR CREATIVE INDUSTRIES
Short Description: - Build an "open door" policy or "free zone" benefits in the form of an incentive package intended to attract creative industries, projects, and businesses to execute their projects using Jordanian talent or in Jordan. - Reduce regulation and restrictions on creatives practicing in Jordan in the form of reduced licenses and registration requirements for freelance workers, business and legal support for freelancers - Can be coupled with the idea of a "creative hub" providing affordable workspaces and shared facilities where creatives can co-locate, network, seek support, and also create synergies, efficiencies, and sharing of opportunities. - Working with the public sector, banks, and investors to improve the flow of investment to business in the creative sector.
Expected Outcome: - Attracting increased investment and jobs - Increased awareness of the creatives and their outputs - An expanded marketplace - Facilitating job creation and growth - Increased synergies and efficiencies / reduced redundancies
Other related fields (if desired):

INITIATIVE 2: Strategic Objective: Mainly (2) Infrastructure, but also benefits towards (3), (4), and (5)
Initiative Name: BUILDING A STRONG REPRESENTATIONAL INSTITUTION

Short Description:
- Create a public-private partnership for the purpose of driving the aforementioned vision for supporting creative industries.
- The purpose of this representational institution will not be regulatory, but its functions include:
    - Advocacy: Aggregator and collector of opinion and providing a shared voice for lobbying and better policies and cross-sectoral interaction.
    - Assessment: Developing accurate statistics and evaluation methodologies and tools to monitor the growth of the creative industries and provide information on key points of improvement.
    - Marketing and business development: Organize, support, promote, and advocate for the design and creative industries in Jordan, and establish private sector trade linkages and partnerships both locally and abroad.
    - Incentives and capacity building:Increase competitiveness of the industry by offering a system of training programs, competitions, awards, and grants through which creative industry players will be encouraged to achieve quality.
    - Support: Providing a one-stop shop for information, tips, and tools on how to navigate government registrations, licensing, and regulations.
- The institution would work in partnership with the Ministry of Trade and Industry, Ministry of ICT, Ministry of Tourism, Ministry of Culture, and the Ministry of Education.
- It should be all encompassing of creative industries, while also composed of working groups based on the sub-sectors.

Expected Outcome: - The development of more effective policies and strategies to support the growth of the creative industry.
Other related fields (if desired):

INITIATIVE 3: Strategic Objective: (1) Policy and (4) Market
Initiative Name: BUILD AN AWARENESS CAMPAIGN AND BRAND FOR A CREATIVE JORDAN
Short Description: Build an awareness campaign to be launched locally and internationally for the purpose of: - Establishing a promotional brand for the sector. - Increasing the visibility of the creative industry in the media to improve the perception of creative industries as important industries and not simply leisure, luxury, or "artistic." - Creating awareness about the value of creative industries as pillars for innovative and competitive economies and cohesive societies. - Educating and informing both businesses and the public about the value of the sector and what to look for in commissioning and buying creative services. - Include Jordanian creative sector in mainstream international promotion activities and utilize Jordanian embassies abroad to promote Jordanian culture, creative festivals and events, as well as creative products and services. - Promotes the goods and services produced by the creative economy abroad to create more jobs and expand markets. - Promote an "open door" policy for filmmakers, creative events, media, and design to encourage foreign investment and international markets. - Promote Amman as a city of culture and embed cultural tourism as a main pillar in Jordan's tourism strategy. - Embrace values of creativity, innovation, entertainment, moderation, openness, and technological adoption as part of Jordan's national values. - Incentivize outbound participation in international expos, trade fairs, exhibitions, events, competitions, etc. and design international touring and showcasing opportunities. - Organizing or co-organizing trade markets and large scale events.
Expected Outcome: - Increased demand for Jordanian creative industry and products. - Multiplier effect on all other sectors.
Other related fields (if desired): Tourism

INITIATIVE 4: Strategic Objective: (5) Education
Initiative Name: **<u>CAPACITY BUILDING AND UPSKILLING</u>**
Short Description: - Reforming education at the elementary level with an eye on introducing design-thinking and encouraging creative thinking and art classes at an early age. - Improvement of university level curricula. - Introducing portfolio-based admission to universities. - Encouraging cross-university competition through merit-based subsidies. - Encouraging more research-based institutions that encourage critical thinking. - Introducing more real-world cases and hands-on learning. - Introducing new disciplines on cultural management and creative industries management. - Post-entry peer-to-peer skills development (mentoring, exchanges, training programs). - Establishing bursaries to support continuing professional development and research. - Channeling development investment into programs to upskill and support the sector. - Train manufacturers on adopting international standards and compliance.
Expected Outcome: - A more talented and prepared job market. - Improved products and services that are higher in demand.
Other related fields (if desired): Education

INITIATIVE 5: Strategic Objective: (1) Policy and (4) Market
Initiative Name: BUILDING CULTURAL CAPITAL BY DEVELOPING CULTURAL INFRASTRUCTURE AND MANAGEMENT CAPACITIES
Short Description: - Build an infrastructure to allow creative products and services to be practiced, showcased, and developed - Reform public infrastructure and venues to attract and accommodate big events, conferences, exhibitions, trade shows, and music festivals - Build cultural capacities to better manage existing facilities (Royal Cultural Center, Al Hussein Cultural Center, Ras El Ain Gallery and Hangar, King Hussein Park, King Abdullah Park (abandoned), public parks). - Build incentives that reinvigorate private theatres and create partnerships and linkages with the film industry on mutual benefit and exposure. - Revitalize the management structure and build capacities in creative management, exhibition curation, event management, and facilities management.
Expected Outcome: - A more robust and relevant infrastructure to attract events and create a value-added multiplier effect on other industries in terms of job creation and potential - A more cohesive image of Jordan / Amman as a cultural capital - Benefits on standard of living, health and wellness, reduced extremism, social cohesion
Other related fields (if desired): Tourism, consumer spending, spillover on other creative industries including creative services, production-based design, service-based design,

7. General Recommendations

In order to get to the level of maturity where one can see change in the creative industries, several large-scale infrastructure work and institution-building efforts have to be implemented. These changes include policy reforms, investment in a unified representative body, education reform from the elementary to university level, significant investment in manufacturing industry, and a public campaign to produce a cultural shift and better understanding of design.

The following recommendations attempt to create priorities in tackling the large effort required:

1. The first and most important step is recognition of the value on an economic, social, and development level, as well as an important tool for cultural influence in the region. Recognizing the ripe and untapped opportunity afforded to Jordan early on will allow us to leverage the expanding demand for creative products and services worldwide, and carve a space for Jordanian products in terms of global market share.
2. Worldwide trends that are to be considered include increased "screen time", increased use of new media and reliance on media platforms to conduct business and share information, increased digitization and reliance on computer technologies, improved standards of living, changing workplaces and developments in intellectual property.
3. Embed creative industries as a crucial component of national strategy, and one that builds a creative infrastructure across all sectors.
4. Focus on your strengths: The film industry already has a reputation and is under threat given the expansion of the KSA market. Build an incentives package for filmmaking, script writing, film production, and TV series and work across the value chain to revitalize and incorporate local theatres, film festivals, and communication and marketing strategies to strengthen Jordan's efforts in advertising films made by Jordanians or films made in Jordan. Leverage existing partners, embassies, public and private TV channels and radio channels to promote these films as national products.
5. Begin with industries that have a higher multiplier effect: Film, events, and media are large and robust industries with the ability to pave the way for job creation in production-based and service-based design, cultural production, and art-making.
6. Leverage existing capital available for technology industries to build capacities in creative industries as well: media-based creative products, service-based design (digital design, graphic design, software, gaming, etc.), and production technologies.
7. One of the weaknesses of the creative industries is that nobody knows where to find talent or that it exists. Building infrastructure, institutions, and venues for creatives to gather, work together, build efficiencies and synergies, co-develop their products, and showcase them is key to raising the voice of creatives and improving perception on what they are capable of producing.
8. The local market is not enough, and the potential lies in the regional market and international market. Furthermore, local capital is not enough and incentives must be put in place to allow for fluidity in accessing available international capital. Therefore, efforts must be made to

increase connections and partnerships on a large scale between Jordanian creatives and abroad.

9. Since the creative industries does not have its own representation or Ministry, a body must be created to push the above forward, with the institution having strong links and partnerships across other institutions including the Ministry of Trade and Industry, Ministry of ICT, Ministry of Tourism, Ministry of Culture, and the Ministry of Education. This (these) institution(s) must be built to monitor and evaluate the sector, aggregate voice, pave new access channels to markets, facilitate procedures and access to funding, and build new partnerships are essential, alongside support to freelancers and small-business owners working within it.
10. Cultural perceptions and expectations remain a barrier to be addressed, along with the slow-moving investments in city infrastructure, cultural spaces, and industry. Social compliance and security have often been prioritized in Jordan and have undercut the economic benefit provided by leisure, entertainment, and cultural programming.
11. Longer term reforms to the education sector renovated curricula are necessary across age-groups. However, short-term upskilling, reskilling, and capacity building is essential to prepare the job market to improve the creative product and its management. Focus should not only be on business skills, but on capacity building and training in compliance with international standards of health, safety, and quality.

8. Annexs

Annex 1

Definition of creative industry sub-sectors

The creative industries are comprised of the following industries:

Category I: Media- based creative products

1. **Film**

Producers, directors, actors, art directors, camera operators, casting directors, choreographers, composers, costume or stage designers, floor managers, hairdressers, line managers, music directors, presenters, production engineers, software developers, special effects, videographers, writers, etc.

2. **Traditional and new media / content-creation**

TV, radio, video, audio-visual, live streaming media, video games, animation, photography, media agencies, social media specialists, photography, media consultants, advertising agencies, podcasting.

3. **Category II: Production-based creative products**

4. **Production-based design / functional arts**

Product design and innovation, furniture, fashion, jewelry, textiles, book-publishing, print-making.

5. **Art-making**

Fine arts, sculpture, ceramics, decorative arts, crafts, galleries, antiques.

Category III: Service-based creative products

1. **Service-based design**

Computer programming, creative technology, software engineering, graphic design, branding, visual communications, UI/UX design, game design, app designers, web design, publishing, print-making, landscape design, interior design, architecture and urban planning.

2. **Creative services and events**

Food businesses and design, catering, culinary arts, restaurants, events, festivals, concerts, biennials, exhibitions, creative spaces, makerspaces, co-working spaces, creative impact funds, creative service providers, event planners, curators, gallerists, consultants, marketing agencies and management and all associated support including event security, ushers, logistics, PR, communications, marketing.

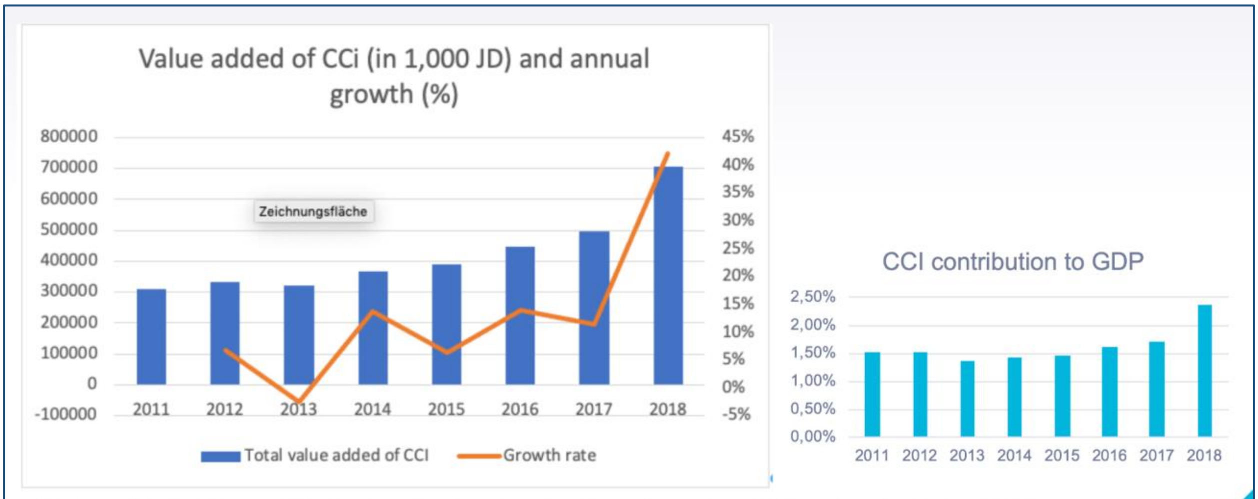
3. Performing-arts and cultural practices

Theater, dance, music, performing arts, writers, poets, cultural practices and heritage.

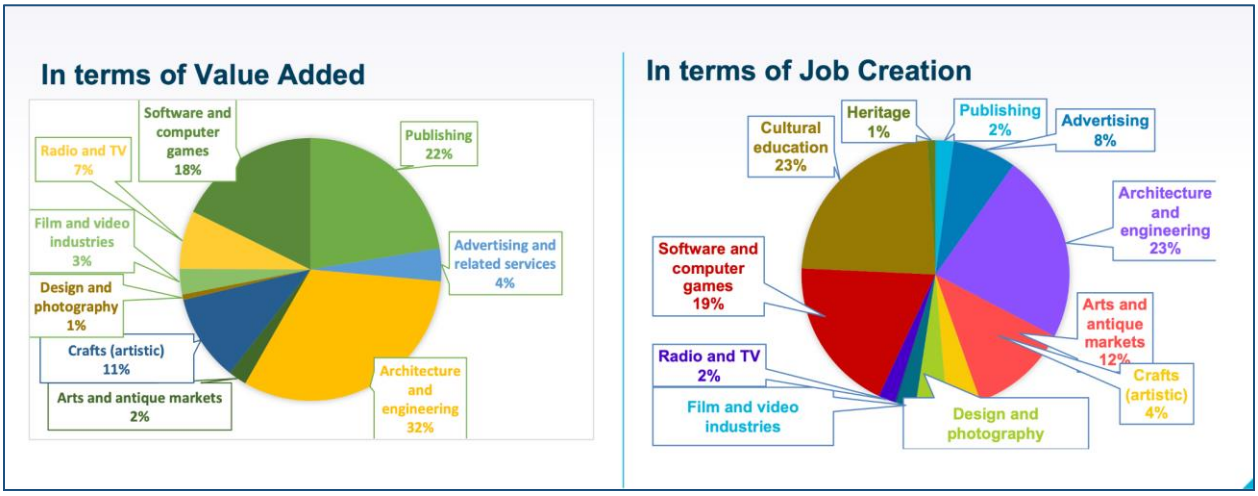
Annex 2

GDP projections

Extracted from a CREACT4MED report, 2020. Author unknown.

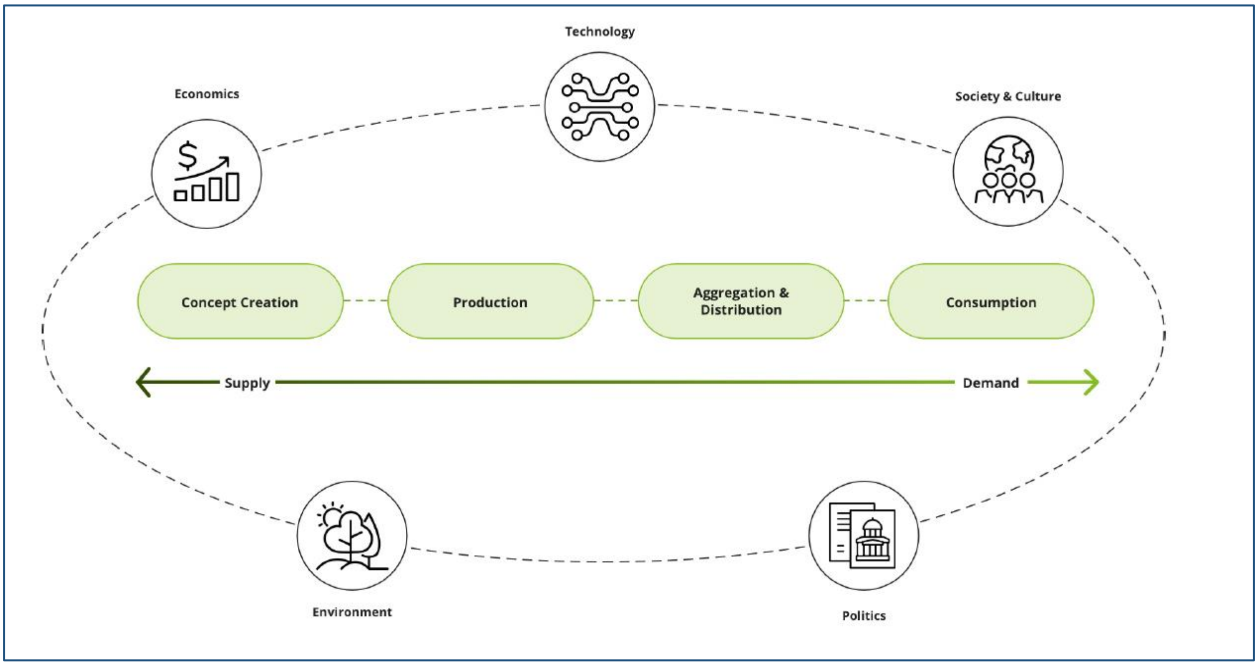


Value added of the CCI in Jordan (Authors' estimations based on ISIC-4 data by DoS, 2020)



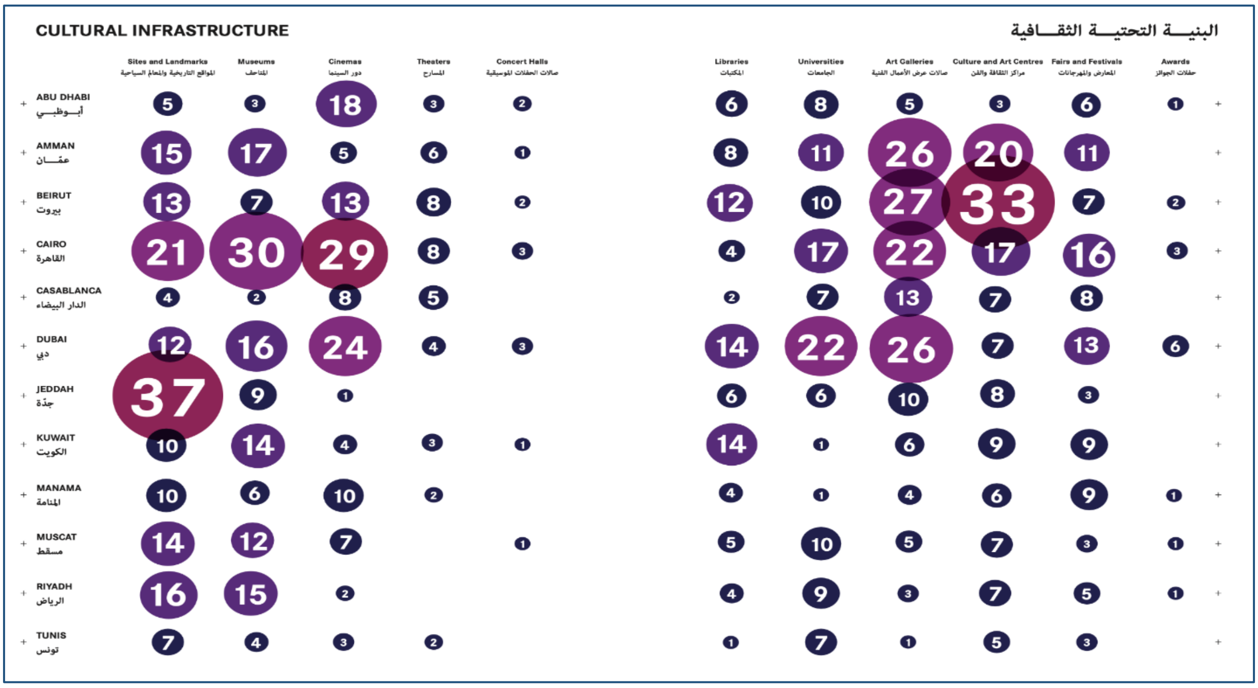
Annex 3

Creative industries value chain[8]



Annex 4

Regional comparison of cultural infrastructure / assets



Source: Cultural Vibrancy in Arab Cities, by Nuqat, 2019

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[8] The Future of the Creative Economy, 2021. Deloitte.

INNOVATION CLUSTERS تجمعـــات الابتكـــار

	Urban Districts القطاعات الحضرية	Co-working Spaces مساحات العمل الجماعي	Incubators and Accelators الحاضنات والمسرعات	Digital Platforms المنصات الرقمية
ABU DHABI أبوظبي	3	5	4	1
AMMAN عمّان	1	3	5	4
BEIRUT بيروت	1	6	6	1
CAIRO القاهرة	2	11	13	3
CASABLANCA الدار البيضاء	1	6	6	
DUBAI دبي	7	10	6	
JEDDAH جدّة		7	2	
KUWAIT الكويت		8	5	
MANAMA المنامة	1	10	11	
MUSCAT مسقط	2	1	6	
RIYADH الرياض		9	4	2
TUNIS تونس		11	5	

Cultural Infrastructure البنية التحتية الثقافية

15	Sites and Landmarks المواقع التاريخية والمعالم السياحية
17	Museums المتاحف
5	Cinemas دور السينما
6	Theaters المسارح
1	Concert Halls صالات الحفلات الموسيقية
8	Libraries المكتبات
11	Universities الجامعات
26	Art Galleries صالات عرض الأعمال الفنية
20	Culture and Art Centres مراكز الثقافة والفن
11	Fairs and Festivals المعارض والمهرجانات
0	Awards حفلات الجوائز

Innovation Clusters تجمعات الابتكار

1	Urban Districts القطاعات الحضرية
3	Co-working Spaces مساحات العمل الجماعي
5	Incubators and Accelerators الحاضنات والمسرعات
4	Digital Platforms المنصات الرقمية

Source: Cultural Vibrancy in Arab Cities, by Nuqat, 2019

منتدى الاستراتيجيات الأردني

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