CREATIVE AND CULTURAL INDUSTRIES IN SRI LANKA

Draft Final Report

Institute of Policy Studies of Sri Lanka

2020 March

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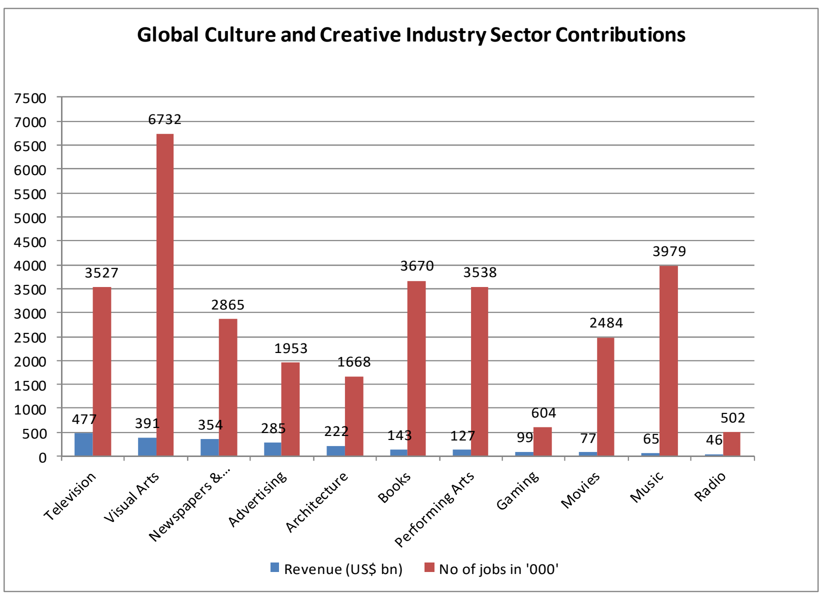
Abbreviations and Acronyms

AOD – Academy of Design
DCMS-Department for Culture, Media and Sport
DIKN - *Dasar Industri Kreatif Negara* (National Creative Industry Policy of the Malaysian Government)
FGDs - Focus Group Discussions
GDP - Gross Domestic Product
INR – Indian Rupee
IPRs - Intellectual Property Rights
KIIs - Key Informant Interviews
LFS - Labour Force Survey
NEDA - National Enterprise Development Authority
NVQ - National Vocational Qualifications
OSCA- Outstanding Song Creators Association
SAB - State Advisory Board
SC - Steering Committee
SLBPA- The Sri Lanka Book Publishers Association
SLSA- Sri Lanka Singers Association
TVET -Technical and Vocational Education
UNCTAD - United Nations Conference on Trade and Development
UNDP - United Nations Development Programme
UNESCO - United Nations Educational, Scientific and Cultural Organisation
UOK -University of Kelaniya
UOM - University of Mroatuwa
USD- United States Dollar
VFX - Visual Effects Industry

1. Introduction

It is said that oil was the primary fuel of the 20th century economy, while creativity is the fuel of the 21st century[1]. The creative economy is recognised as an important sector and a significant contributor to national Gross Domestic Product (GDP) in most countries, since its first introduction in 2001 in John Howkins' book on 'The Creative Economy: How People Earn Money from Ideas". In this book, Howkin explains that there is a relationship between, "creativity" and economics. Creative industries are the driving force in the creative economy. Creative industries have shown an exceptional growth in turnovers and job creation over the past years. According to a study conducted by Ernst & Young and jointly presented by the United Nations Educational, Scientific and Cultural Organisation (UNESCO) and the International Confederation of Authors and Composers Societies (CISAC), in 2015 the creative industry sector generated US$ 2,250 billion in revenues which amounts to 3% of the world's GDP[2]. As shown in Figure 1, 11 categories in the creative industry have created US$ 2,286 billion revenue and 31million jobs around the world in 2015.

Figure 1: Global Creative Industry Sector Contributions in 2015



Source: World Economic Forum. (2015, December 27). *What is Creativity Worth to the World Economy?* Retrieved November 30, 2019 from https://www.weforum.org/agenda/2015/12/creative-industries-worth-world-economy/

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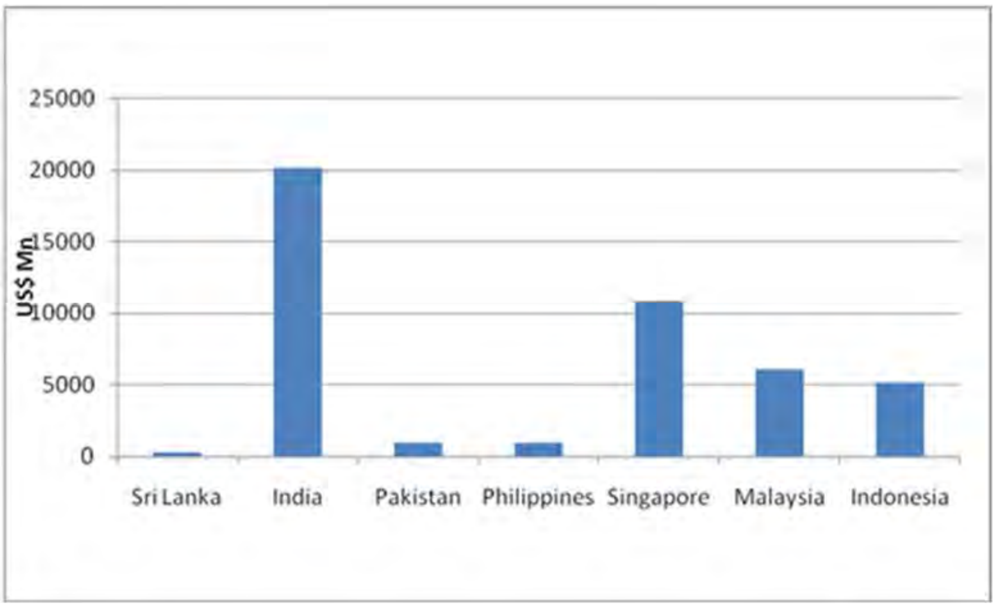
1 British Council. (n.d.). *What is the Creative Economy?* Retrieved November 30, 2019 from https://creativeeconomy.britishcouncil.org/guide/what-creative-economy/

2 World Economic Forum. (2015, December 27). *What is Creativity Worth to the World Economy?* Retrieved November 30, 2019 from https://www.weforum.org/agenda/2015/12/creative-industries-worth-world-economy/

Moreover, creative industries play a major role in world trade. World exports of creative goods increased from US$ 208 billion in 2002 to US$ 509 billion in 2015. According to a Report released by the United Nations Conference on Trade and Development (UNCTAD) in 2019, Developing countries are also actively engaged in creative good exports, including China, Hong Kong, India, Singapore, Thailand, Malaysia, Taiwan, and Turkey. The main products in world export of creative goods are design, visual arts, art crafts, new media and publishing. Figure 2 shows creative export volumes in some selected Asian countries. In South Asia, India leads creative goods exports.

Figure 2 : Creative Goods Exports in Some Selected Countries, 2015



Source: United Nations Conference on Trade and Development. (2019). *Creative Economy Outlook 2002-2015*, Geneva, Switzerland: United Nations Conference on Trade and Development.

Exports of creative industry services account for nearly 19% of the total service exports in developed countries. According to the UNCTAD 2019 report, in UK, IT, software and computer services accounted for nearly US$ 13 billion, while film, TV, video, radio and photography were valued at US$ 7 billion, in 2015. In USA, the film industry earned US$ 10.3 billion in revenue in 2015. The report highlights that, in China 22 new screens are unveiled each day. In India, the animation and Visual Effects Industry (VFX) grew at 16.4% in 2016 to reach a size of US$ 8.2 billion (INR 59.5 billion), driven majorly by a 31% growth in VFX, with animation remaining steady at a growth rate of 9%.

These figures show that creative industries are an imperative part of the economies in developing countries as well. Especially, its resilience to economic crises and its ability to earn income from individual creativity attract investments in both the private and government sectors. Creativity, more than labour and capital, or even traditional technologies, is deeply implanted in every country's cultural context. With effective nurturing, these sources of creativity can open up new opportunities for developing countries to increase their shares of world trade and to "leap-frog" into new areas of wealth creation, (UNCTAD, 2004)[3]. Table 1 explains as to how the creative industry sector has contributed to growth in a few selected Asian developing countries.

Table 1 : Contribution from the Creative Industry Sector to Country Growth

Indonesia	Philippines
Indonesia's creative industries show strong growth which started from 2010, consistently recording positive growth to the country's GDP, which started from 528 trillion IDR in 2010, increasing to 784 trillion IDR in 2014, and a further 922 trillion IDR in 2016. This has proved that the creative economy has a huge potential for growth. The growth of creative industries sector is in the same line with the growth of Indonesia's e-commerce industry, which has grown by about 60–80% every year and is expected to be a major contributor to economic growth in Indonesia. (*1 IDR = US$ 0.000071)	In 2009, creative industries were bringing in $7.5 billion, about 5% of the GDP, and employing 4 million people. By 2017, those numbers had jumped to US$ 12.5 billion, or 7.34% of the GDP, and almost 6 million workers. (Santos, 2018) In terms of exports, in 2014, the design industry accounted for the largest share, with fashion goods at US$ 279 million, interior design at US$221 million and toys and jewellery combined at US$ 116 million (Rosales, 2019).
Malaysia	**Singapore**
Figures from the government-backed MyCreative Venture seems to point to a growing creative industry in Malaysia. It reported that there are some 11,000 professionals currently involved in Malaysia's creative content and technology industry. Most of these professionals are involved in key creative segments, such as animation, games, visual effects and new media, multimedia assets for apps, and content-enabled delivery platforms. Companies in this space had an export value of RM1.2 billion in 2016 alone, making it the fastest growing technology marketplace in the last three years, according to MyCreative. The size of the Malaysian creative industry can be approximately measured at a contribution of 1.6% to the GDP of Malaysia – as per 2014 statistics.	In Singapore, the design sector contributed $2.13 billion (US$ 1.6 billion) to the nation's GDP in 2013 and employed 30,000 people. The number of people working in the advertising industry is estimated to be close to 10,000, and this group has won about 65% of regional advertising accounts in the Asia-Pacific region in the last three years, according to R3, a consultancy covering the marketing services sector. In the first quantified study of the economic and social contribution of cultural and creative industries around the world by UNESCO and E & Y in 2015, Singapore was ranked as the fifth best city for attracting global creative talent, ahead of cities like Tokyo and Berlin. Singapore is also a UNESCO "**Creative City of Design**" and the ninth most creative country in the world according to Martin Prosperity Institute's Global Creativity Index.

Source: United Nations Conference on Trade and Development. (2019). *Creative Economy Outlook 2002-2015*, Geneva, Switzerland: United Nations Conference on Trade and Development.

3 United Nations Conference on Trade and Development. (2004). *Creative Industries and Development (UNCTAD XI) (TD(XI)/BP/13)* [online]. São Paulo: UNCTAD 11th session, 13–18 June 2004. Retrieved November 30, 2019 from http://www.unctad.org/en/ docs/tdxibpd13_en.pdf

According to the Global Creativity Index (GCI)[4] in 2015, Australia, the United States and New Zealand were ranked as the first three countries out of 139 countries in the world. This index was prepared using 3 Ts, namely; Technology (research and development investment, and patents per capita), Talent (share of adults with higher education and workforce in the creative class), and Tolerance (treatment of immigrants, racial and ethnic minorities, gays and lesbians). In Asia, Singapore is ranked as number one followed by Japan and Korea. Sri Lanka is in the 106th globally and the 4th in South Asia. Nepal, Bangladesh and India are leading in the South Asian region.

These indices and rankings suggest that Sri Lanka is fairly far behind in terms of creativity relative to its peers. However, it is important to note that recently there is a significant growth in several sectors such as advertising, design, publishing, digital creatives, web and app development, crafts, games developing, music, performance and art, photography etc.[5] Nevertheless, as a whole, Sri Lanka's creative industry is still in a grey area, as mapping and harnessing their potential is a challenge.

One of the most important features of the creative industries in Sri Lanka is having a higher number of microenterprises and self-employed professionals. This may be because starting a new business in the field of creative industries is relatively simple. But since the creative economy tends to comprise of a fair number of small businesses, it is hard to identify the distribution and the scope very clearly[6].

Since creative industries are one of the most important contributors to any economy, measuring their contribution to economic activities is important. It helps both policymakers and industry professionals to communicate key concepts, share reliable data and make the case for greater investments in the creative sector. Subsequently, the "mapping" method has been developed to help countries or regions start examining and documenting the value of the creative industries. Mapping[7] gives an overview of the industries, particularly in places where information is lacking. This is designed to be a first step in identifying the creative industries' location and size, or addressing specific needs and challenges in the sector. Accordingly, this report on Sri Lanka's creative industry sector is a starting point in attempting to map the sector. The main objectives of this study are to;

- Establish a picture of the current size and scale of the creative industries sector in Sri Lanka.

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4 Martin Prosperity Institute. (2015). *Global Creative Index*.. Retrieved November 30, 2019 from: *martinprosperity.org › content › the-global-creativity-index-2015*

5 *Ibid.*

6 Sunday Observer. (2018, August 14). *AMDT, The 'Fuel' for Sri Lanka's Creative Industries.* Retrieved November 30, 2019 from http://www.observereducation.lk/2018/08/14/amdt-the-fuel-for-sri-lankas-creative-industries/

7 Business Clusters in the UK. (2001).– *A First Assessment.*

- Provide information to inform the design of interventions to support sector recognition, growth and development.
- Provide information to relevant government, sector and support agencies to enable the development of policies and strategies that can promote sector development.

The outline of the remainder of the report is as follows. Chapter 2 discusses conceptual frameworks of creative industries adopted in different countries and regions and identifies the creative industry and subsectors in Sri Lanka. Chapter 3 deals with the methodological approach of the study and describes the research tools that are used in carrying out the study. Chapter 4 discusses findings of the study in three stages, namely; findings from secondary data analysis, field survey data analysis and in-depth description of each subsector based on primary interviews. Conclusions and policy recommendations are discussed in chapter 5.

2. Conceptual Framework

Given the broad scope of the creative and cultural industries, the way in which the creative industry is defined and classified varies widely across different countries and regions. A number of different models have been developed to provide a systematic understanding of structural and other characteristics of these industries. While the terms 'creative and cultural industries' can vary from one country or regional context to the other, even within local contexts, the terms continuously evolve as new dialogs develop, and technology introduces and redefines ways in which things are done.

2.1 Country Definitions and Classifications

The United Kingdom (UK) is a forerunner in attempts to define the creative industries, with the term originating in the mid-to-late 1990s. It was first taken up at a national level by the UK government in 1998 with the creation of the then Department for Culture, Media and Sport (DCMS), now termed as the Department for Culture, Olympics, Media and Sport (DCOMS). The DCMS defines creative industries as "those activities which have their origin in individual creativity, skill and talent, and which have a potential for wealth and job creation through the generation and exploitation of intellectual property".[8] In the initial 1998 mapping document, the following were identified as creative industries:

8 Flew, T., & Cunningham, S. (2010). Creative Industries After the First Decade of Debate. *The Information Society,* 26(*2*). British Council. (2016). Mapping the creative industries toolkit, p. 16. London, United Kingdom: The British Council.

Table 2 : Creative Subsectors in the UK, DCMS Definition

Subsector	Components
Advertising	Marketing and some public relations activities
Architecture	Big and small architecture firms
Art and Antiques Market	Dealers and auctioneers of antique jewellery, paintings, sculpture, furniture, maps, drawings and prints
Crafts	Textiles, ceramics, wood, metal, glass, graphic and leather crafts
Design	Design consultancies and designers
Designer fashion	Fashion designers and businesses
Film and video	Film production, distribution and exhibition
Interactive leisure software	Computer and video games, educational and reference material
Music	Live and recorded music, music publishing and the administration of music copyright
Performing arts	Theatre, dance, ballet, musicals and opera performances
Publishing	Publishing of books, newspapers, magazines and electronic information
Software and computer services	Creation, production and supply of tools and applications and of software products, including web design
Television and radio	All public service, commercial, cable and satellite tv and radio, including the production and broadcasting of programmes

Source: British Council. (2010). *Mapping the Creative Industries: A toolkit*. London, United Kingdom: The British Council.

While some minor alterations have been made to the list in response to criticisms, the 1998 definition is still in essence the one used by the DCMS today. It has also been used by many other countries as the basis for developing their own definitions.

Many countries in **Asia** have also used the UK's DCMS definition of creative industries to develop their own, by adjusting it to fit local contexts and needs. **Singapore** has an established Creative Industries Working Group (CIWG), which has directly adopted the UK's definition of creative industries, and groups them under three broad headings: arts and culture, design, and media, as shown in Table 3 below.

Table 3: Singapore's Classification Framework for the Creative Industries

Arts and culture	Design	Media
Photography Visual Arts Performing Arts Arts and Antiques Trade, Crafts	Software Advertising Architecture Interior Design Graphic Design Industrial Design Fashion	Publishing TV and Radio Digital Media Film and Video

Source: Wu, J. (2003). *Information Note: Development of Creative Industries in Singapore*. Legislative Council Secretariat.

Since the early 2000s, the country has prioritised the development of a "creative society" and cultivated the arts, various high-tech and research enterprises, and created an environment conducive to fostering creative and cultural exchanges, attracting creative industry investment, promoting cultural tourism, and establishing creative districts. A key strategy is nation-branding, with its most recent national slogan being "Singapore: Global City for the Arts".[9] Annex 1 provides an in-depth analysis of creative industry classifications.

2.2 Creative Industry Subsectors in Sri Lanka

The scope of Sri Lankan creative industry subsectors considered for this study is based on a review of the different country definitions and classifications presented above, as well as on consultation of a wide range of stakeholders engaged in different creative subsectors via a brainstorming session conducted among the Steering Committee (SC) for the project, which consists of experts in the field. Based on regional context and associated similarities, the classification of Singapore was chosen as a basic foundation, which was subsequently amended to reflect other important subsectors. Modifications proposed to the Singaporean framework include:

- The inclusion of Ayurveda and lifestyle products as a subsector, as in the case of India
- Consideration of beauty culture as a new subsector, given that is it a large and growing industry in Sri Lanka, employing a large number of the youth population
- The inclusion of branding into the advertising subsector
- The addition of event management as a crosscutting area

Thus, the study began with 20 subsectors, including event management, Ayurveda, beauty culture, and culinary arts. However, it was later decided that these subsectors will be omitted from this study because although creativity plays a role in each of these, it is not the central tenet of these subsectors and therefore they were not taken as core subsectors in the Creative Industries. Summary findings from these sectors are in Annex 2.

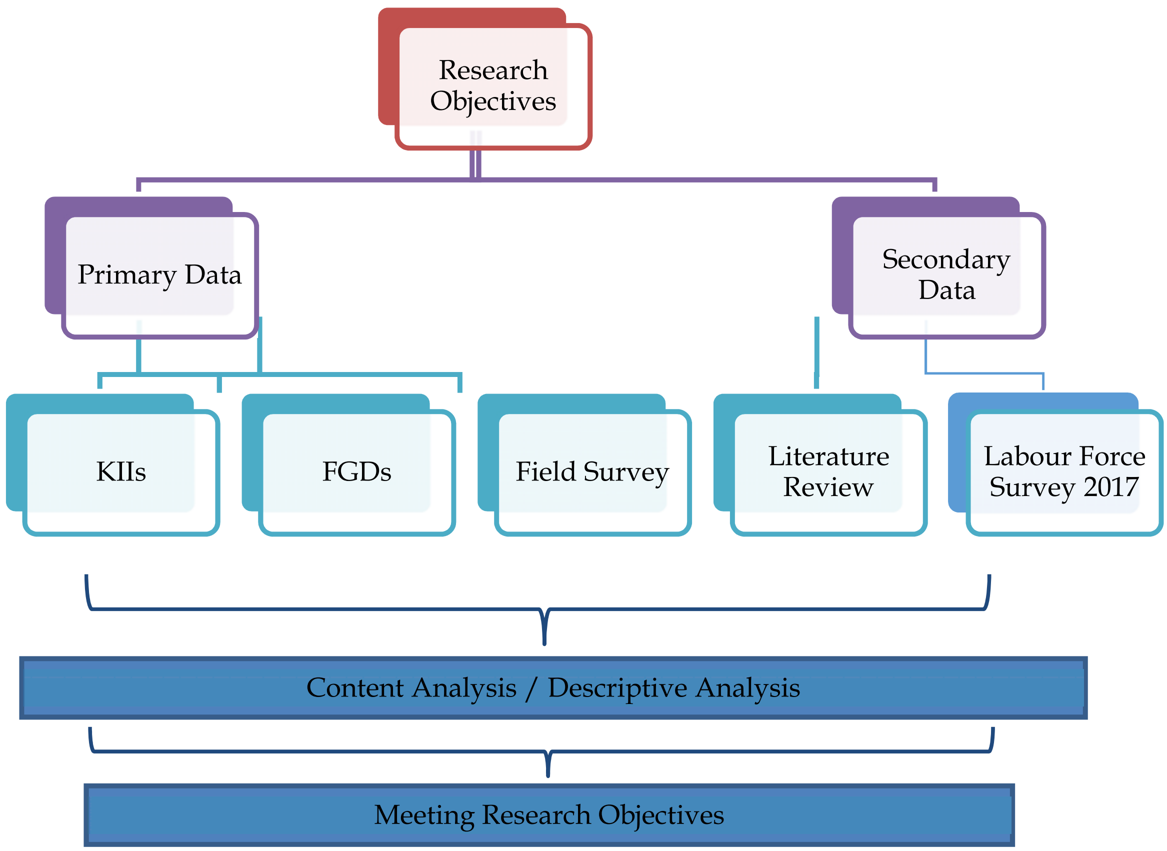
Finally, 16 subsectors were subsequently identified as constituting Sri Lanka's creative industry mainly following and developing the Singaporean model. However, the organisation of information presented in the report follows a slightly different form which is a result of limitations on the ability to disaggregate national level data and constraints on focus group participation. As such, the sub sectoral analyses are of the following eight groupings: Literature & Publishing, Advertising, Performing and Visual Arts, Photography, Crafts, Fashion Design, IT (Graphic Design, Gaming & Digital Creatives), and Architecture & Interior Design. Chapter 4 provides detailed descriptions of each subsector.

9 United Nations Development Programme. (2013). *Creative Economy Report* 2013: *Widening Local Development Pathways*. Paris, France: United Nations Development Programme.

3. Methodology

A participatory and consultative approach comprising of desk research, consultation, and field research was adopted throughout the study. Thus, research methodology consisted of both quantitative and qualitative research tools, considering the nature of the research objectives.

Figure 3 : Overview of Methodical Approach



Source: Compiled by authors.

As shown in Figure 3, primary data was collected in three stages to meet the objectives. Key Informant Interviews (KIIs), Focus Group Discussions (FGDs) and a Field Survey were conducted to gather primary data. A thorough literature survey and data from the 2017 Labour Force Survey (LFS) were used as secondary data sources. Content analysis and descriptive analysis methods were mainly used to analyse collected data.

3.1 Data Collection

3.1.1 Literature Survey

The literature survey was based on various types of documents – both published and unpublished materials. Documentation included scientific reports, books, publications, journal articles, working papers, research reports web-based publications etc. This exercise was carried out before the commencement of fieldwork and it supported the purpose of triangulation of data from other sources (FGDs and KIIs).

3.1.2 Focus Group Discussions (FGDs)

Nine focus group discussions were conducted based on prepared FGD guidelines (Annex 3) and with the participation of nearly 75 respondents (Annex 6: Participants of FGDs). Locations were selected according to a district-wise analysis which indicated where the largest number of people were engaged in each subsector. This happened to be Colombo for most subsectors, whereas for crafts Kurunegala were identified.

As shown in Table 4, FGD participants were selected using different sources. The FGDs primarily focused on obtaining information on the profile and size of each subsector, governance and regulations, creative industry policies, and constraints and development priorities in the upcoming years. Most FGDs were attended by around 10-12 sector specialists.

Table 4: Focus Group Discussions

Subsectors	Selection	Location
Photography and Film	• Rainbow pages – National on-line directory • National Film Corporation-cinematographers • National Film Corporation-Camera Assistants • Department of Cultural affairs-List of Photographers • Suggestions provided by the KIIs • Nominations from the British Council	Conference Room, IPS
Performing and Visual arts	• Department of Cultural affairs • Town hall Theatre Directory • List from National Film Corporation • Nominations from the British Council	Conference Room, IPS

	• Suggestions provided by the KIIs	
IT (Graphic design, Gaming, Digital media)	• Rainbow pages – National on-line directory • Suggestions provided by the KIIs • Nominations from the British Council • “Behance” web-site	Conference Room, IPS
Publishing and Literature	• Department of Cultural Affairs • Town hall Theatre Directory	Conference Room, IPS
Advertising & Branding	• 4A's list • Rainbow pages – National on-line directory	Conference Room, IPS
Architecture & interior design	• Directory of Sri Lanka Architects • Rainbow pages – National on-line directory	Conference Room, IPS
Fashion design	• Rainbow pages – National on-line directory • University of Moratuwa • Academy of Design • Nominations from the British Council	Conference Room, IPS
Craft	• National Enterprise Development Authority (NEDA) • National Design Center (NDC)	Viskam Niwasa Kurunegala

3.1.3 Key Informant Interviews (KIIs)

Nearly 40 KIIs were conducted with key experts in the sector to represent each subsector (Annex 7: KII Participants), based on a semi- structured KII guide (Annex 4: KII Guide). These mainly focused on obtaining views of different definitions of the creative industry, details on stakeholders and sector-specific associations, government policies and regulations, and constraints and opportunities for further growth and development.

3.1.4 Labour Force Survey Data

Secondary data for the study was obtained from the 2017 LFS conducted by the Department of Census and Statistics of Sri Lanka. The LFS is a quarterly survey, which collects information on labour market and demographic characteristics and trends in education, employment, unemployment, and labour force participation rates. The 2017 LFS covers a sample size of 25,750 housing units and 83,783 individuals from all 25 districts in the country. The survey uses the Sri Lanka Standard Classification of Occupation - 2008 (SLSCO – 08) to classify occupations, derived from the International Standard Classification of Occupation – 2008 (ISCO – 08). This classification was used to identify occupations that are part of the creative industries, in line with the creative subsectors identified for this study. The coverage is limited to occupations within these subsectors that reflect some form of 'creative' endeavour.[10] The creative occupations identified for each creative subsector are given in Table 5 below.

Table 5: Creative Subsectors and Occupations

Subsector	Occupations
1. Advertising, marketing and branding (advertising)	• Manager, Publication • Manager, Media Services • Proprietor, Advertising Industry • Brand Manager • Advertising and Marketing Professionals
2. Architecture	• Architect, Building • Architect, Landscape • Product and Garment Designers • Town and Traffic Planners • Cartographers and Surveyors
3. Crafts	• Precision-instrument Makers & Repairers • Musical Instrument Makers and Tuners • Jewellery and Precious-metal Workers • Potters and Related Workers • Glass Makers, Cutters, Grinders and Finishers • Sign Writers, Decorative Painters, Engravers and Etchers • Handicraft Workers in Wood, Cane and Related Materials • Handicraft Workers in Textile, Leather and Related • Coir Industry Workers • Other Handicraft Workers • Craft and Related Workers
4. Product, graphic and fashion design (design)	• Graphic and Multimedia Designers • Interior Designers and Decorators
5. Film, TV, video, radio and photography (Film and photography)	• Film, Stage and Related Directors and Producers • Announcers on Radio, Television and Other Media Photographers
6. IT, software and computer services (IT)	• Manager, Information Technology • Manager, Printing Press • Manager, Publications • Information and Communications Technology Service Managers • Information Technology Trainers • Information and Communications Technology (ICT) Sales Professionals • Systems Analysts • Software Developers • Web and Multimedia Developers • Web Technicians
7. Publishing and literature (publishing)	• Authors and Related Writers • Journalists • Translators, Interpreters and Other Linguists

10 For instance, within the advertising, marketing and branding subsector, occupations such as "managers of public relations and information" which do not necessarily involve a creative element are not taken into account.

8. Music, performing and visual arts (arts)	• Visual Artists • Musicians, Singers and Composers • Dancers and choreographers • Actors • Creative and performing artists • Other Artistic and Cultural Associate Professionals

Source: Author compilations.

3.1.5 Field Survey

A field survey was conducted in selected seven provinces based on a field survey questionnaire (Annex 9: Field Survey Questionnaire)

Sample Selection

The district wise distribution of the identified creative occupations in each creative subsector was used to select the sample for the national survey. First, the total number of employees for each subsector was calculated and weighted by the targeted survey sample size of 492 to determine numbers that should be sampled for each subsector (Table 6). Next, these totals for each subsector were again weighted according to the district wise distribution, to generate numbers by both subsector and district.[11] The three districts recording the largest numbers for each subsector were subsequently chosen as locations to conduct the national survey .

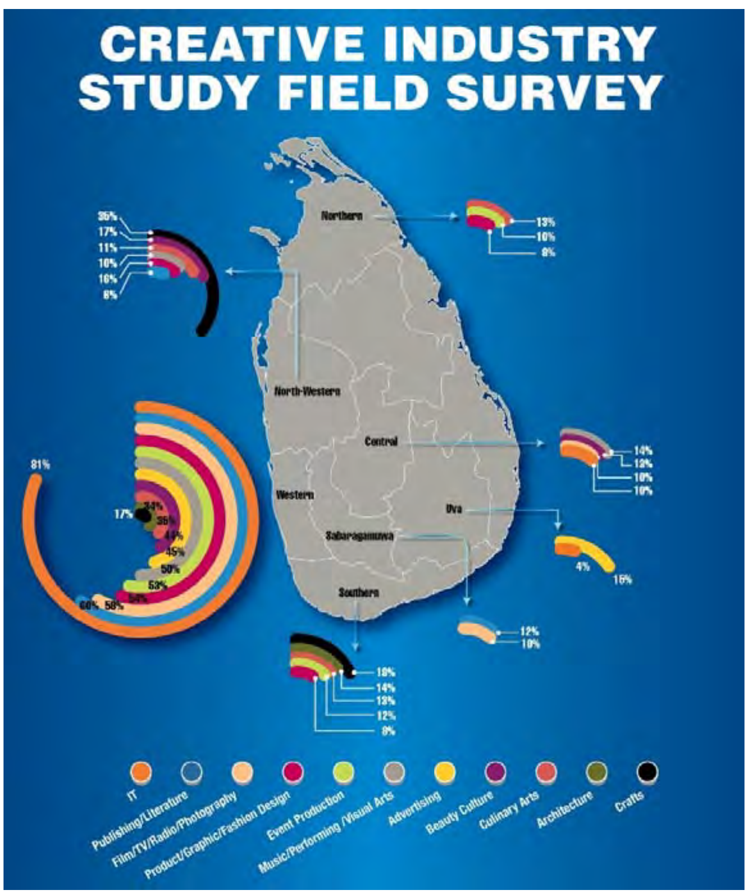
Table 6: Number of Total Creative Employees by District and Subsector, 2017

District	IT	Advertising	Publishing	Architecture	Design	Crafts	Arts	Film
Colombo	12,947	2,787	8,678	1,778	2,890	6,596	3,339	2,211
Gampaha	3,719	582	2,551	1,387	1,516	14,107	2,552	2,403
Kalutara	2,039	0	925	979	0	4,481	1,174	287
Kandy	1,597	212	753	0	633	5,522	1,821	476
Matale	461	0	389	0	0	2,179	182	404
Nuwara Eliya	239	323	0	654	0	202	0	0
Galle	0	0	855	207	0	8,369	666	240
Matara	0	0	195	469	229	6,852	0	0
Hambantota	0	518	0	0	427	10,854	210	257
Jaffna	247	357	932	0	0	2,192	895	183
Mannar	0	64	0	132	0	400	0	98
Vavuniya	342	304	0	1,021	0	263	0	111
Mullativu	79	0	79	0	0	292	0	0
Kilinochchi	0	0	0	82	457	267	0	75

Batticaloa	0	0	0	0	291	4,238	242	0
Ampara	0	191	0	557	0	3,425	207	0
Trincomalee	0	269	229	0	182	2,589	0	0
Kurunegala	310	545	1,072	0	538	36,222	1,580	346
Puttlam	208	0	208	272	268	16,081	0	0
Anuradhapura	0	0	0	0	282	6,591	0	610
Polonnaruwa	0	0	781	0	0	2,927	0	0
Badulla	900	1,085	0	435	0	1,575	411	0
Monaragala	0	0	0	287	0	2,402	0	0
Ratnapura	0	0	1,249	501	440	4,037	271	812
Kegalle	0	194	1,230	557	0	5,280	464	0
Total	**23,088**	**7,431**	**20,126**	**9,318**	**8,153**	**147,943**	**14,014**	**8,513**

Source: Author Compilation.

Figure 4: Site Selection



Source: Author Compilation.

3.1.6 Press Release

It was identified that there is a large number of freelancers and unregistered self-employed professionals in the creative industry sector. Thus, a press release was published in the *Daily FT* and *Daily Mirror* on 28 October 2019 (Figure 5) inviting people to register with the study team for the mapping exercise.

Figure 5: Press Release on Mapping Creative Industry Study


Daily FT Be Empowered
e-Paper ABOUT US ARCHIVES CONTACT
HOME COLUMNISTS FT CLICK FT LITE EDITO

HOME / BUSINESS/ IPS AND BRITISH COUNCIL TO MAP CREATIVE INDUSTRIES IN SRI LANKA

IPS and British Council to map creative industries in Sri Lanka

Comments / 450 Views / Monday, 28 October 2019 00:48

Twitter Facebook WhatsApp

The British Council in Sri Lanka and the Institute of Policy Studies of Sri Lanka (IPS) are seeking to map the creative sector to include and reflect a wide spectrum of the creative sector in this exercise, (i.e. personnel engaged in businesses or professions in the creative industry).

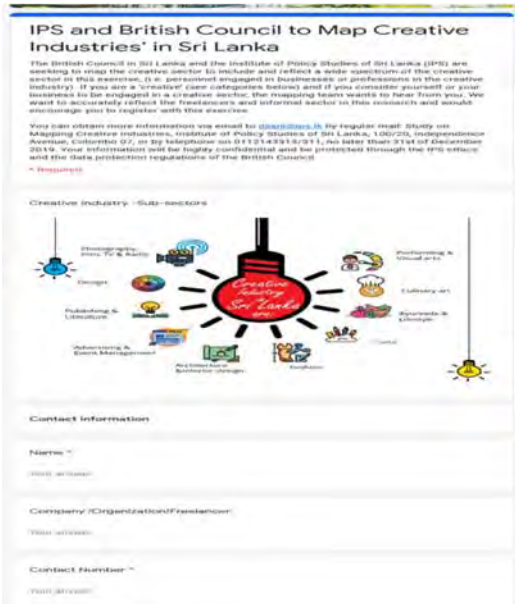
If you are a 'creative' (see categories below) and if you consider yourself or your business to be engaged in a creative sector, the mapping team wants to hear from you. The British Council wishes to accurately reflect the freelancers and informal sector in this research and would encourage

Source: Daily FT. (2019, October 28). *IPS and British Council to Map Creative Industries in Sri Lanka*. Retrieved November 10, 2019 from http://www.ft.lk/business/IPS-and-British-Council-to-map-creative-industries-in-Sri-Lanka/34-688475.

3.1.7 On-line Sign in System

Moreover, an on-line sign in system was also created to obtain a count of self-employed professionals and freelancers (Figure 6).

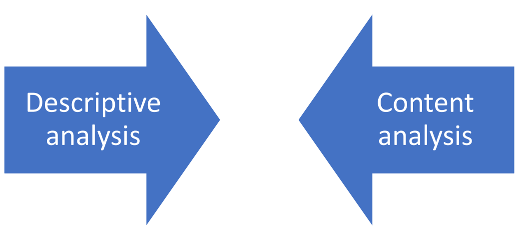
Figure 6 : On-line Sign in System



Source: Online sign in form accessed from https://forms.gle/98wvuxFBHaX1td917.

3.2 Data Analysis

Data analysis was mainly carried out using two methods, namely content analysis and descriptive analysis. Content analysis of qualitative data (primary and secondary) consist of several steps, including preparing the data for analysis, reading through all the data, coding data, coding to generate themes, and narration of findings from the analysis (Creswell, 2003). Descriptive analysis of quantitative data summarises the characteristics of the data set. It consists of two basic categories of measures namely; measures of central tendency and measures of variability.



Source: Author illustrations.

FGDs and KIIs were digitally audio recorded (with the permission of the participants) which enabled revisiting the information and obtaining an accurate rendition. All voice recorded interviews were transcribed, and translated from Sinhala to English where required. During the FGDs and KIIs, notes were taken to minimise the threat of data loss in the event of possible malfunctioning of the recording equipment.

Qualitative data collected from the field was analysed using the method of 'Content Analysis. Content analysis of qualitative data (primary and secondary) consists of several steps, including preparing the data for analysis, reading through all data, coding data, coding to generate themes, and narration of findings from the analysis (Creswell, 2003).

Some sections were analysed using NVivo, a software widely used for qualitative data analysis. NVivo is a powerful tool of analysing sophisticated data and coding it, and it supports the building of theories. NVivo is also very helpful in easily organising different data types and sources as used in the study (Ozkan, 2004).

Secondary data was analysed using the STATA statistical software as well as other descriptive and statistical analysis, including cross tabulations, graphs and figures.

3.3 Quality Assurance Mechanism

The quality of research undertaken was assured through several ways, including triangulating through multiple methods of data collection (consultation workshops, KIIs, desk research etc.) and multiple sources, member checking (relevant sections of the study were sent to some of the key informants and experts to obtain their feedback), and a validation workshop (Annex 8) with main stakeholders to validate the findings and mapping of the creative industries.

Moreover, to ensure the quality of research outputs generated by the study, a SC was set up. The SC, formed of creative industry experts from the British Council, business leaders, academia etc. (Annex 5), provided guidance and technical inputs to the research team throughout the entire duration of the study, from its conceptualisation onwards. Additionally, a brainstorming session (Annex 9) was conducted with sector specialists to identify the main subsectors relevant to Sri Lanka's creative industry, before commencing the study, while consultations with British experts were also conducted periodically. Figure 7 illustrates the quality assurance mechanism process discussed above.

Figure 7 : Quality Assurance Mechanism

Source: Author illustrations.

3.4 Limitations of the study

Firstly, calculating the economic value of the creative industry sector was a challenging task, due to gaps in available secondary data sources, combined with a reluctance on the part of survey respondents to answer related questions during the field survey. Secondly, identifying people for some sectors (TV, radio, film and video) were also a difficult task, given both the limited number of individuals engaged in those areas, and difficulties in fixing appointments with those involved due to their busy schedules.

4. The Cultural and Creative Industry in Sri Lanka

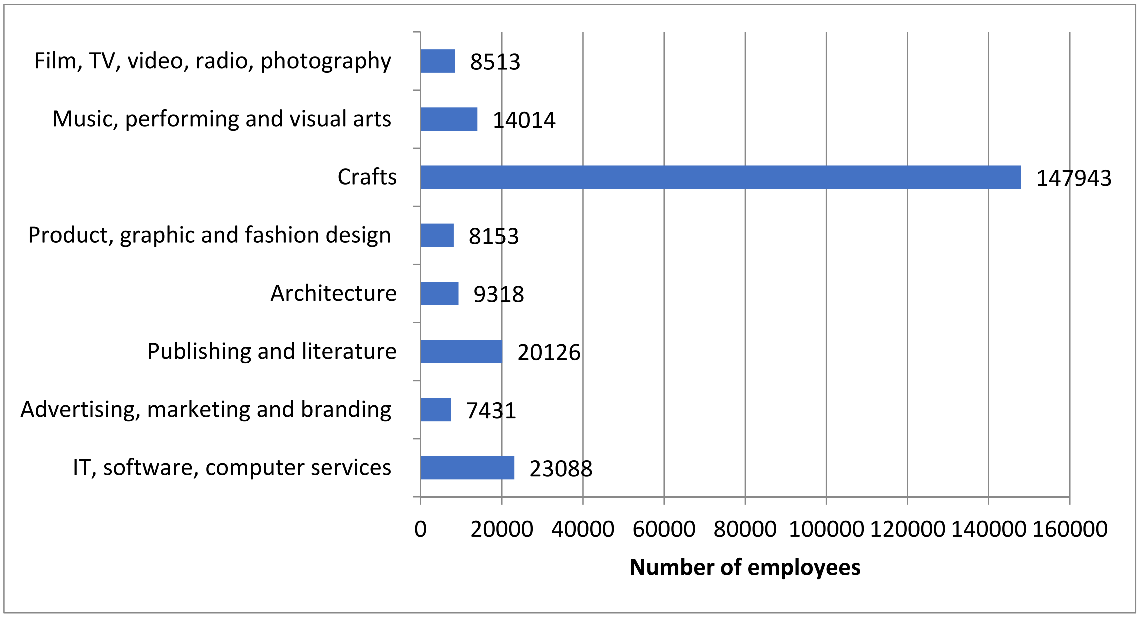
4.1 Findings from LFS data analysis

Nearly 238,586 individuals are employed in the identified creative occupations in 2017. Given a total sample of 8,205,907 employees in the same year,[12] creative workers account for approximately 3% of the total labour force. Approximately 62% of these creative workers are engaged in the craft sector.[13] IT and publishing sectors are in the second and the third places.

Figure 8 shows total creative employee numbers by subsector. As can be seen, the crafts sector employs the largest numbers, while the advertising accounts for the lowest.

12 The total sample involves all individuals engaged in some form of paid employment, own account profitable work or contributing family work as an economic activity.

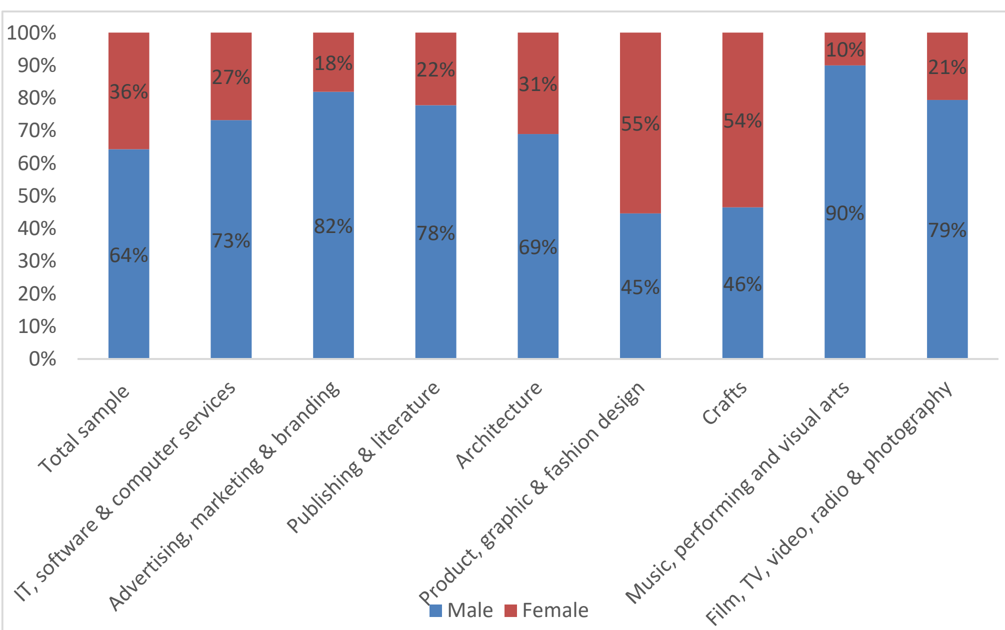
Figure 8 : Employee Numbers by Subsector, 2017



Source: Own calculations using 2017 LFS data.

Figure 9 shows the gender composition of employees engaged in the different subsectors. In line with overall employment trends in the country, males account for a significantly larger share of employment in many creative subsectors, with the exception of the design and crafts sectors.

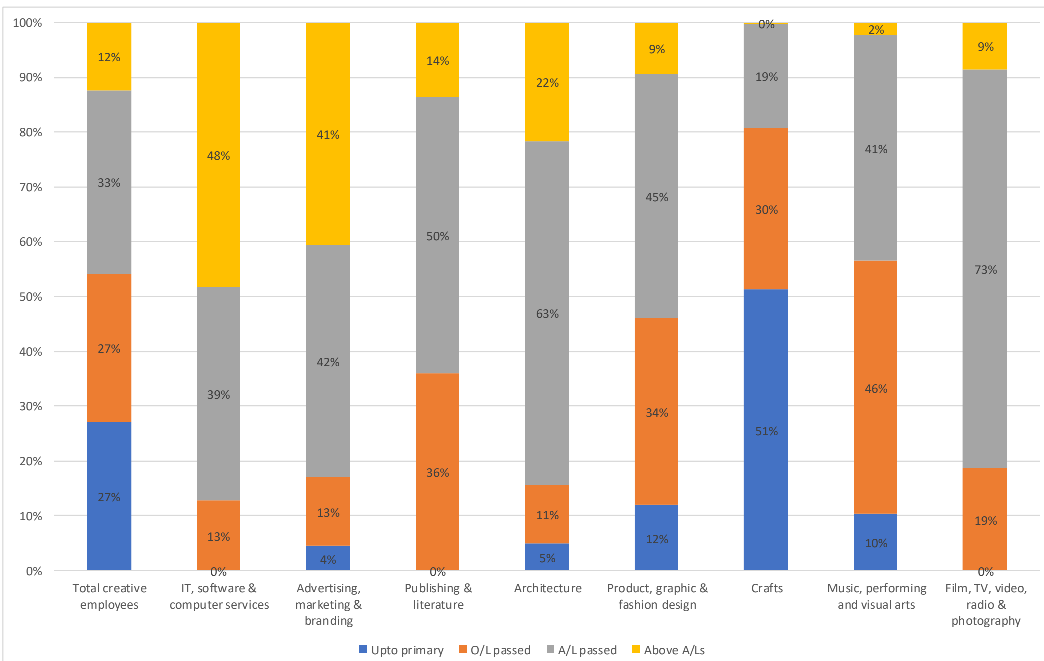
Figure 9: Gender Composition of Employees in Creative Industries, 2017



Source: Own calculations using 2017 LFS data.

Figure 10 depicts the education levels of the total creative employee sample and of the different subsectors. The largest share of creative workers in the overall sample (72%) have passed G.C.E. Ordinary Level (O-Level) qualifications and 45 % of them have passed G.C.E. Advanced Level (A-Levels) and above qualifications. Not surprisingly, the IT sector accounts for the largest share of employees with degree and above qualifications at 48%, while the advertising sector also consists of a large share of relatively well-educated individuals with G.C.E. Advanced Level (A-Levels) and above qualifications. Employees who have passed the A-Levels are also high and account for over half of total workers engaged in the film and photography, and architecture subsectors. On the other hand, design (12%), crafts (51%), and visual and performing arts (10%) have not completed up to O/Ls.

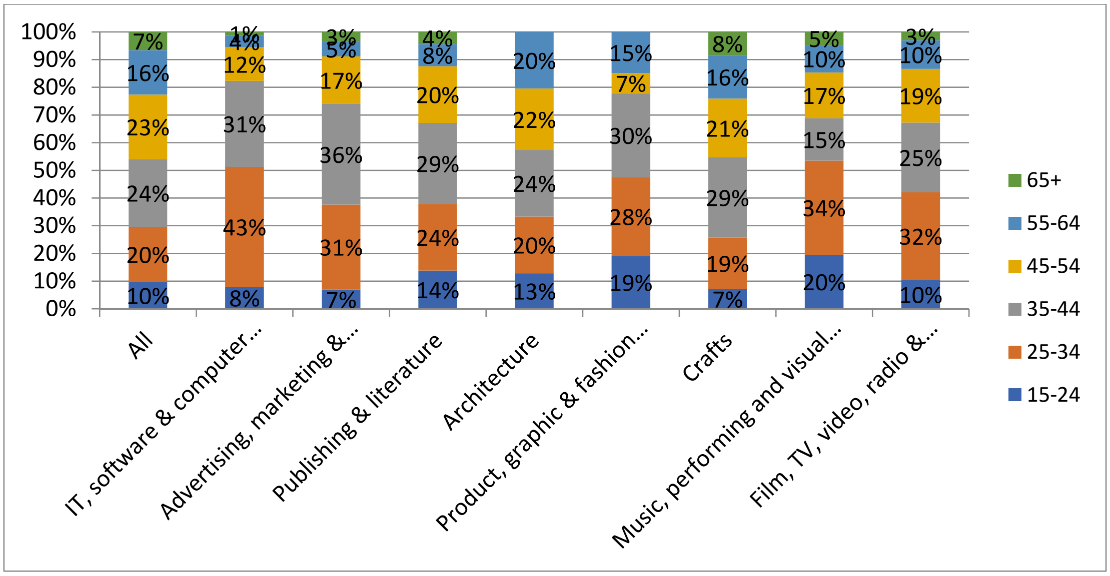
Figure 10 : Creative Employees by Subsector and Level of Education



Source: Own calculations using 2017 LFS data.

Figure 11 graphs creative employees according to age groupings. In most creative subsectors, the highest shares of employees are between the ages of 25-44. Creative employees above 55 years of age are highest in the crafts and architecture subsectors. The IT, Design, and Advertising sectors have younger employees, with 51%, 47%, and 38% respectively being under the age of 35.

Figure 11 : Creative Employees by Subsector and Age, 2017



Source: Own calculations using 2017 LFS data.

Table 7 shows the numbers and shares by employment status, in each creative subsector. The number of employees account for the largest share in a majority of subsectors, with the highest number and share recorded in crafts subsector. The share of self-employed workers is also high in the craft sectors. Unpaid family workers are also mostly observed in the craft sector, which makes sense, given that there are many home-based establishments.

Table 7: Employment Status in Creative Subsectors, 2017

Subsector	Numbers					Share (%)			
	Employee	Employer	Self-Employed	Unpaid Family Worker	Total	Employee	Employer	Self-Employed	Unpaid Family Worker
IT, software & computer services	18,458	2,251	2,055	325	23,089	80	10	9	1
Advertising, marketing & branding	6,033	320	1,077	0	7,430	81	4	14	0
Publishing & literature	12,452	1,191	4,508	1974	20,125	62	6	22	10
Architecture	7,107	0	2,214	0	9,321	76	0	24	0
Product, graphic & fashion design	2,927	281	3,877	1066	8,151	36	3	48	13
Crafts	52,841	7,135	74,405	13561	147,942	36	5	50	9
Music, performing and visual arts	8,683	699	4,631	0	14,013	62	5	33	0
Film, TV, video, radio & photography	4,462	178	3,629	243	8,512	52	2	43	3

Source: Own calculations using 2017 LFS data.

Table 8 illustrates similar figures by nature of employment for paid employees, i.e. the first subgroup in the above categorisation. Permanent employees account for a large share in the IT, event management, advertising, publishing, and design subsectors. Temporary workers, on the other hand, are more prominent in the crafts, culinary and beauty culture subsectors, while the craft subsector also accounts for the largest share and the highest number of casual employees, reflective of self-employed and unpaid family workers in the employment status categorisation. The Film, TV, video, radio & photography sector accounts for the largest share of employees without a permanent employer.

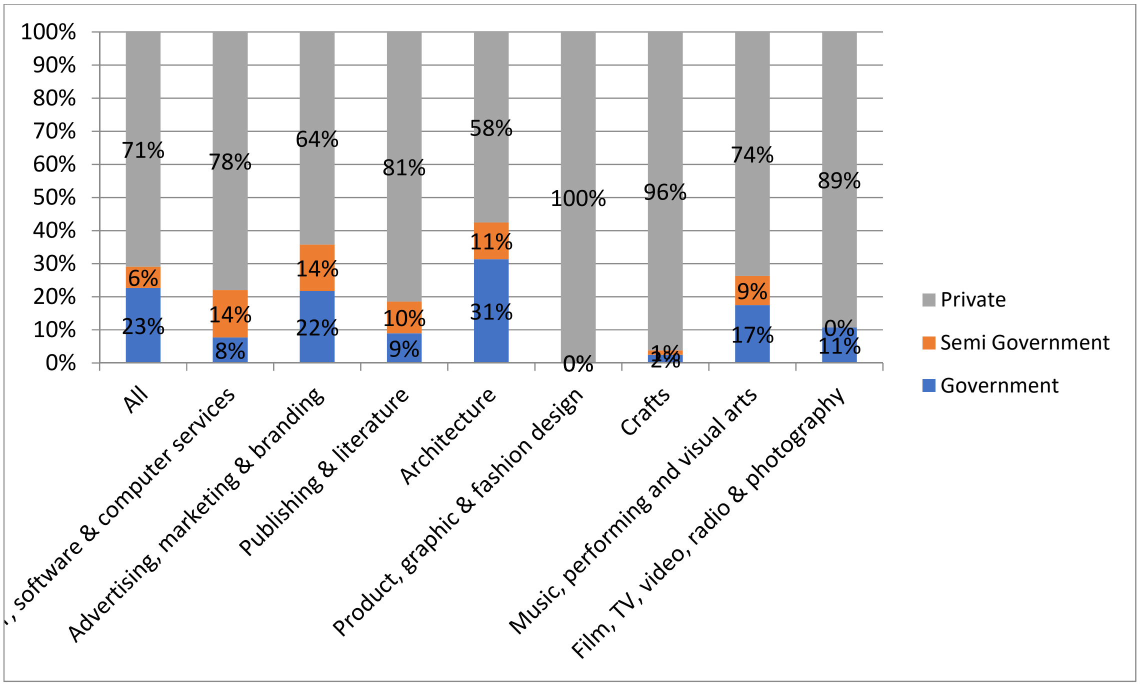
Table 8 : Nature of Employment among Paid Employees by Subsector, 2017

Subsector	Numbers				Share (%)			
	Permanent	Temporary	Casual	No Permanent Employer	Permanent	Temporary	Casual	No Permanent Employer
IT, software & computer services	16,175	1,360	923	0	88	7	5	0
Advertising, marketing & branding	4,099	1,353	235	347	68	22	4	6
Publishing & literature	7,332	4,127	764	229	59	33	6	2
Architecture	3,747	2,006	332	1,021	53	28	5	14
Product, graphic & fashion design	1,721	1,207	0	0	59	41	0	0
Crafts	7,856	28,951	10,329	5,706	15	55	20	11
Music, performing and visual arts	1,929	4,013	951	1,789	22	46	11	21
Film, TV, video, radio & photography	1,804	2,113	546	0	40	47	12	0

Source: Own calculations using 2017 LFS data.

Figure 12 illustrates the sectors of institutions in which creative employees are employed. Consistent with the trend for overall employees, a vast majority of creative employees belong to institutions in the private sector in all creative subsectors with the exception of architecture, where, while the private sector still accounts for over 50%, there is a sizeable share belonging to the state sector as well. The advertising and performing arts subsectors also consist of sizeable shares of employees attached to the government and semi-government sectors.

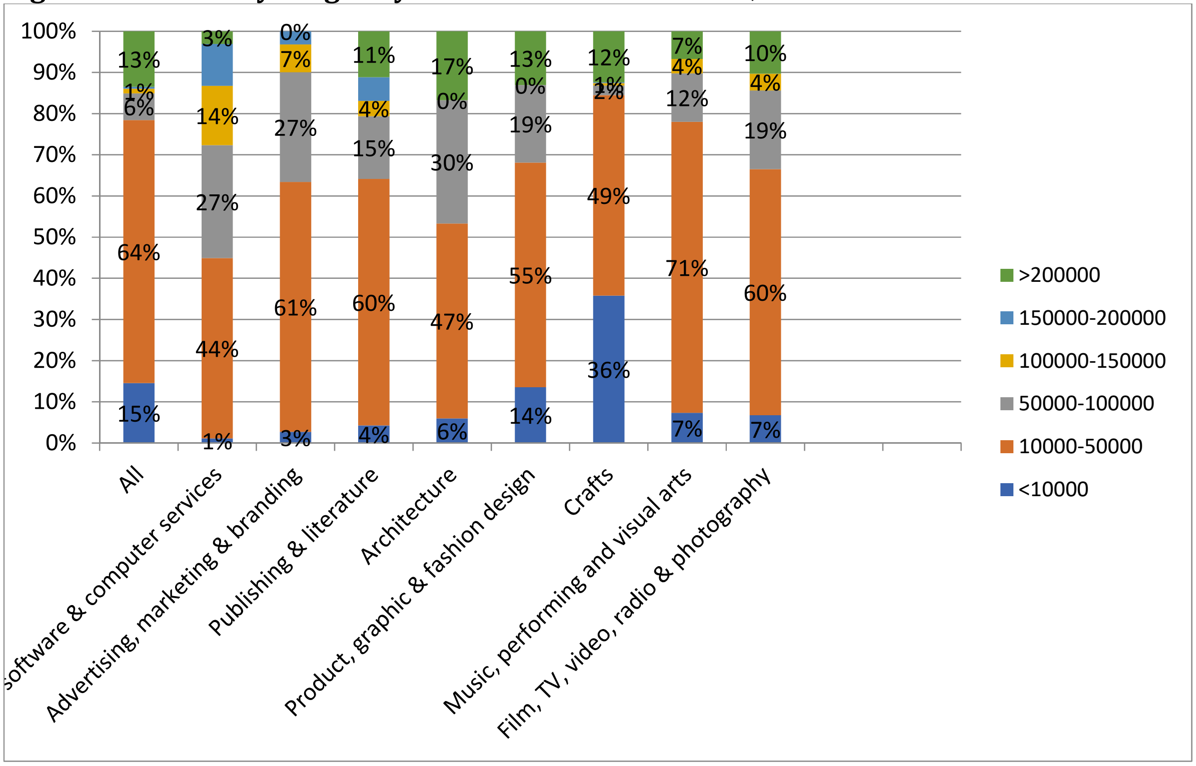
Figure 12: Creative Employees by Sector of Institution Employed, 2017



Source: Own calculations using 2017 LFS data.

Figure 13 graphs average monthly wages earned by creative subsector employees. Consistent with the overall trend, a majority of creative employees earn between Rs 10,000-50,000 per month. More than 35% of employees in the crafts sector earn below Rs 10,000 per month. The mean monthly wage of the creative sector is Rs 29,418 where the national means is Rs 33,894. All the creative industry subsectors' mean monthly wage are above the national mean, with the exception of crafts and product, graphic and fashion design. All other sectors earn above Rs 40,000 on average.

Figure 13 : Monthly Wages by Creative Subsector in Rs, 2017

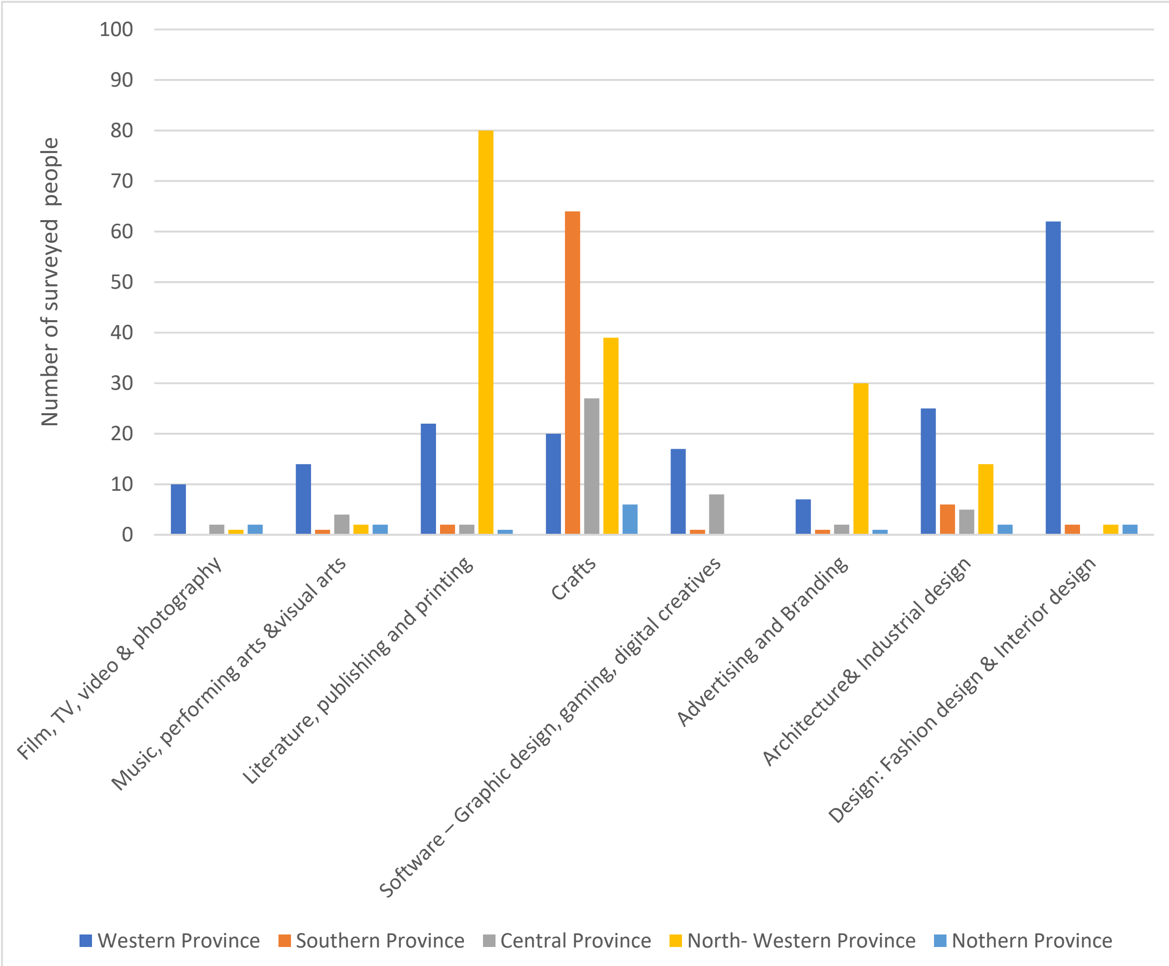


Source: Own calculations using 2017 LFS data.

4.2. Findings from the Field Survey

According to the field survey data the highest number of people who are engaged in creative industry subsectors are from the Western province. Additionally, the Southern Province is popular for crafts. Further, the North-Western province has shown a significant involvement in the literature and publication subsector.

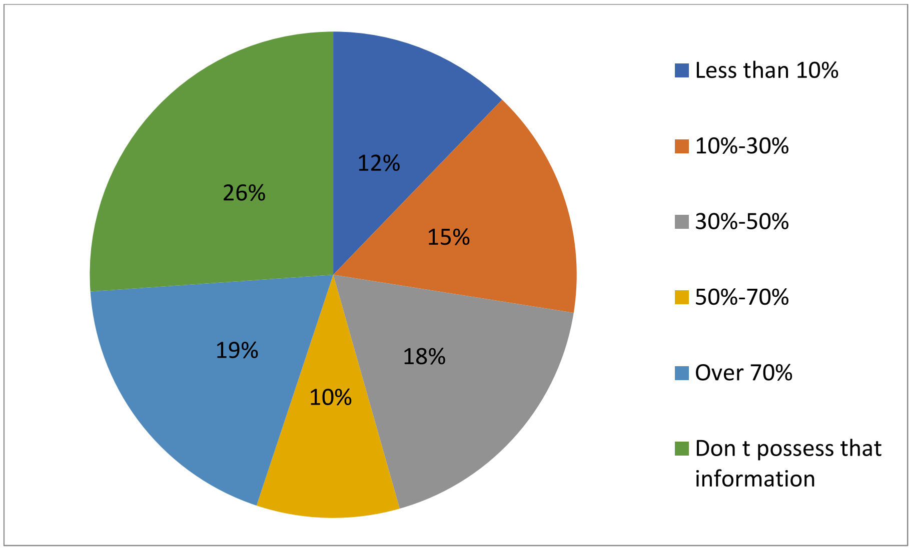
Figure 14: Provincial Distribution of Subsectors



Source: Field survey data calculations.

Income generation from creative industries is shown in Figure 15. The majority of the respondents earn between Rs 10,000-50,000, consistent with analysis using secondary data from the LFS. However, it should be noted that only 44% of the interviewed sample stated their income, largely belonging to the crafts subsectors. It is interesting to note that a higher percentage of a respondent's income is generated from creative activities of their respective businesses, as opposed to non-creative or routine activities. As shown in Figure 15, 28% of the respondents stated that more than 50 of their income is generated from creative activities.

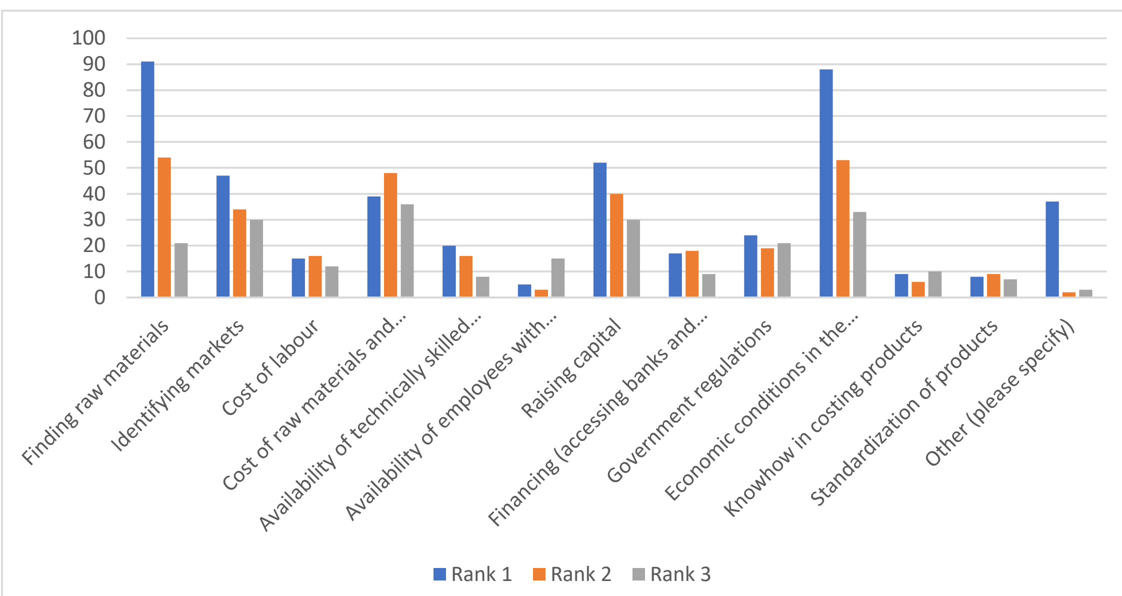
Figure 15: Income Generation



Source: Field survey data calculations

Business related constraints faced by respondents are illustrated in Figure 16. Respondents were provided with a choice to rank the identified constraints, as constraints could be different from subsector to subsector.

Figure 16: Business Related Constraints

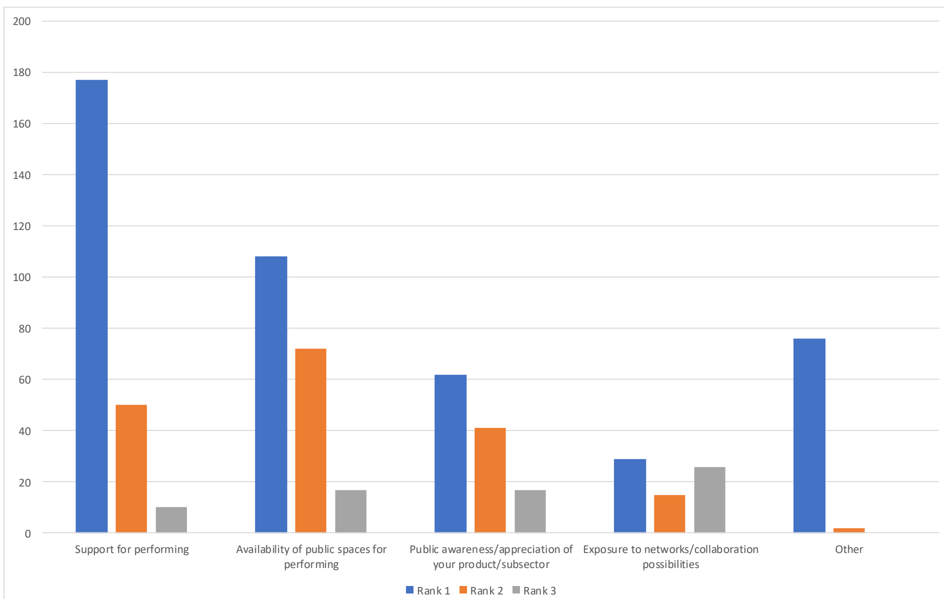


Source: Field survey data calculations.

According to respondents of the survey, the economic condition of the country was one of the major constraints. Moreover, finding raw materials, raising capital, and identifying markets are a few other constraints faced. Under, the "other" category, common issues stated include language barriers, competition with counterfeit products, and transport issues.

Apart from the main business constraints, respondents were allowed to rank a few other constraints, specially focusing on the creative service sector. Support for performance and availability of public places were ranked as top constraints when performing creative services. Lack of language knowledge, book keeping, accounting were the other constraints that they highlighted.

Figure 17: Other Constraints

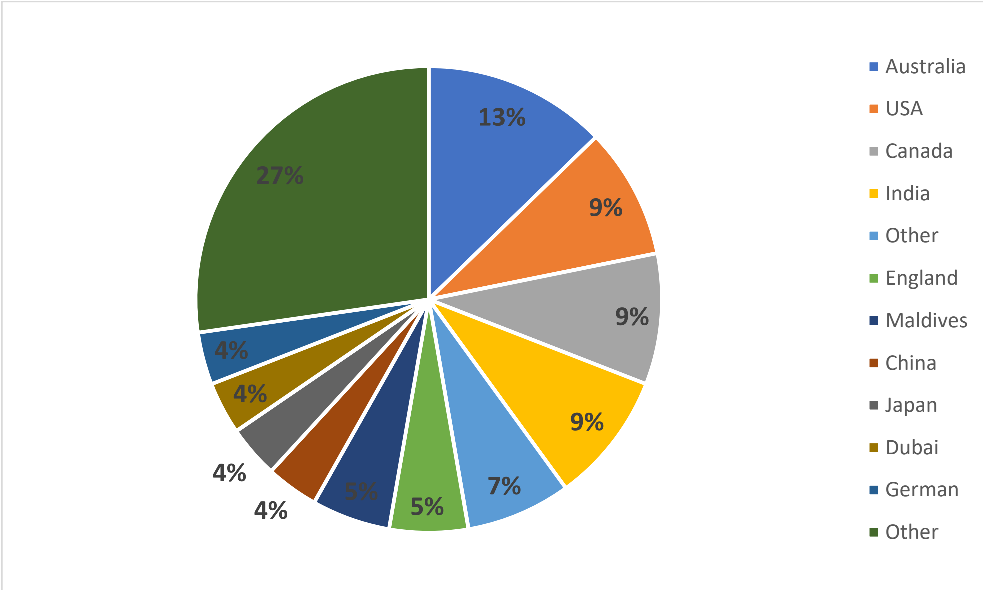


Source: Field survey data calculations.

Notably, 84% of the respondents stated that all their clients are local buyers. However, 5.3% of the respondents provide for both local and foreign buyers; 4.6% export their products, the majority of which are exporting to Australia, India, Canada, and the U.S., as shown in the figure below.

Architecture, Interior Design and Fashion had the lowest amounts of export activity, with only 5-6% of the survey respondents having some amount of export business. Advertising & Branding, Software (including Graphic Design), and Crafts all have between 18-20% of their respondents having some degree of export activity. Three craft businesses had 100% export market, which suggests the immense potential of ventures in this industry.

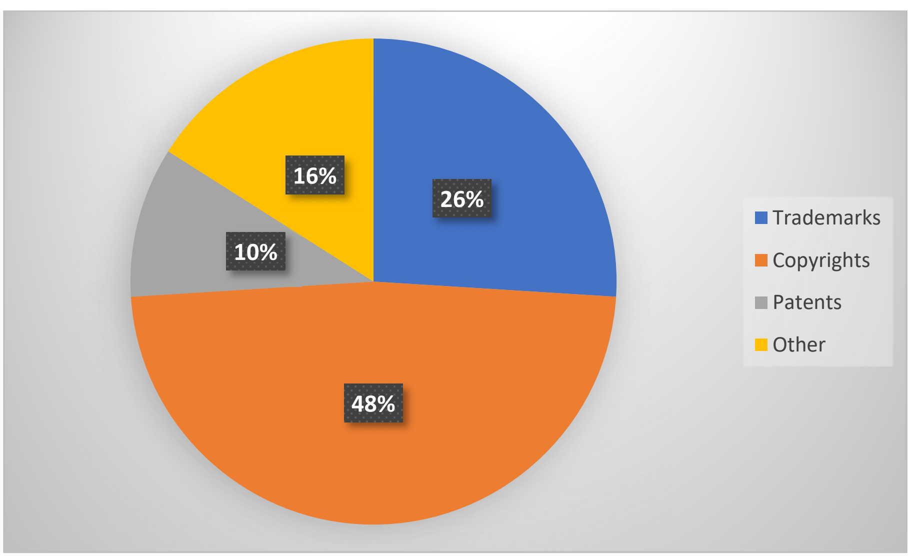
Figure 18: Main Exporting Countries



Source: Field survey data calculations.

Respondents' awareness on Intellectual Property Rights (IPRs) are very minimal. Those who have obtained IPRs to protect their business or services amounts to a negligible share (nearly 9% of the respondents). Copyrights and trademarks are most popular IPRs amongst them (Figure 24).

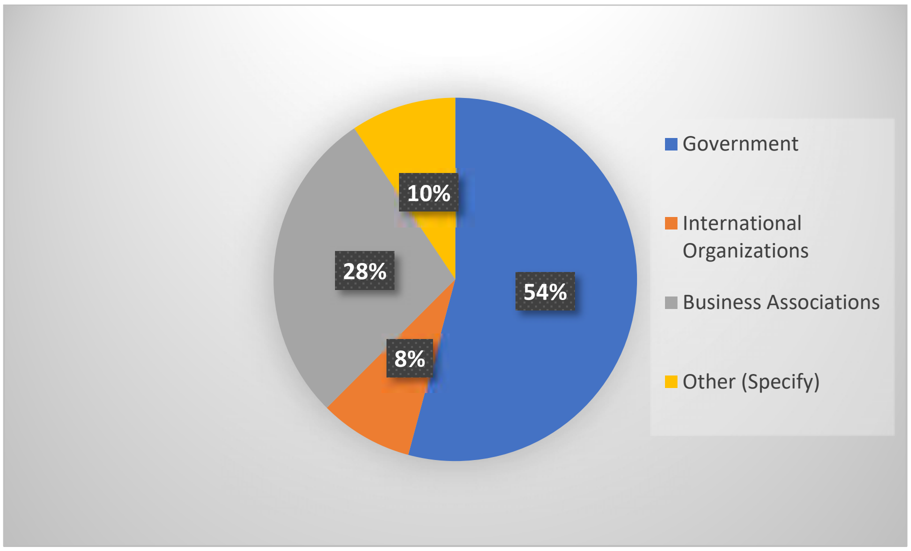
Figure 19: Obtaining Intellectual Property Rights



Source: Field survey data calculations.

Nearly 21% of the respondents have collaborations with the government, international organisations or with business associations when operating their business. As depicted in Figure 25, the largest share of collaborations are with the government, followed by business associations. Moreover, some collaborations take place at the village level with community-based organisations such as micro finance associations, death benevolent societies etc.

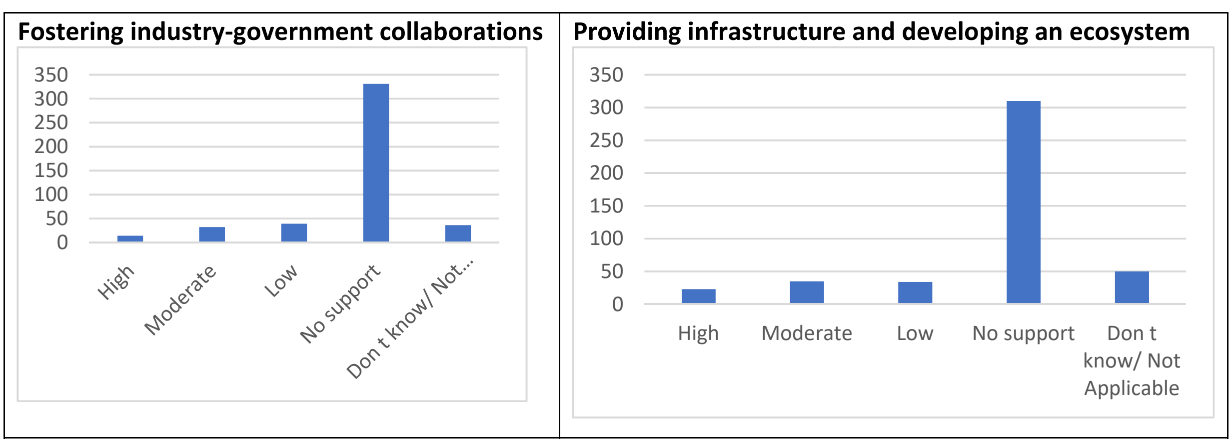
Figure 20: Business Collaborations



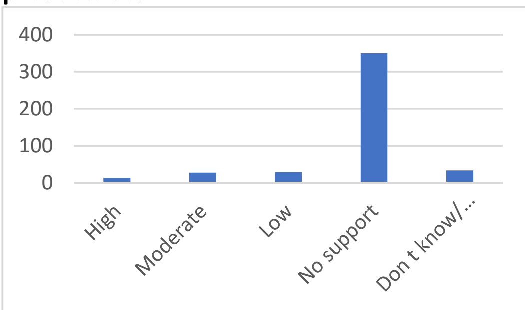
Source: Field survey data calculations.

As shown in Figure 26, respondents ranked their views on government support in selected areas. Worryingly, respondents claim that government support is very low in almost all areas except for support provided for attending exhibitions and trade shows.

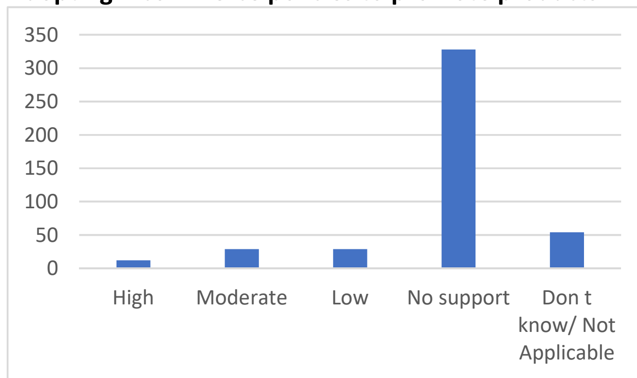
Figure 21 : Industry Policy and Government Collaborations



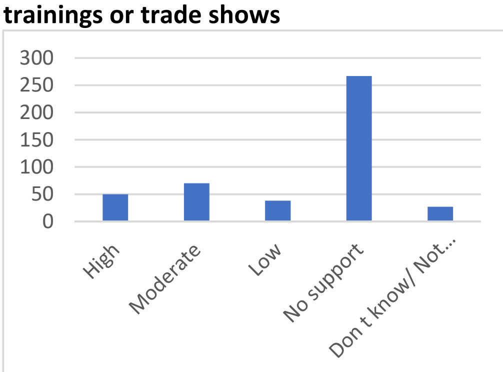
Providing support to identify new markets/ products etc



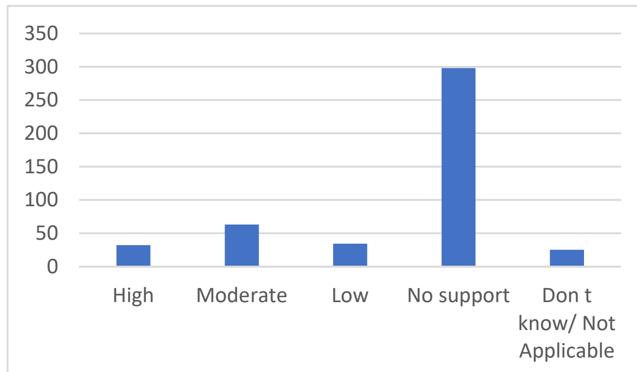
Adopting E-commerce policies to promote products



Providing training and support to attend trainings or trade shows



Providing opportunities to facilitate talent



Source: Field survey data calculations.

4.3 Calculation of Economic Value

Sri Lanka's creative economy has shown a steady growth between 2010 to 2014, rising from US$ 433.62 million in to US$ 845.41 million in contributions to GDP, i.e. a 95% growth, calculated from exports of creative goods and services (Figure 22).

Figure 22: Creative Goods and Services Exports in Sri Lanka

COUNTRY PROFILE- Sri Lanka										
Creative Industries Trade Performance, 2005-2014						Value in Million US$				
Sri Lanka	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Exports	159,97	169,08	159,37	177,25	143,21	168,62	193,16	191,76	215,88	217,51
Imports	322,76	338,70	349,22	421,07	364,83	380,95	522,48	502,23	453,08	523,32
Balance of Trade	-162,79	-169,62	-189,85	-243,82	-221,62	-212,33	-329,32	-310,47	-237,20	-305,81

CREATIVE SERVICES

SRI LANKA					
Value in millions of $	2010	2011	2012	2013	2014
EXPORTS	265,0	355,0	564,0	604,4	627,9
Charges for the use of intellectual property n.i.e					
Other business Services					
Personal, cultural and recreational services					
Telecommunications, computer, and information services	265,0	355,0	564,0	604,4	627,9
Computer services	265,0	355,0	564,0	604,4	627,9
IMPORTS			139,3	280,9	300,3
Other business Services					
Telecommunications, computer, and information services			139,3	280,9	300,3
Computer services			139,3	280,9	300,3

Source: United Nations Conference on Trade and Development. (2018). *Creative Economy Outlook: Trends in International Trade in Creative Industries 2002-2015.* Retrieved November 15, 2019 from https://unctad.org/en/PublicationsLibrary/ditcted2018d3_en.pdf.

An approximate estimate of the GDP contribution of creative goods and services exports in 2014 was nearly 1.06%. Notably, only 4.6% of respondents to our survey were exporting, meaning this 1.06% GDP contribution is an underestimate that does not account for the domestic circulation. Particular industries signal high potential for development. Three of the craft companies participating in this study exclusively served an export market and one company (export and local circulation) reported a Rs. 220 million (US$ 1.2 million) turnover in 2018-2019 financial year. In the design sector, the total average annual revenue for design entrepreneurs was calculated to be US$ 7.2 million, using estimates from graduates of two leading design academies (private and government).[14] Finally in 2018, the IT sector's export revenue stood at US$ 1 billion and the 2022 revenue target is projected at US$ 5 billion for 2022, signaling the expansion of design-related IT services as well.[15]

4.4 Creative Industry Subsectors

4.4.1 Photography

Overview

The broad field of photography consists of several subfields. Namely; art photography, experimental Photography, human emotions photography, landscape photography,

14 Calculations made from a combination of research from the Academy of Design, SLASSCOM and JAAF releases.

15 Calculations made from a combination of research from the Academy of Design and SLASSCOM releases.

wildlife photography, studio photography, commercial photography, fashion photography, architectural photography etc.

While it is difficult to give an exact estimate, there are around 200-300 photography studios operational countrywide, with various photographic associations and societies spread across the country. Providing an estimate of the number of people engaged in the sector is even more challenging, given the ability to operate without any formal registering, in the absence of an accredited professional photographic regulatory body. The number is estimated to exceed 1 million (i.e. 10,000,000). Nevertheless, while commercial photography was a significant part of the Sri Lankan economy until about 15 years ago, the advent of the digital industry has ruined the creativity in the sector. Digitisation has replaced creativity by mere copying and photoshopping.

The sector's contribution to domestic production is minimal, given that all photography-related equipment is imported. The consumer market is primarily domestic, with wedding photography accounting for a large 80-90% of the entire photography sector.

At present, only the University of Kelaniya offers a degree programme in photography, in addition to a one-year diploma course. Additionally, diploma courses are offered by the Sri Lankan Foundation Institute, the Lionel Wendt Photographic Society and the National Photographic Arts Society, which are linked to the FédérationInternationale de l'ArtPhotographique, or FIAP in France,an international organisation of national associations of photography, which gives a rare honorary of Master of Photography (MFIAP). Around 10-15 students obtain diplomas annually from the National Photographic Arts Society, while only one Sri Lankan has obtained MFIAP qualifications.

The Photographic Society of Sri Lanka, established in 1906 with the objective of promoting photography as a hobby, art, and craft, is the main representative body in the photography sector. Additionally, the Press Photographers Association in Colombo acts as the sole professional association, although there does not exist any professional body to control and regulate the sector. Other (non-professional) associations and societies operate in different provinces, which are informal in nature and more akin to clubs.

Import taxes and levies exert large negative impact on the industry, given that all photography-related equipment has to be imported. The small-scale nature of the industry combined with the high cost of equipment, magnifies the problem. Sri Lankan photographers also have to compete with those services offered cheaper by Indian photographers.

The Department of Cultural Affairs, under the Ministry of Higher Education and Cultural Affairs, is responsible for the photography sector. There is an established State Advisory Board for Photography under the Ministry.

Opportunities

The State Advisory Board is currently working towards addressing identified key challenges in the sector. For instance, the Board is currently in the process of launching a Photography Council – a body with powers to register photographers as professionals based on qualifications and experience. The Board is also working towards establishing an academy for photographers within the next two years. Additionally, the granting of lifetime awards for photography on a yearly basis, with attempts to involve individuals from across the country, is another positive endeavour.

Constraints

Sri Lanka's photography industry lacks professionalism compared to other countries. Subsequently, the industry lacks basic ethics and professionalism. The high cost of photography-related equipment is another issue. Setting up colour labs, studios and printers, as well as the chemicals and software needed for manufacture are costly, which are further amplified by prevailing import duties. The low number of technicians, especially those trained in digital skills, have led to photographers encountering problems with regard to repair and maintenance. The limited number of photographic exhibitions taking place in the country, and insufficient opportunities for Sri Lankan photographers to showcase their work is another identified issue.

Development Priorities

The foremost priority identified is to establish a regulation body to monitor professionalism and ethical behaviour in the industry. A proper academy offering well-structured high-quality photography education and training courses is another priority Encouraging the domestic manufacturing of photography related equipment and software, Lowering import taxes to facilitate the capacity of the domestic industry to compete with Indian companies, Increased government recognition and funding to attend international shows to further nurture and develop local talent and provide international exposure to talented photographers

4.4.2 Performing and Visual arts

Overview

Performing arts include dance (ritual dance, entertainment dance/ stage dance), drama and theater (serious drama, comedy drama) and music (bands, musicians, opera etc.). Stakeholders involved in performing arts are mainly the audience, performing artists, funding agencies/sponsors, designers (set designers, sound, light etc.), writers, directors etc. In visual arts, artists, customers, galleries consist of the main stakeholders. It is quite difficult to identify an exact number of artists. However, as per the available data from multiple sources there are nearly 2,457 performing artists and 83 visual artists.

Furthermore, approximately 19 English theatre companies and more than 30 TV stations are currently in operation, although actual numbers are most likely larger than what available data suggest. In the visual arts sector, on the other hand, there are a very few number of galleries, out of which many are in Colombo, with a few operating in the Galle and Jaffna districts.

There are very few local professional associations involved with performing artists in Sri Lanka. The Outstanding Song Creators Association (OSCA) and Sri Lanka Singers Association (SLSA) exist for Sri Lankan singers. While there is no national association for visual artists, there are a few associations established regionally, such as the Kandyan Dancers Association situated in Kandy, and the Kandyan Singers Association, Moratuwa Visual Artists Association dedicated to singers, dancers and visual artists. Further, some of the visual artists are members of international associations including the International Association for Museums, the International Association of Museums of History and the International Council of Museums.

Opportunities

The Sri Lanka Arts Council was set up in 1952 by an Act of Parliament to support performance and visual art works in Sri Lanka. Presently, this council is under the purview of Ministry of Housing, Construction & Cultural Affairs. There are several advisory boards, such as the State Drama Advisory Board, the State Ballet and Puppetry Advisory Board, the State Arts and Sculpture Advisory Board, and the State Music Advisory Board established under the Arts Council to support performance and visual artists. However, it is very discouraging to note that the artists are not directly linked with these advisory boards to obtain any support. Moreover, while there are several expert panels to support artists, lack of awareness on these avenues of support entities is an issue, as highlighted during FGDs.

> "Although there is a council established in this regard, it is not active and effective since it lacks officials with the correct focus and knowledge. We can hardly reach them."
>
> *FGD participants*

Further, as per the Entertainment Act (amended) No. 37 of 1984, The Art Council of Sri Lanka acts as the authority for issuing certificates for the consideration of the exemption of entertainment taxes when performers are all amateurs. Certificates will be issued after assessing the information provided and thereafter the entertainment taxes will be deducted by the respective Municipal Councils and from the Divisional Councils.

There are several award ceremonies and festivals introduced by these government institutes. Some examples include the State Television Awards Festival, the

Kalabhooshana Award Festival, the National Drama Festival, the State Short Drama Festival, and the State Children's Drama Festival. Cultural centers have also been established in each district which come under the purview of the Ministry.

There are several projects and grant facilities implemented by the government to support and encourage performance and visual artists, including the Traditional Painters Project (similar to a diploma course), providing aid to register art centres, operation of 'National Trust for Artists Grants' to various cultural items and persons who have performed well (financial assistance for 'Perahera' artists, death donations, medical aid etc.), Kaladevi insurance for artists, and the Saraswathi pension scheme. In addition, there are provincial level award ceremonies conducted by Provincial Councils. Nevertheless, it should be noted that most of the artists are unaware of these programmes and some of them are unsatisfied with the operation of these programmes and grants.

The University of Visual and Performing Arts, the Sri Palee Campus of University of Colombo, and the Open University are the main educational institutes which offer degrees for performing artists. The Drama and Theatre School at the Tower Hall Foundation offers diplomas.

Constraints

Lack of proper social recognition for performing and visual artists is key. Lack of coordination amongst government institutes when implementing programmes, festival and award ceremonies, is another identified issue. Thus, artists are not aware of some of the programmes. There is also no proper monitoring mechanism in these institutes, with district level cultural centers operating in an isolated environment, which has in turn led to a drop in the standards of the services provided.

Presently, there is no visual art festival or award ceremony to encourage visual artist, while the demand for visual arts is also low in Sri Lanka as it is getting increasingly digitised with the adoption of new technologies.

Lack of infrastructure is another constraint that both performing and visual artists are facing. There exist a limited number of galleries and theaters, and most of them are concentered in Colombo. Further, artists have to wait in a long list to reserve a place.

Another challenge is the lack of connectivity and coordination, where several artists operating in villages have to work in isolation. Moreover, most of the companies, production houses, and TV stations are situated in Colombo. Village artists have limited access to these stations.

Development Priorities

The importance of implementing a national policy for arts in consultation with eminent artists, educationalists, cultural experts was an identified priority. Reducing or abolishing importation tax on books (other than educational), lights, arts material, photographic equipments etc. which are used by artists, is also important. Further, it is essential to give due recognition to these artists by way of sharing success stories etc. Providing government support through improving infrastructure, providing facilities and conducting awareness programmes were other highlighted priorities.

The need to encourage more arts festivals annually in Sri Lanka akin to the Colomboscope, Jaffna Cinema festival, Galle literary festival etc. Colombo scope is the only Sri Lankan festival platform for the contemporary arts and interdisciplinary dialogue with historians, authors, musicians, filmmakers and performers etc.

4.4.3 Publication and Literature

Overview

Literature can be mainly divided into two sections: fiction and non-fiction. These two sections can again be categorised in to novels, short stories, poetry, children's stories, translations, fictional stories, history, medicine, science, experimental literature, religious, cultural, heritage etc.

A publisher primarily engages in activities including assessing a manuscript received from a writer or producer, editing, typesetting, designing, liaising with printers, as well as marketing and advertising on TV, radio and social media. The entire process taken to bring out, publish and release a book, for example, can take up to two to three years. Some publishers focus on a specific area, such as work with a Sri Lankan component, or a particular type of literature.

Printing consists of packaging, label printing and publishing. Packaging involves printing items, cartons, boxes, packing boxes etc., while label printing refers to labels in bottles, shampoos etc. Publishing entails the printing of books, periodicals, magazines and annual reports.

There are around 100-200 publishers registered in the country at present, of which around seven to 10 are English publishers, plus 600 printers operate in the country. The market currently caters mainly to local authors and producers.

English, Sinhala and Tamil literature are offered as subjects in both Sri Lankan schools (at the G.C.E. Ordinary and Advanced Level examinations) and universities. However, while one's first language is compulsory until the Ordinary Level exam, both English literature and literature of the first language become optional at higher levels.

At the school level, there are several English, Sinhala and Tamil Day competitions organised for poetry, drama, speech, story-writing etc., which start from school and proceeds from the zonal, to the provincial, to the national level. The national winner in each category is awarded three (3) merit points for university admission purposes. Additionally, through a state-led programme, schools in the Western province take part in writing competitions, where selected writings from each grade are published in the form of a book. However, there is a lack of creative writing programmes and disciplines at the university level.

The Sri Lanka Book Publishers Association (SLBPA), established in 1984, is the main industry representative body for publishers, and has a current membership of 155. Additionally, there are several writers' associations catering to specific groups, such as district associations, religious associations – the National Catholic Writers Association –, newspaper associations – Gnanadeepaya Association – and an association named 'Gurugedara Education Employees Co-operative Thrift & Credit Society Limited', where selected books for teachers are published. There is also the 'English Writers' Collective of Sri Lanka', established to promote, publish and encourage creative writing across the country. This collective publishes their own magazine *Channels* annually to encourage young writers via literary competitions and publicity given to winners for their notable performances.

Similarly, the Sri Lanka Association of Printers established in 1956, represents the printing community in Sri Lanka, with the mission of promoting growth of printing, packaging, graphic and the media industry through the empowerment of Sri Lankan printers. The association represents the printing industry as a whole including printers, suppliers to the printing industry, and service providers.

In terms of government regulations, there are acts which restrict the nature of material that can be published. In the printing industry, to safeguard against misusing the printing authority to print unwanted material, an oath has to be given in court and a certificate obtained before practicing as a printer. Further, any printer who prints any book or periodical is bound by regulation to send it to the National Archive for future reference.

Opportunities

The annual international book fair held at the BMICH is an important opportunity for publishers and printers to promote their work and encourage readership, which is attended by large crowds. However, a tendency to buy stationery and exercise books as opposed to literature-related books was an identified concern.

For the printing industry, the innovation of tea bags has helped with higher numbers of companies and products emerging, which in turn has generated higher demand for printing.

Since 1958, the Sri Lankan government has conducted the 'State Literary Awards', a set of annual literary prizes under several categories including fiction, poetry, translations, songs and cover designs in all three languages. Awards are presented by the Department of Cultural Affairs.

In terms of financing, loans like 'Diribala' and 'Jaya Isura', which are given to small and medium enterprises in agricultural, industrial and business ventures including printing, help industries to invest in their businesses via concessionary interest rates, longer repayment periods, grace periods in which only the interest portion of the loan is required to be paid, and online banking facilities free of charge.

Constraints

Lack of ethics and professionalism in the industry, and the inability to detect plagiarism and other similar offences is one concern. A related issue is the absence of strict standards for translations of original work. Lack of standards for editing pieces of work and a shortage of skilled and competent editors is another concern. Lack of creative writing programmes and creative writing disciplines at the university level was also identified as a constraint leading to lack of competent human resources in the country. Lack of support and assistance to attend international book fairs is another constraint, especially compared to support extended by other international governments. The UK and the US, for example, have grants and awards for writers and first-time writers that promote the industry. There are also sector-specific incentives such as 'People's Choice Awards' by young readers for favourite children's book of the year etc. These promote writers and to purchase books that are not academic, but have been sanctioned by such awards and therefore, are more attractive for parents to purchase for their children. China also gives full support, financially and otherwise, to support the publishing and printing industries, where around 50% of the total cost is state funded to attend book fairs in London and Frankfurt.

Development Priorities

A key priority identified is to foster and cultivate the habit of reading and writing in children from an early age. A starting point is to generate awareness among parents of the importance of such habits, with requiring that at least 15 minutes per day being allocated by parents to read to their children. Standards should be set for editing, including paper design and layout, as well as stringent regulations to identify plagiarism and related offenses, with strict penalties being enforced in such cases. More writing and editing workshops and opportunities for writers to hone their craft would be beneficial to boost the English novel readership – creating more conversation around novels could facilitate higher demand.

4.4.4 Craft

Overview

Profile of the sector consists of several subsectors. More than 1,000 employees are involved directly or indirectly in these subsectors. Both male and female employees work in craft sector and majority of them are female.

Laksha, Painting, Pottery, Coir products, Reed mats ('Pan peduru'), Traditional handloom, Batik, Machine Embroidery, Hand Embroidery, Jewelry/ ornaments using copper and crochets, Bamboo products, Bags using cane and rattan, Products using palmyra leaves, Beeralu, Crochets, Carvings (wood, rock, gold, silver), Traditional Masks, Puppets, Traditional brass lamps and other products, Traditional Drums and other musical instruments, Sesath, Products from coconut shelves/ kale and Matalu, Kithul products, Pulp & Paper products, Traditional sculpture, Traditional Bali/Thovil/Shanthi karma and Leather Product can be identified as subsectors in craft.

In Sri Lanka, there are established cluster type craft sectors. Kandy is famous for brassware; Southern is famous for Crochets and Matale for Laksha. Kurunegala area is considered as an area which is mostly famous for pottery industry because of the availability of good quality raw material in the area.

There are business entities which are targeting people of the high-level and the foreigners while encouraging the ground level creative craftsmen. Kantala Brands, Selyn, Cane Couture are some of the examples of such entities.

This sector is governed by the policies of Ministry of Industry and Commerce. However, when transporting raw materials for industries such as pottery and wooden based, permits have to be processed accordingly. These are not sector specific policies or regulations.

Opportunities

The National Craft Council functions as the professional body representing the craft sector in Sri Lanka. It's not business driven, but much similar to a place where craft associated concepts are managed. Another professional body is the National Design Center. Ministry of Industry and Commerce - (Industrial Development Board) is also directly involved in this sector. National Enterprise Development Authority (NEDA), Vidatha Resource Centers, Industrial Development Board, Chambers of Commerce, Pradeshiya Sabha and Fashion Centers are also directly or indirectly contributing their support to the communities who are engaged in craft sectors.

In clusters there are many established formal and informal associations which support craftsmen. Pottery industry has "Eksath Creativity Pottery Association" which is registered under the Craft Council. Coir industry has the "Coir Association". There is a high level of corporation within these clusters as well as within groups of individual craftsmen.

Craft sector people needs information on updated technologies and awareness on current trends. In addition, they need training in various skills. There are some training programmes which are organised by the Department of Small Industries and the National Enterprise Development Authority (NEDA) to improve the knowledge and skills of the entrepreneurs in small craft-based industries.

Constraints

Difficulty in supplying raw-materials is one of the main constraints that are faced by most of the ground level craft people. The transportation barriers are one of the issues that they are facing with this regard. Not only the availability of raw materials, but also the quality. Difficulty in finding a market is another common issue specially with the individual entrepreneurs. They sometimes have small boutiques in roadsides and as such, have limited opportunity to sell. Lack of technology transferring is identified as one of the issues for these craft sector people. Not having a proper mechanism for craftsmen to enter to the export market and foreign market chains is another constraint.

Most of the respondents were elaborating that, currently younger people do not like to engage in the craft sector, as there is no proper mechanism with regard to training, marketing and financial opportunities.

4.4.5 Fashion Design

Overview

Fashion designers define the creative industry as an industry which constantly provides a variety of new products and services to the market. It is an industry in which you can put into use your creative skills to satisfy your customers. According to one respondent, creativity can be defined as:

To persist in this industry, adopting your creativity according to your customer's taste is considered as the most challenging task and predicting or understanding the customer taste is the toughest part of it. Creating a new trend requires more creativity than following an existing trend.

The main categories in fashion design are: Textile, Accessories (footwear, jewellery etc.), Ready-to-wear, Mercantile and Marketing, Couture, Photography, Journalism, Fashion shows and Choreography.

Mercantile and marketing, event planners, fashion journalists, fashion photographers and beauticians are the main stakeholders of this industry, alongside designers and customers. Models, actors and actresses and brides are the segment of people interested in this sector. It is highly challenging to estimate the size of the industry as presently, there are no proper professional associations or registration processes available.

In terms of government regulations, there is no specific policy governing the sector. Regulations applicable to the apparel industry are applicable to the fashion industry as well. high import duties and taxes hinder development of the industry to a greater extent, as demand is price elastic.

Opportunities

As an opportunity, there is a vast untapped global market if you could enter this market. Increasingly, if international brands come to Sri Lanka, it creates an opportunity to enter the global market.

Also, the Academy of Design (AOD) and University of Moratuwa (UOM) are the pioneers in fashion design education in the country, while several courses and diploma programmes have been initiated in the country recently. Most of these are provided by educational centers based in Colombo. However, the students enrolled for these courses come from every corner of the country.

Constraints

The Sri Lankan fashion market is quite small and there are few fashion retail shops available. Further, locals are not willing to spend much on fashion.

“Lot of people visit the shop and do fit ons, but after checking the price, they change their mind and ask us ‘Does this cost that much? They don’t know the fact that although some designs appear to take few minutes, it requires skills and much time to produce a finished garment.”

FGD participant – Fashion Design

“In the fashion design industry, you should have a personal style or model whose styles are repetitively followed by others. In Sri Lanka, there are no such models whom people will follow unlike the Bollywood style in India.”

FGD participant -Fashion Design

Another problem identified is the higher profitability to trade Chinese or Indian products rather than Sri Lankan products, as Sri Lankan products are costlier and do not carry brand value. Thus, marketing Sri Lankan products globally is a challenging task.

Presently, the government has neglected the promotion operations of top brands in Sri Lanka.

There is no clear policy or government guidelines relating to the fashion design industry, with only the Colombo fashion week operating. However, it does not promote the fashion industry as a whole in Sri Lanka.

Development Priorities

A key priority identified is to develop a 'design street' which is high on its design and the country's best design works should be displayed and traded here. Further, projects undertaken to develop the industry should be more result oriented rather than requiring /carrying out documentary work. Other suggested measures include: promoting and developing the sector in line with the tourism sector, improving infrastructure facilities and providing facilities and promoting foreign investments, reduction in tax and duty on raw materials for manufacturing clothes, creating a platform to perform in public space where the industry will be promoted rather than a single organisation or a group of people, giving priority to locals at the 'Colombo Fashion Week', and conducting ethical and effective fashion shows to promote the industry.

4.4.6 Software, Graphic Design, Gaming, Digital Creatives

Overview

IT designers create visual concepts, using computer software to communicate ideas which inspire, inform, and captivate consumers. They develop the overall layout and production design for various applications such as advertisements, brochures, magazines, and corporate reports. Regarding gaming, designing characters, levels, puzzles, art and animation are required. Game designers may also write code, using various computer programming languages and whereas in digital creative, designers use digital platforms to showcase their creativity.

People frequently tend to jump to the conclusion that creative industry is all about designing, advertising and marketing. However, this is not always true. If sectors like architecture, interior designing, etc., are selected, we can see that up to a certain extent, creativity is needed for these categories. When it comes to gaming, from beginning to the end, it is all about designing. If one character need to be guided to one specific place, then lights are used. For this, cinematic and photography knowledge are needed. To design the character, buildings and everything knowledge for graphic designing, architecture etc., will be used. Creative professionals are required to be almost multidisciplinary as much as possible, as creative professionals should have a broader understanding and capabilities beyond a certain extent. For example, though a physicist have knowledge on the physics stream, at times creative professionals are required to carry out designning for physicist too. In graphic designing, in terms of visual communication, we have to consider about various ways to reach the targeted group. Therefore, we need to study how peoples' mind work and thereafter, we need to apply creativity to reach to the point.

Basically, digital media is social media platforms and can be just like anything that uses technology; Facebook, Instagram, Twitter, LinkedIn, WhatsApp and YouTube.

Main stakeholders (content creation) in the sector are the Agencies / Brands and the Social media users. The main hierarchy that can be identified in this sector consists of Creative director, Assistant creative director, Team level heads, Art people and Plan people. Usually, agencies don't produce tv commercials internally. Rather, they use production houses for this purpose which consist of team players such as Art directors, Project managers and 3D animators. Thereafter, the production house and agency will finalise the product together. There is a vast number of freelancers in this sector and figures are not available.

Thus, the total contribution to the economy is also unknown. The IT graphic industry contributes significantly and can contribute more to the GDP. Though the industry has much potential, the issue is that it is undervalued. Creativity is one feature that cannot be computerised. Therefore, it's hard to evaluate this industry.

There is no specific professional association for graphic designers. However as mentioned by the respondents; "No degree or a diploma is required to perform as a designer or creator". Earlier there weren't any programmes in schools. Recently some basic programmes were introduced into the school curriculum. Regarding the policies and regulations, there are regulations for content restriction such as smoking and other prohibited activities. Instead, there are no such regulations. Clients have to deal with rules and regulations, which usually come with the brand.

"Once I did some work for Colombo Tobacco Corporation. They can't advertise cigarette and stuff. So, what they do is that they distribute all their marketing budget through sellers and internal programmes to educate sellers on how to how to improve sales etc"

FGD participant – IT sector

Ministry of Information and Communication Technology is the regulating body of the advertising and IT sector. There are IPRs relating to this sector. However, most of the participants were not aware of these rights.

Opportunities

University of Visual and Performing Arts, the UOM, Tertiary and Vocational Education Center, the University of Kelaniya (UOK) provide undergraduate degree programmes for graphic designers. The AOD and some other private institutions do also operate. Most of other private institutions are currently offering various educational and training programmes. Younger generation has an emerging trend to study IT and Software related subjects, as they are aware of the global opportunities of the field. Today the world has become a global village based on technology and IT, hence jobs are virtually based on IT.

Constraints

Government restrictions exist for money exchanging methods such as PayPal. Therefore, no way/mode to transfer money for a foreign client and o mechanism to get paid/receive payment. In addition, there is no protection for designed products. People copy our products and sell it like their own products. This is a global problem, but in Sri Lanka this is worse because we are not protected by laws. Law is imposed (law of intellectual property rights), but lack of awareness and enforcement remain as problems. People don't encourage children to select this stream as the occupation/career as they have ingrained in children's mindset that one can't earn more whereas low career prospects are available in this stream. There is no standard when people price our product. Clients used to undervalue our product. As freelancers, those who are involved in this industry don't have much knowledge about how to do pricing and handle related aspects. Clients are used to the habit of bargaining and reduce the price. Further, those who engaged in these work lack of appreciation from the society.

> *"There have been times that I have reported to work at 9.00 a.m. and left at 4.00 a.m. the following morning and gone home and come back to the agency at 8.00 a.m. the same morning. Still, I have been told that I'm doing not enough."*
>
> *FGD participant – IT sector*

Development Priorities

There should be laws to assure payments. Clients are in such a hurry to get their work done but when it comes to payment, they take their own time. Hence, there is nothing that those who are involved in this industry can do about it. Even though it comes under individual agreement, clients continue such practices. It is important to have a certificate of acknowledgement from the government, and in addition guidelines to sustain the standards of the industry. The need for a legal platform where freelancers could make complaints or request for legal or any other support is crucial. Most importantly, the turnaround time should be regulated. The overtime payments should be made mandatory is another suggestion in the sector.

4.4.7 Architecture, Interior Design and Industrial Design

Overview

In architecture or interior design, key stakeholders can be identified as the client and service provider who are referred to as the architect and interior designer. Both these fields consist of complex profiles which elaborated that architecture and interior designing are vast but mutually interconnected fields. Almost all historical civilisations were designed through their own architecture and culture. Day by day, these sectors develop according to the modern needs and wants. Both architecture and design consist of planning, designing and management. Modern architecture, Contemporary architecture, Organic architecture, Interior architecture, Landscape architecture, High-tech architecture, Futurist architecture and Constructive architecture are few of the areas of the architectural subsector. Interior designing is also an art which enhances the interior of buildings for an aesthetic appeal and a healthier environment. This subsector especially looks at the structural aspects of a building, the site planning, landscaping, furniture, and the architectural graphics as well as the interior details.

There are specific regulations for planning and constructions. Currently there is "Physical Development Plan" which is managed by the Urban Development Authority.

Opportunities

There are professional associations for both these sectors. These are, Sri Lanka Institute of Architects, Sri Lankan Institute of Interior Designers and Sri Lanka Institute of Landscape Architects.

Constraints

One of the main arguments that was highlighted in each and every discussion was the weaknesses in the Sri Lankan education system. Architecture and interior designing are fields where creativity is a must. However, the Sri Lankan education system does not create the path for making of a creative person at the end of the school or professional education. It just builds work oriented people.

> "*In Sri Lanka, the education system is not favourable for making of a creative person. If a person is to be creative, then he needs much time to think. But the current education system puts barriers into an encouraging creativity."*
>
> *"There is a problem regarding the quality of the education system. Some teachers who teach this subject don't know at least what architecture is?"*
>
> *FGD Respondent - Architecture sector*

Developing creativity needs time, hence a creative architecture or an interior designer needs more time to give thoughts and bring out a creation. Imagination is the most crucial part in these kinds of sectors. However, today all activities are profit oriented and money based. Many people assume that after following a basic diploma or similar, they can be qualified in these vast subjects. Such people are unaware of the basics and just earn a quick gain. Clients also need work at a rapid rate and they just go for these people.

> *"Current social and economic situation is not good for emerging of creative people. Because of time constraints, people copy ideas of another and develop their plan. This is not creativity. Today, we can see "coffee table" architects.*
>
> *KII Respondent*

In the past, our architecture was more professional and Sri Lankan architects had carried out foreign consultancies as well. Over the years, this condition has diluted and today, foreign architects rather come to Sri Lanka to impart knowledge to us.

In Sri Lanka, at times, the authorities do not materialise proper advantage from architects specially in town planning. For example, the Kadawatha town plan is without proper advice of architects.

Development Priorities

One of the main development priorities of the sector is the suggestion to include designing and architectural planning separately (partially) to the school syllabus. Currently, there are no proper subjects to measure creativity of students. Another suggestion is to give due recognition for people involved in these sectors"**.**

4.4.8 Advertising and Branding

Overview

Advertising and Branding are closely related subsectors with mutual interconnections. At times, it is not easy to demarcate these sectors, hence, studying about the sector in its entirety is more effective. Advertising sector is mainly related with marketing and media. Simply, it is the process of marketing of any brand through media.

Main stakeholders of advertising and branding are clients and agencies. The client always needs the assistance of an advertising body to market its product to a wider group of consumers, hence, the process needs more collaborative efforts. As such, this sector consists of strategic people, creative people, designers etc. Media agencies and creative agencies are the main parties which are involved in the advertising process. Media agencies primarily operate as a third party between a client who owns or handles a brand and the place where advertising occurs such as TV, Radio, press or digital. Media buying and media planning are always handled by media agencies who advise companies/ clients on how and where to advertise. Creative agencies are those who are mainly operating based on strategic and creative aspects. They offer a variety of services that fall under the umbrella of marketing and advertising.

In most of these agencies there are 4-5 different divisions (for well-structured entities).

1. Creative department – Finding the solution for business problems.
2. Service department - They are the people who act in between client and creative people.
3. Media department - Whatever the material that is received to the creative department will go through media department to see the way different mediums are used and implemented as various solutions.
4. General departments – Finance, HR, etc.

A person doesn't need a special qualification to be employed in this industry. Therefore, it can be identified as comparatively a "low barrier industry"**.** Stakeholders like production houses, photographers, printers, voice artists, graphic designers and other vendors are directly or indirectly involved in this sector. Therefore, it's an interdependent network of many people.

Regulations and policies do not affect directly on advertising agencies individually but it depends on the type of brands that are marketed by the agency. Nevertheless, there is no dedicated/specific body for regulating advertising standards in Sri Lanka. There are many media regulations specifically for advertising certain categories of goods/brands. For an example, in the beauty care industry, in terms of the medical concerns/regulations, the National Medicines Regulatory Authority plays a role in regulating the standards of cosmetics and related products. It is prohibited to advertise tobacco and liquor related products in media. Likewise, it is mandatory to obtain prior approval from relevant authorities for certain products, regarding respective policies and regulations applicable. Ultimately, whatever the advertising agencies create belong to the client.

However, the sector is governed under the Ministry of Mass Media and Information and Ministry of Digital Infrastructure and Information Technology – Digital Marketing.

Opportunities

Nowadays, there are specific advertising teams who handle main languages in the country itself. Then, the advertisement should not be translated into another language. Rather it can be produced in the same language by the same team. A talented creative person in the advertising industry can earn more than a typical medical doctor. Age or experience does not matter the most in this industry unlike in other industries; one can earn more if your contribution/work is accepted by the people who seek your services. Advertising industry is a skill-based industry and is not always based on educational qualifications.

Constraints

The industry or the sector generally flows with innovative ideas as branding is the key idea in every aspect. Advertising agencies often come up with new ideas and this makes clients to look forward to and expect competitive ideas from the agency. There is a considerable constraint in the digital media sector. Ethical issues are the main constraint related with the so-called industry. Occasionally, when the agency pitches an idea to the client, latter indicate their inability to afford to implement the idea. However, client will execute the same idea by themselves or through another agency, later, at a lower cost.

> *"Clients try to approach media companies for advertising rather than going through an advertising agency. In India, the same situation happened, so the advertising agencies decided to boycott any sort of advertising activities to those clients. Due to these, later, all clients decided that they will go through an advertising agency and not approach the media directly."*
>
> *KII Respondent*

Another constraint is lack of collective bargaining power of the industry. All companies try to operate as individual entities rather than collectively, and decide to form regulations and operating conditions. As most of the respondents elaborated, even though there are some networking associations, these aspects are not highlighted.

Constraints remain in the financial aspects as well. In digital marketing large sum of money flows directly to the Facebook social media platform. According to one of the KIIs, not having a physical office within the country to pay money is an issue. According to what this respondent suggests, it is important to have a sub office in Sri Lanka.

At the beginning, a person has to work hard for a low salary until he or she is identified as a person with novel and innovative ideas. Therefore, many young people leave the industry at the initial stage.

> "As it is a connected industry, the well- being of the industry depends on how well the other conventional industries do. Once the country is vibrant, then market is vibrant; Then the consumer landscape is vibrant which means the advertising industry as a whole is also vibrant. The survival of the industry depends on the expendable income (i.e. disposable income) of the people. In an economic decline, marketing expense is the first to cut down which is a wrong decision"
>
> *KII Respondent*

Industry lacks rural talented people who have more innovative ideas with an understanding about the culture and people. People are needed within/from locally to communicate more effectively with the industry. Since there is a wider rural population in Sri Lanka, this would be possible

Higher charges from media for commercials is another issue with the sector, which is hindering the chance of a local produce to be marketed. All multinationals and so-called big brands through millions of money to brand their products, while the local producer cannot compete with them. Before the era of the war, the advertising industry performed well as opposed to now.

> "Multinational companies are able to buy Rs 300,000 commercial spots for Rs 75,000 due to their contract size and bargaining power whereas small to medium enterprises do not have this bargaining power and must pay the full price of Rs 300,000 for the same commercial spot."
>
> *KII Respondents*

Currently in Sri Lanka, among the many advertising agencies that are in operation concentrate mainly in the Western province, Colombo, while some of these are multinationals. JWT, Leo Burnett, DENTSUGRANT, MULLENLOWE, Magic Mango, Triad, Ogilvy, Seven Media group and GroupM media are some of the leading advertising agencies in Sri Lanka. Approximately there are about 150-200 players in this sector.

Advertising agencies always have interconnections and collaborations with other sectors such as Event Management companies, Film Directors, Actors, Models, Singers etc. They sometimes closely deal with foreign advertising companies. In some instances, when there are digital based activities, advertising companies have to connect with digital agencies and film production companies to create a TV commercial and also with another larger agency for related projects such Sri Lanka Tourism, Sri Lanka Airlines etc. As mentioned by many key stakeholders in the advertising sector, collaboration is a necessity and is a daily task with customers and people. The Accredited Advertising Agencies Association (4A) is the professional association, a collective body that promote industrywide collaboration. It is directly involved in many activities related to the advertising sector which represents advertising and marketing communications practitioners, agencies and related businesses in Sri Lanka. Approximately 47 of the companies have been registered in 4A's. The IAA (International Advertising Association) is one of the associations involved in this sector.

Few award ceremonies target advertising, media and marketing. An advertising festival where workshops, competitions were organised in the name of "chilies" conducted by the 4A's initiated around the year 2006. It was held for 4-5 years but has ceased. Now, a programme called "green chilies" is taking place. "Effie Sri Lanka", run by the Sri Lanka Institute of Marketing (SLIM) is held annually which honours effective marketing communications across Sri Lanka.

Development Priorities

Collective bargaining need to be developed within the sector, as most of the agencies are trying to work as individual entities which generates inefficiency. Collaborations within the industry is crucial, otherwise it is difficult to go ahead for continuation of the industry.

Professional associations must be involved in important decision making pertaining to the sector. All the agencies should collectively discuss their issues via these professional bodies and issues should be raised in such a way, other than raising them individually.

Appendix 2 provides a brief description of three related subsectors namely; beauty culture, culinary art and ayurveda.

5. Conclusions and Recommendations

Chapter five of the report mainly focuses on the key findings and recommendations. These recommendations are based on the key findings of the specific sector, survey data and secondary data analysis. Further, this section highlights the possible strategies or the recommendations that can promote sector development.

5.1 Matrix Analysis on Identified Constraints and Proposed Suggestions

Table 9 highlights the identified constraints and suggestions proposed by the stakeholders for each subsector development.

Table 9: Matrix Analysis – Identified Constraints and Proposed Suggestions for Each Subsector

Sector	Constraints	Suggestions
Craft	• Difficulty in finding raw-materials – Ex: For beeralu and Laksha manufacturing • Difficulty in finding markets • Lack of proper financial mechanisms for small and medium entrepreneurs – Difficulty in obtaining loans, especially those that are interest-free or have low interest rates • Corruption due to political intervention • Lack of technology transferring • No proper mechanism for small producers to enter the export market • Lack of free training opportunities • Declining interest of the younger generation towards the sector	• Introduce a proper mechanism to find and distribute raw materials • Generating income through product diversification • Introduce new technology • Improve social recognition and create awareness programmes • Expand government training facilities and introduce public –private partnerships
Fashion Design	• Small market and an inadequate number of fashion retail shops. • High costs of Sri Lankan products and absence of brand value; it's more profitable to trade Chinese or Indian products • Inability to compete with prices offered by India and China. • Challenges in marketing Sri Lankan products to the world market Insufficient number of popular brands in Sri Lanka. • Unwillingness of Sri Lankan consumers to spend significantly on fashion Lack of promotion of the fashion industry in Sri Lanka, for example via the Colombo Fashion Week • No clear direction a vision in the industry or government about the industry.	• Make and develop an area as a 'design street' or 'design district' where all the shops in the area could showcase their designs where anyone in the country or tourists can go and purchase a variety of designs. • Reduction in tax and duty for raw materials for manufacturing. • Establish a platform to perform in public space where the industry will be promoted, rather than a single organisation or group of people. • Given priority to locals in the Colombo Fashion Week.

Architecture & Interior Design	• Sri Lanka's education system is not conducive for creating creative persons. It does not allow space for thinking and imposes barriers to creativity. The education system is also of poor quality in terms of subject matter. For instance, "some teachers who teach this subject don't even know what architecture is. • The current social and economic situation is not good for emerging creative people, where time constraints for instance induce professionals to borrow others' ideas and develop their own, which is not creativity. Also, today we can see "coffee table" architects who do things very easily. • Sri Lanka doesn't realise full potential from architects and their knowledge. For example, the Kadawatha town was planned without obtaining advice of architects.	• Build stronger connections via institutions to develop better through connections. • Revise school syllabus to encourage and nurture creativity. • Give a good place and recognition for domestic architects and prevent the current trend where foreign architects come to the county to train local ones. • Increase responsibilities of the Ministry of Finance with regard to sector development.
Photography	• The industry lacks professionalism compared to other countries, due to the absence of a professional regulatory body with established criteria to enter the photography field, and hence, flooding of poorly trained and qualified photographers in Sri Lanka. • Lack of creativity, given the adoption of the profession based on mere convenience as opposed to talent or interest, and the use of technology as a substitute for true creativity. • Lack of an accredited academy to administer quality educational programmes in the field • High competition from Indian companies. • High cost of photography-related equipment Low number of technicians, especially those trained in digital skills, leading to problems with regard to repair and maintenance. • Limited number of photographic exhibitions taking place in the country, and insufficient opportunities for Sri Lankan photographers to showcase their work, lack of copyrights of photographs, where newspapers and magazines use a photograph without permission. • Lack of 'stock photography' in the country, or libraries with stored collections of photographs, which makes it difficult to meet demand in a timely fashion for photographs. • Lack of government recognition of talented photographers, and lack of support and funding to attend international photography exhibitions and fairs.	• Establish a regulation body to monitor professionalism and ethical behaviour in the industry. • Establish a proper academy offering well-structured high-quality photography education and training courses. • Restrict Indian competition in the local market. • Encourage the domestic manufacturing of photography related equipment and software. • Lower tax for equipment. • Increased government recognition and funding to attend international shows, including assistance in obtaining visas Publish more photography magazines.

Publishing and Literature	• Lack of ethics and professionalism in the industry, and the inability to detect plagiarism and other similar offences Absence of strict standards for translations of original work. • Lack of standards for editing pieces of work and a shortage of skilled and competent editors, lack of creative writing programmes and creative writing disciplines at the university level, poor content quality, paper quality and cover page quality of books, make it difficult to sell books at a competitive price and low recognition for Sri Lankan books. • Lack of support and assistance to attend international book fairs, neglect and lack of support to smaller publishers as well as Sri Lankan authors. The English novel readership is very low compared to that of the Sinhala, and a vibrant culture of constructive criticism and reviews is lacking in the English publishing circle. • Unlike printing, publishing has not been identified as an industry in Sri Lanka, which becomes an issue in obtaining loans.	• Foster and cultivate the habit of reading and writing in children from an early age • Standards should be set for editing, including paper design and layout, as well as stringer regulations to identify plagiarism and related offenses, with strict penalties being enforced in such cases. • More writing and editing workshops and opportunities for writers to hone their craft boost the English novel readership.
Advertising & Branding	• Sometimes when you pitch an idea to the client, they say can't afford to implement the idea but later, they will execute the same idea by themselves. • Clients trying to go to media for advertising rather than going through an advertising agency. • No collective bargaining power for the industry so lack of regulation and poor working conditions, where all companies act individually and not collectively as an industry. • Continuation of advertising festivals, workshops and award shows conducted by 4A's and SLIM in the mid-2000s, which were instrumental in recognizing and promoting creative work done in advertising.	• Promote the industry outside Colombo via advertising festivals and competitions.

	• Establish a Facebook office in Sri Lanka to prevent the outflow of large amounts of funds in digital marketing. • Lack of awareness of the industry to to problems in the education system. • Lack of diversity in the workforce, with a majority from Colombo. Poor starting salaries make it difficult to manage expenses, especially if your hometown is out of Colombo. • Poor economic conditions are a threat to the survival of the industry, which depends on the expendable income of the people. When economy is in depression, the first thing they cut down is the marketing expense. • The industry needs more rural talent because it's about understanding culture and people. As Sri Lanka is a more rural populated country, people from such areas are key to communicate more effectively. • Lack of awareness about the industry in Sri Lankan people. • Exorbitantly high media charges for commercials makes it unaffordable for new Sri Lankan products to bare the budget for advertising as international companies.	
Digital Media & Graphic Designing	• Lack of recognition of work performed. • Lack of Incentives, grants, exhibitions to encourage people in this industry. • Lack of labour rights, no pay for overtime, low flexibility with regard to leave, long working hours. • Lack of employer concern about the health and safety of the employees (continuous work for 2-3 days without sleep, late off time in nights).	• Standards should be in place and clients should be aware of the industry. • A separate body should be looking after this industry's labour rights due to the uniqueness of the industry.

Performing and Visual Arts	• Lack of social recognition. • Lack of coordination among government institutes. • Lack of awareness. • Lack of available infrastructure facilities • Lack of properly qualified teachers at school level.	• Establishment of guidelines or standards for the recognition of individuals who are employed in visual & performing arts. • Standardizing payments for artists. • Connecting rural artists with main institutes. • Improve infrastructure facilities, starting with building a theatre and a gallery in each province. • Government support in preserving artists as a national asset and providing them with due recognition.

Source: Author observations.

Finally, few specific recommendations and strategies were selected as main recommendations of the study to promote sector development. As highlighted in the report, it is important to note that only creative goods and services exports contributed to 1.06 % of the GDP of the country in 2014. Where, only 4.6% of respondents to our survey were exporting, meaning this 1.06% GDP contribution is an underestimate that does not account for the domestic circulation. Further, 3% of the economically active workforce are involved in the creative industries. Moreover, it is a good source to improve female labour participation in the country as some subsectors are led by female labour. Some of the selected recommendations are as follows;

It is utmost important to increase awareness of the sector and also provide due recognition to people who are engaged in the creative industry. As stated in the report, general public is not aware on creative industry's contribution to Sri Lankan economy and employment. Further, lack of recognition for some traditional creative jobs discourage people to continue by contributing and remaining in the industry in the long run. Thus, the likelihood to dropout is somewhat high. There are some programmes implemented by the government and also the industry to support some subsectors. However, all subsectors are not considered. Thus, it is important from the point of view of the general public too to protect and value the creative and culture industries in Sri Lanka. Moreover, there should be awareness programmes on the importance of the sector, emerging creative industries, creative jobs, economic and social value of the sector etc. Additionally, creative people or the employees should be recognised as a separate category where their hidden contribution to the national economy should be appreciated.

It is necessary to develop a strong professional association to support the industry. This association needs to have authorities to monitor ethical behavior and the professionalism in the industry, maintain a registry of creative industry and creative people, creating a common platform for rural and urban creative people to perform, organise and conduct award ceremonies, implement an insurances scheme for creative people etc. This association could be akin with '*UK DCMS*' where it promotes culture and artistic heritage of UK and support business or '*Creative Scotland*' where it supports the arts, screen and creative industries in Scotland by helping those who are involved in the sector to develop ideas and bring them to life.

It is useful to create a proper and strong link between government and the industry. The above mentioned association could link the government and the creative industry in a more appropriate manner. Even though there are several programmes conducted by the government to support and encourage business activities, people are not aware of these. Some of the programmes have not reached beyond to the grass-root level. It is important to highlight that there are some similar programmes which are conducted by different institutions for the same group. However, there is no proper monitoring or evaluation processes. On an unfavoruable note, some programmes have impaired in terms of quality, ceased to function, changed etc., with change in governments. There is inconsistency among these programmes. Thus, it is important to have a proper link between the government and industry institutes when implementing sector specific programmes.

It is important to arrange proper supply chain mechanisms which ultimately cater to global value chains. Products which are produced by the creative sector employees should be a part of bigger value chains in the world. Local creative industry sector struggle to tap into global market even though they may have the capacity to cater to foreign demands. Connections to global value chains need to be made easier to access and streamlined. It is important that the aforesaid association or the government could get involved in the product diversification process by appointing local and foreign expertise to each sector. They should have the potential to advice the sector about the current trends and possible diversifications that could be done to enhance the product market locally or globally.

During this research it is highlighted that there is lack of data on creative industry sector in Sri Lanka. Thus, it is important that the Ministry of Industry and Commerce includes Creative Industries as one such industry for their next survey which will provide national figures on output value, output quantity, production capacity, sales value & sales quantity by export and local, value of local & imported raw materials used, wages, no of employees etc. on creative industry sector.

Moreover, it is needed to improve and expand existing infrastructure facilities which are relevant to the industry. For an example, it is vital to improve facilities in public spaces for performances, training centers in provincial and divisional levels, theatres, galleries etc. These improvements could be carried out, both with the support of the government and the industry. Also, it is important to upgrade the existing training centers with new technology and support the industry to foster innovations.

It is crucial to promote and expand the industry outside the main cities. Further, it is important to connect rural creative people with the main institutes and support to improve their creative business. This could be done through advertising festivals, award ceremonies, inviting local schools to participate festivals, competitions etc. Knowledge and skills with regards to the creative sectors should be ingrained in the minds of the young enhanced, and begin from the school-level. Art, culture, heritage and all other creative work should be taught in a way that the child could subsequently be employed in a professional occupation that offers a secure livelihood. Moreover, it is highly appropriate to promote emerging creative industries in rural areas as well.

Further, it is important to strengthen the knowledge on access to IPRs amongst the creative industry people. And also, it is important to conduct awareness programmes on IPRs at the grassroot levels. Additionally, at the national level it is important to adopt sui generis legal framework for protecting traditional knowledge and traditional cultural expressions, which are ultimately the foundation from which Sri Lanka creates its unique designs.

To effectively implement many of these recommendations, it is crucial to have a strong professional association for the creative industry sector. This would undoubtedly provide a better targeted support and service for the creative industry sector and as also will help many creative entrepreneurs, employees and freelancers to further develop their businesses activities with emerging technology and innovations.

In conclusion, it is evident that there is a huge opportunity for creative people in the country considering the significant contribution by the creative industry sector to the country's economy. In addition, by employment generation and empowering the women labour force participation through creative business activities. Thus, it is important to establish Sri Lanka as a decent and sustainable creative hub which will be positioning the country as a standout leading creative production hub within South Asia, and competing with East Asia.

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Annexures

Annex 1: Creative Industries Classifications

Examples for creative industry classification. In German classification, which is compatible with the British concept of creative industries, defines cultural and creative industries as those comprising "of all cultural and creative enterprises that are mainly market-oriented and deal with the creation, production, distribution and/or dissemination through the media of cultural/creative goods and services."[16] 11 core branches or market segments have been identified as belonging to the economic field of culture and creative industries:

- Music industry
- Book market
- Art market
- Film industry
- Broadcasting industry
- Performing arts market
- Design industry
- Architectural market
- Press market
- Advertising market and the
- Software and games industry

All cultural and creative activity is governed by the creative act - "Schöpferischer Akt" – which constitutes all the artistic, literary, cultural, musical, architectural or creative content, works, products, productions or services that form the relevant core of the eleven core branches.[17]

Other Western countries and regions including **Australia, New Zealand and Scandinavia**, have also adopted similar definitions, while differing in some aspects. Sweden, for instance, refers to the 'experience economy', which, in addition to the creative industries, also takes into account the restaurant business.[18]

In China, creative industries are considered part of the cultural industry. A cultural industries strategy was formulated in 2001 for the 10th Five-Year Plan, while the state established a Cultural Research Group in 2003, and classified the cultural industry into three

16 Federal Ministry of Economics and Technology. (2009). *Culture and creative industries in Germany*, Research Report No 577. Berlin, Germany: Federal Ministry of Economics and Technology.

17 *Ibid.*

18 British Council. (2010). *Mapping the creative industries: A toolkit*. London, United Kingdom: The British Council.

broad areas: 1) press, media and publishing; 2) TV, film and radio; and 3) the arts.[19] The policy concept of "creative industries" was introduced in 2004 in cities such as Beijing, Shanghai, Shenzen and Guangzhao, and later extended to Chongqing, Nanjing, Qingdao and Tianjin under the Eleventh Five-Year Plan in 2006.[20] The system was further reformed in 2011 to promote and develop the creative and cultural industries as a fundamental and competitive component of the national economy by 2020. A more recent classification considers the same creative subsectors as that of the UK, classified into three sections as follows:

- Arts (art, antiques, performing arts, music and photography)
- Media (publishing, film, television and radio)
- Design consultancy (product design, architecture, fashion, software, video games and advertising)

Over the last decade the Chinese cultural industry has grown by 60 times, reaching almost 4% of GDP and influencing other sectors.[21] Technological advances have had a key influence on consumption and access of creative content via the internet, while financial capital has become increasingly involved in supporting the industry. Sectors including advertising, crafts, design communication and video production are primarily reliant on domestic companies, whereas collaborations between Chinese companies and foreign companies are seen in sectors such as architecture, product design, music, film and television.

The *Dasar Industri Kreatif Negara* (DIKN, National Creative Industry Policy) issued in 2009 consists of the creative industries policy of the **Malaysian** government. This document also draws on the UK's DCMS definition, and identifies 14 subsectors, divided into three categories: Creative Multimedia, Creative Cultural Arts, and Creative Cultural Heritage (see Table xx).[22] The DIKN pays particular emphasis on digital media, including multimedia, innovation, knowledge economy and technology, while also focusing on the nation-building role of the creative industries and its potential to help nurture harmony and social cohesion.[23] The Malaysian government has also identified 10 corresponding 'creative pillars': visual arts, performing arts, music, literature, content creation, fashion, traditional and cultural arts, culinary arts, design, and creative education.

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19 Manso, L.A. (2014). *Culture and creative industries in China*, EU SME Centre.

20 United Nations Development Programme. (2013). *Creative economy report* 2013: *Widening local development pathways*. Paris, France: United Nations Development Programme.

21 Manso, L.A. (2014). *Culture and creative industries in China*, EU SME Centre.

22 Barker, T., & Beng, L.Y. (2017). Making creative industries policy: The Malaysian case. *Kajian Malaysia*, *35*(2), 21–37.

23 *Ibid.*

Creative industry subsectors in Malaysia

Multimedia Creative Industries	Cultural Arts Creative Industries	Cultural Heritage Creative Industries
Film and TV Advertising Design Animation and Digital Content	Crafts Visual arts Music Performing Arts Creative Writing Fashion and Textiles	Museum Archives Restoration Preservation

Source: Barker, T., & Beng, L.Y. (2017). Making creative industries policy: The Malaysian case. *Kajian Malaysia*, *35*(2), 21–37.

India's creative industry featured in policy documents for the first time in 2006, with policy documents of the Planning Commission of the Government of India beginning to use the classic British definition of the creative industries in several of its strategy documents. Its initial focus was on the traditional arts and crafts sector, as opposed to more technology-intensive sectors. With the rapid growth of the film and related industries in more recent years – with the third largest television market in the world and a film industry that produces over 800 films annually –, the emphasis has shifted to multimedia related industries. India's scope also includes lifestyle products and services, like yoga and Ayurvedic medicine, in addition to the standard subsectors.

Classification Models of Creative Industries

With the main objective of providing the conceptual and policy framework for understanding the creative economy from a global perspective, taking into account views and definitions from multiple countries and regions, the UNCTAD published its first report on the creative industries in 2008. The UNCTAD (2008) argues that the concept of creativity goes beyond activities involving artistic components to "any economic activity producing symbolic products with a heavy reliance on intellectual property and for as wide a market as possible".[24] UNCTAD makes a distinction between "upstream activities" (traditional cultural activities such as performing arts or visual arts) and "downstream activities" (advertising, publishing or media-related activities that are closer to the market). Accordingly, the UNCTAD classification of creative industries is divided into four broad groups:

24 United Nations Development Programme. (2013). *Creative Economy Report* 2013: *Widening Local Development Pathways*. Paris: United Nations Development Programme.

1. *Heritage*

This group argues that heritage unites cultural aspects from the historical, anthropological, ethnic, aesthetic and societal dimensions, and is the origin of a number of heritage goods and services as well as cultural activities. The concept of "traditional knowledge and cultural expressions" is part and parcel of the creation of arts and crafts as well as folktales, legends and traditional cultural celebrations. This group is therefore divided into two subgroups:

- Traditional cultural expressions: arts and crafts, festivals and celebrations
- Cultural sites: archaeological sites, museums, libraries, and exhibitions

2. *Arts*

This group refers to creative industries solely based on art and culture, which is in turn inspired and influenced by heritage, identity values, and symbolic meaning. This group is also divided into two subgroups:

- Visual arts: painting, sculpture, photography, and antiques
- Performing arts: live music, theatre, dance, opera, circus, puppetry

3. *Media*

This group refers to media that produce creative content with the purpose of communicating with large audiences. Main subcomponents are:

- Publishing and printed media: books, press and other publications
- Audiovisuals: film, television, radio and other broadcasting

4. *Functional creations*

This group includes more demand-driven and services-oriented industries, engaged in creating goods and services with 'functional' purposes. It is divided into the following subgroups:

- Design: interior, graphic, fashion, jewellery, toys
- New media: software, video games, and digitalised creative content
- Creative services: architectural, advertising, cultural and recreational, creative research and development (R&D), digital and other related creative services

The UNCTAD further goes on to define the creative industries as follows:

- The cycles of creation, production and distribution of goods and services that use creativity and intellectual capital as primary inputs;
- Constitute a set of knowledge-based activities, focused on but not limited to arts, potentially generating revenues from trade and intellectual property rights;
- Comprise tangible products and intangible intellectual or artistic services with creative content, economic value and market objectives;

- Are at the cross-road among the artisan, services and industrial sectors;
- constitute a new dynamic sector in world trade

The Report, however, also acknowledges that there is no simple definition of creativity that encompasses all the various dimensions of this broad concept, and presents four specific sets of models of classification systems. Underpinning each model is a specific rationale based on underlying assumptions about the purpose and mode of operation of the industries, which are classified into "core" and "peripheral". Table xx below describes the four models.

Classification Systems for The Creative Industries According to Different Models

<table>
<tr><th>UK DCMS Model</th><th>Symbolic Texts Model</th><th>Concentric Circles Model</th><th>WIPO Copyright Model</th></tr>
<tr><td colspan="4">Scope/definition</td></tr>
<tr><td>Defines CIs as those requiring creativity, skill and talent, with potential for wealth and job creation through the exploitation of their intellectual property</td><td>Focuses attention on popular culture. The processes by which the culture of a society is formed and transmitted are portrayed in this model via the industrial production, dissemination and consumption of symbolic texts or messages, which are conveyed by means of various media such as film, broadcasting and the press.</td><td>Based on the proposition that the cultural value of cultural goods gives industries their most distinguishing characteristic. Asserts that creative ideas originate in the core creative arts in the form of sound, text and image and that these ideas and influences diffuse outwards through a series of layers or "concentric circles", with the proportion of cultural to commercial content decreasing as one moves further outwards from the centre</td><td>Based on industries involved directly or indirectly in the creation, manufacture, production, broadcast and distribution of copyrighted works</td></tr>
<tr><td colspan="4">Subsectors</td></tr>
<tr><td></td><td>Core Cultural Industries</td><td>Core Creative Arts</td><td>Core Copyright Industries</td></tr>
<tr><td rowspan="5">Advertising
Architecture
Art and antiques market
Crafts
Design
Fashion
Film and video
Music
Performing arts
Publishing</td><td rowspan="3">Advertising
Film
Internet
Music
Publishing
Television and radio
Video and computer games</td><td>Literature
Music
Performing arts
Visual arts</td><td rowspan="5">Advertising
Collecting societies
Film and video
Music
Performing arts
Publishing
Software
Television and radio
Visual and graphic art</td></tr>
<tr><td>Other Core Cultural Industries</td></tr>
<tr><td>Film
Museums and industries</td></tr>
<tr><td>Peripheral Cultural Industries</td><td>Wider Cultural Industries</td></tr>
<tr><td>Creative arts</td><td>Heritage services</td></tr>
</table>

Software Television and radio Video and computer games	**Borderline Cultural Industries** Consumer electronics Fashion Software Sport	Publishing Sound recording Television and video Video and computer games **Related Industries** Advertising Architecture Design Fashion	**Interdependent Copyright Industries** Blank recording material Consumer electronics Musical instruments Paper Photocopiers, photographic equipment **Partial Copyright industries** Architecture Clothing, footwear Design Fashion Household goods Toys

Source: United Nations Development Programme. (2013). *Creative Economy Report* 2013: *Widening Local Development Pathways*. Paris: United Nations Development Programme.

In a more recent report, the United Nations Development Programme (UNDP,2013) identifies two additional models as part of the classification system:

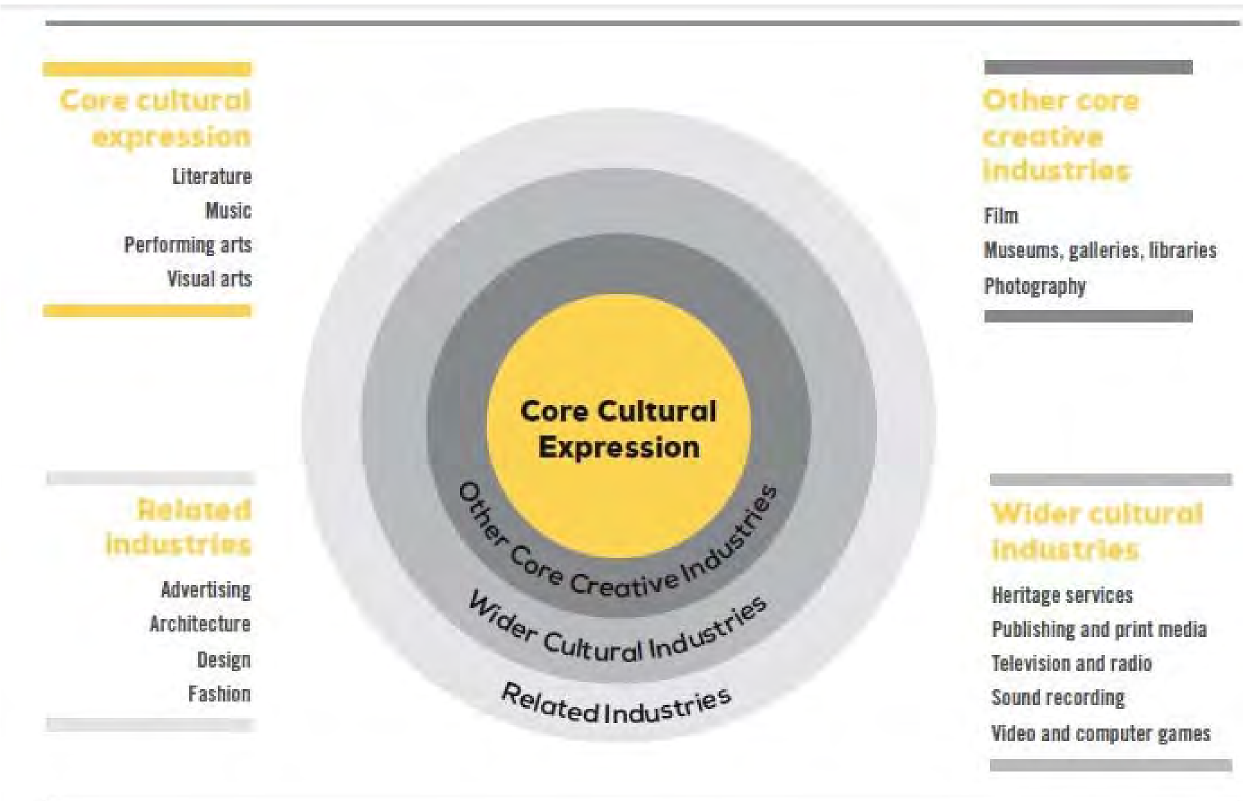
Additional Classification Models for Creative Industries

UNESCO Institute for Statistics Model	**Americans for the Arts Model**
Industries in Core Cultural Domains Museums, galleries, libraries Performing arts Festivals Visual arts, crafts Design Publishing Television, radio Film and video Photography Interactive media **Industries in Expanded Cultural Domains** Musical instruments Sound equipment Architecture Advertising Printing equipment Software Audiovisual hardware	Architecture Advertising Arts schools and services Design Film Museums, zoos Music Performing arts Publishing Television and radio Visual arts

Source: United Nations Development Programme. (2013). *Creative Economy Report* 2013: *Widening Local Development Pathways*. Paris: United Nations Development Programme.

The cultural and creative industries have also been captured in various "concentric circles" diagrams. A well-known and early model is that of David Throsby, which is illustrated below. This diagram does not imply that individual artists occupy the apex of the hierarchy of creativity. Rather, it indicates the start of the cultural value chain, where individual artists and creative workers often belong to a broader enterprise whose process is initiated and monitored by managers, entrepreneurs, producers, and intermediaries etc., who in turn rely on the wider community. Creativity and cultural expression are thus a social process; hence the term 'core cultural expression' at the central core of the diagram.

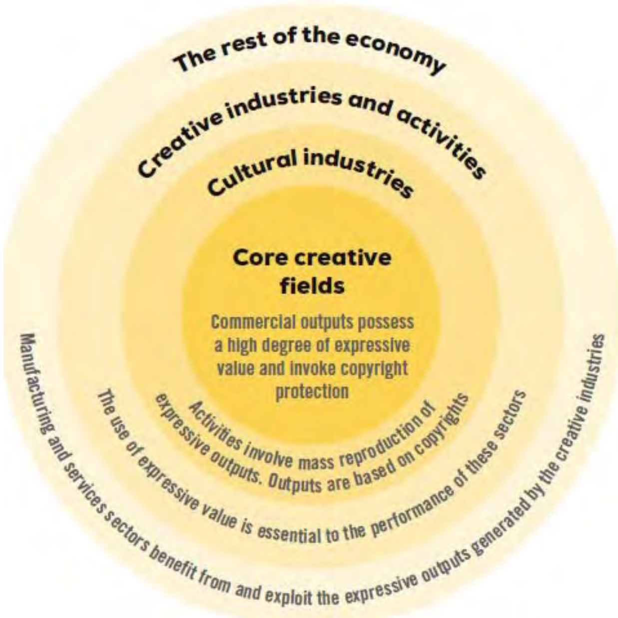
Modelling the Cultural and Creative Industries: Concentric Circles Model



Source: Throsby, D. (2001, 2008), cited in United Nations Development Programme. (2013). *Creative Economy Report* 2013: *Widening Local Development Pathways*. Paris: United Nations Development Programme.

A more recent concentric circles model proposed by the Work Foundation of the UK places 'expressive value' at the core, which includes varying elements such as aesthetic, social, spiritual, historical, symbolic, and authenticity values. This model also distinguishes between the cultural and creative industries, and captures the connection between creative expression and Intellectual Property (IP)/copyright.

The Work Foundation's Concentric Circles Model



Source: Work Foundation. (2007: 103), cited in United Nations Development Programme. (2013). *Creative Economy Report* 2013: *Widening Local Development Pathways*. Paris: United Nations Development Programme.

A subsequent UNCTAD Report assessing past and present trends in the global creative economy, makes a clear distinction between creative goods and creative services. Trade in creative goods is measured using the 'Harmonised System' for the classification of products, and places all creative good products under the following subcategories:

- Art crafts
- Audiovisuals
- Design
- Digital fabrication
- New media
- Performing arts
- Publishing
- Visual arts

Trade in creative services is measured using the Balance of Payments Manual, with the following being identified as covering creative services or those with a significant creative component:

- Advertising, market research and public opinion services
- Architectural, engineering and other technical services
- Research and development services
- Personal, cultural and recreational services
- Audiovisual and related services

Annex 2: Related Subsectors

Beauty Culture

There are around 43,000 salons operational throughout the country. However, this number changes regularly given that there are no strict regulations to enter the industry, making it difficult to give an exact estimate.

Beauty culture related education is primarily provided via Technical and Vocational Education (TVET) offered by the government, under the National Vocational Qualifications (NVQ) framework, a system developed by TVEC providing a structured seven levels of qualifications from Level 1 to Level 7, with different levels of courses such as certificate, diploma and degree at each level. The highest level – Level 7 – is equivalent to a Bachelor's degree. A Qualification consists of a set of competency units to suit requirements in a particular position in the labour market. Additionally, the Ministry of Education, as well as several private TVET providers, operate non-formal vocational education programmes targeting school drop-outs and adults with incomplete school education, in a wide range of fields including beauty culture. Several issues exist with regard to NVQ training, however, as discussed in subsequent sections.

Currently there is no ministry responsible for the beauty culture industry, which is a key reason behind the many implementation hurdles encountered. The industry currently comes under the TVEC. As such, the industry lacks a strategic plan for development. There are also many problems inherent in educational programmes delivered under the TVEC NVQ system. The skills standards of education of hair and beauty care is not streamlined to the desired standards recognised internationally. The knowledge of teachers is very poor, with no standards maintained. There is no common syllabus to be followed, no proper theory books developed to teach course material, nor standards developed for practical exams such as haircuts or other procedures. Many NVQ recruitments also appear to occur via political connections, rather than being merit based.

Another key constraint identified is the absence of government regulation of products being brought into the country. At present, various types of products are imported to the country, including those that are manufactured using harmful substances. Social media is used heavily to influence buyers, with there being no checks and balances in terms of advertising. As one respondent put it:

The government should introduce strict controls for the media as well as for cosmetic agents importing products from abroad. Regulation can be enforced by the Drug and Cosmetic Authority.

Also important is to impose laws and strict penalties on harmful cosmetic and other beauty product sellers. Punishments should be enforced for those who broadcast false information in addition to those who manufacture harmful beauty products.

Ayurveda

Ayurveda can be mainly divided into three sections: whole body medicine, Demonology and antivenin. These three sections can again be categorised, as Whole-Body medicine, Demonology and Antivenin.

There are only three to four companies who do Ayurveda related business in large scale in the country. The registration of Ayurvedic physicians falls under two broad categories (1). Registration of physician who possess medical qualifications, laid down in the Act or recognised by the Ayurvedic Medical Council (2). Registration of paramparika (traditional) physicians. In order to give an opportunity to physicians who have had no institutional training this scheme of registration was initiated in 1956. The facility is still available.

Ministry of Health, Nutrition and indigenous Medicine is the responsible ministry and this has a separate department for Ayurveda to handle Sri Lankan Ayurveda sector. In terms of government regulations, The Ayurveda Act No. 31 of 1961 provides that only a registered Ayurveda practitioner is entitled to use the title "Vaidyacharya" (Physician) and only such a practitioner is legally or duly qualified to practice as an Ayurvedic practitioner. According to the Ayurvedic Pharmacies Regulation 21 (I) "every formulae for the preparation of any drugs to be sold to the public shall be first approved by the Formulae Committee set up for purpose and any alteration or addition after the approval also should get approval." Though there are acts to regulate the industry, there is a serious dearth for policies which encourage the production and attract customers.

Few constraints of the sector can be identified such as, Products of multinational agencies' in local market are a huge problem for the local Ayurveda products, Lack of raw materials produced in the country. No proper policy towards cultivation of medicinal plants, hence some of the herbs cannot be cultivated due to legal barriers, R&D facilities are very low in the country. Low government intervention in the sector, Formulation of drugs using non-indigenous herbs is not easy due to phytosanitary restrictions, Lack of proper functioning educational programmes, Storage of Ayurveda medicine is difficult due to lack of sophisticated storage facilities.

One of the main opportunities of the sector is, recently an Ethics review committee is formulated and this will help researchers to develop their drugs.

A key priority identified is to promote Sri Lankan Ayurveda sector with tourism industry where tourists can experience Ayurvedic treatment and a way for Sri Lankan Ayurvedic products to get into international market.

Culinary arts

Providing an estimate of the numbers employed in the culinary arts sector is similarly challenging due to the same reasons. According to the SLTDA, the hotel sector directly employed 169,003 persons in 2018, of which 81 per cent were employed in hotels and restaurants. It also provided indirect employment to a further 219,484 individuals. FGD participants opine that there are several thousands of employees attached to the fast-growing café and bakery industries. Subsequently, the sector contribution to the country’s GDP is also massive, with the tourism sector alone contributing to around 5 per cent of GDP in 2018.[25]

The Ceylon Hotel School, also known as the Sri Lanka Institute of Tourism and Hotel Management (SLITHM), is the only government-approved institute, established in 1964 to train individuals in the hospitality industry. Provincial schools have been set up in Anuradhapura, Bandarawela, Pallekelle, Koggala, Ratnapura, Kurunegala, and Pasikudah to accommodate students across the island. Education and training at the Institute consists of four main courses, with students graduating with either diplomas or degrees depending on the number of courses offered. Additionally, other hotel schools, such as the Swiss Lanka Hotel School and the Colombo International Hotel School, both located in Colombo, also offer education and training in culinary arts.

In terms of creative industry policy, loan schemes are available for financing women entrepreneurs and SMEs. Digital systems maintained by hotels are examples of efforts to foster innovation and digital transition. Government support is however lacking in terms of fostering industry-government collaboration and providing training to attend international trade fairs.

A key constraint in this sector is that, the absence of a clearly specified set of guidelines to open and maintain establishments. All processes and licensing requirements are ad-hoc, and there is no institute where all information or documentation can be obtained from. As a result, the whole process is very inefficient, where it could take up to six months to obtain a license. Similarly, there is no consistency or strategic plan with respect to inspections carried out by public health inspectors (PHIs). At present, they come on random visits to inspect restaurants and cafes, and in the absence of specified requirements, agree to turn a blind eye on potential problems in exchange for bribes.

The '*Hela Bojun'* initiative is another important opportunity for Sri Lankan culinary artists. Funded by the Ministry if Agriculture, these consist of open kitchens, serving typically Sri Lankan food at subsidised prices, spread across the country. The two objectives under which *Hela Bojun* was founded – promoting local produce and empowering women – have been met with considerable success so far. Local food sale outlets have provided a means of professional employment for women in rural areas, equipping them with the ability to productively use existing skills.

A more streamlined government focus on the tourism industry with a clear vision for policy development in the coming years is also essential. In the aftermath of the Easter Attacks, a strategic plan is required, by appointing the right people to the right positions and maintaining consistency and standards, to cater to needs of tourists and promote the hospitality industry and give it more value.

Annex 3: Focus Group Discussion Guideline

MAPPING CREATIVE INDUSTRIES IN SRI LANKA:

Date:

Time:

Venue:

Number of participants:

Moderator:

Facilitator:

Record Keepers:

Introduction:

Purpose of discussion: The purpose of this discussion is to collect information on some subsectors of Sri Lanka's creative industry in order to:

- Establish a picture of the current size, scale and nature of the creative industries sector in Sri Lanka.
- Provide information to relevant government, sector and support agencies to enable the development of policies and strategies that can promote sector development.

Introduction (Team and roles):

The Institute of Policy Studies of Sri Lanka (IPS) on behalf of the British Council (BC) Sri Lanka is carrying out a research study on "Mapping Creative Industries in Sri Lanka".

Ground rules

Anonymity of the participants and confidentiality of the information will be protected.
No right or wrong answers, only differing points of view.
Permission for using the tape recorder.

Warm up

Please introduce yourself briefly. About your business, place of work etc.

1 UNDERSTANDING OF CREATIVE INDSUTRY

1.1 What do you understand by 'creative industry'?

1.2 How does your own sector fit into this understanding/definition? (Please select relevant subsectors for today's discussion)

Photography	Advertising & Branding
TV & Radio	Event production/management
Film & Video	Architecture
Performing arts	Interior design
Visual arts	Industrial design
Digital media	Fashion design
Software	Craft
Graphic design	Ayurveda & Lifestyle
Publishing	Culinary
Literature	Beauty culture

2 Profile

2.1 Today we are mainly focusing on ……………………………………………………..(please select the relevant sector). Can you explain the profile of your sector?

Photography & Film
Performing & Visual arts
IT
Publishing & Literature
Advertising & Event Management
Architecture & interior design
Fashion design
Craft
Ayurveda & Lifestyle
Culinary
Beauty culture

1.3 Approximately how many companies/ industries presently exist and in which area? (for services this question will not be relevant)

1.4 Are there any established clusters? If so where do they operate?

1.5 Approximately how many people are engaged in this sector? (better if we can get subsector wise)

1.6 Approximately how much does your specific sector contribute to the economy/GDP (as a %)?

1.7 In general, who are your main buyers (domestic/ foreign)?

3 NETWORKING

3.1 Are there any business/ professional associations directly involved with the sector?

3.2 How would you rate the level of cooperation amongst stakeholders within your sector?

High Average Low

3.3 What form does it take: (informal/formal/regular/ad-hoc) basis

4 GOVERNANCE AND REGULATIONS

4.1 Are you aware of any specific government policies that affect your specific subsector?

4.2 In your opinion, do these government policies, regulations or programmes encourage / facilitate your business activities?

4.3 If not do they discourage/ hinder your business activities?

4.4 What is the responsible ministry/ ministries in your sector?

4.5 Is there a strategic plan for development of the sector?

4.6 Are there any educational programmes available with relevant to your sector? (School/Technical/Undergraduate/ Master levels)

4.7 Who conducts these programmes?

4.8 Is the industry unionised?

4.9 Are there any intellectual property laws governing your sector?

4.10 Is there a strategic plan for the development of your industry over the next five years?

5 CREATIVE INDUSTRY POLICY

5.1 Is there a government policy on the following aspects?

- Facilitate the development of private investment and financing; ____________________
- Develop a global presence and market expansion; ______________________________
- Foster innovation and digital transition; ______________________________________
- Develop a strong ecosystem; ____
- Develop skills and leadership infrastructure; ___________________________________
- Fostering industry-government collaboration: __________________________________
- Providing training and support to attend trainings or trade shows: ___________________
- Adopting E-commerce policies to promote products: ______________________________

5.2 What more would you like to see in terms of government support?

6. CONSTRAINTS AND OPPORTUNITIES

6.1 What are some other general constraints and opportunities faced by the industry at large?

6.2 What suggestions do you have to address constraints?

6.3 What suggestions do you have to maximise opportunities?

7. DEVELOPMENT PRIORITIES

7.1 What are the main development priorities for the coming years?

Annex 4: KII Guidelines

Key Informant Interview Guideline

Project Name: Mapping Creative Industries in Sri Lanka

Introduction:

The Institute of Policy Studies of Sri Lanka (IPS) in collaboration with the British Council (BC) Sri Lanka is carrying out a research study on "Mapping Creative Industries in Sri Lanka". The aims of the research study are to; (1) Establish a picture of the current size, scale and nature of the creative industries sector in Sri Lanka. (2). Provide information to inform the design of interventions to support sector recognition, growth and development and (3.) Provide information to relevant government, sector and support agencies to enable the development of policies and strategies that can promote sector development.

You have been selected as one of the key stakeholders in this sector and we strongly believe that your expertise in this area would immensely help us in enriching this study. We would greatly appreciate if you could spend 15 minutes of your time to answer this questionnaire. We assure the confidentially of your interview and your insights will be invaluable for the success of this exercise.

BASIC DETAILS

1. Name of the Respondent: ______________________________
2. Institution/Designation: ______________________________
3. Address: ______________________________
4. Telephone & Email: ______________________________

ABOUT THE BUSINESS

5. Please explain your business activities
6. How long have you been in the business?

Identifying Creative industry

7. What do you understand by 'creative industry'?

8. Do you consider your work/enterprise to be part of the creative industries?
9. What do you see as the main subsectors in creative industry?
10. What are the countries would you consider as having shown a rapid growth in creative industries?

Sector specific questions

11. Who do you see as the main stakeholders in your specific sector?
12. ased on your knowledge how many enterprises operate in your specific area?
13. Do you work or employ with other creative enterprises in delivering your product or service?
14. Are you a member of any business association?
15. How can we get more information about your sector? For an example how many enterprises, employees etc. in the sector?

Government policies, REGULATIONS and programmes

16. Are you governed by any government policies or regulations?
17. In your opinion, do these government policies, regulations or programmes encourage / facilitate your business activities?
18. If not do they discourage/ hinder your business activities?
19. Are you governed by any other business or sector specific policies/ regulations/rules?
20. Do you know how other countries have promoted creative industries? (any strategies/ programmes implemented by other countries)

Constraints/ Opportunities

21. What are the constraints that you are facing presently?
22. What opportunities do you see from being part of a wider creative industry sector?

General questions on creative industry sector

23. Who else in your sector do you think we should be talking to in this survey?

Please provide any additional comments/suggestions

Annex 5: Members of the Steering Committee

Vikum Rajapakse	Managing Director, Kantala (Pvt) Ltd
Selyna Peiris	Director, Selyn
Ruwandika Senanayake	Senior Lecture, University of Moratuwa
W. C. Dheerasekera	Former Secretary, Ministry of Industry and Commerce
Alain Parizeau	Programme head of Graphic Design, Academy of Design
Shamalee de Silva	Content Creator,Fashion Market
Kesara Ratnavibhushana	Principal Photographer, Kesara Ratnavibhushana Photography
Dinesh Rajawasam	Managing Director, Anim 8
Sanora Rodrigo	Chapter Lead, Ladies Wine & design
Lee Bazalgette	Founder/ Director, Colombo Design Studio
Representatives from the National Enterprise Development Authority	

Annex 6: FGD Participants

Photography	
Mr. Sithumini Rathnamala	Senior Lecturer UOM
Mr.G. Hettiarchchi	Foto Focus
Mr.Thilak Godamana	Nine Hearts
Mr. Henry Rajakaruna	-
Mr.Priyantha Amarasinghe	-
Mr. Boopatrhy Nalin Wickramasinghe	Visiting Lecturer
Mr. Harsha Jayasekera	Member State Adivisory Board
Mr.Sarath Perera	Sarath Perera Photography pvt Ltd
Publication & Literature	
DR. Chandra Amarasekara	Consultant NIE
Miss. Sepali Mayadunne	Sinhala Writer
Mr. S. Raveendran	Tamil Writer
Mrs. Lalana Yapa	Director, Vijitha Yapa
Mr. Piyasena Wickramasinghe	Bhadraji Enterprises
Mr. Tharaka Gamage	Sci-Tech Publishing Corporation
Mr. MiltoniltonThilagaratne	Nanila Publications
A A Junaideen	AAJ films
Mr. M.D.Kalistus Jayamanna	Journalist
Mr. Sripali Perera	Sarasavi Publications

Performing arts & Visual arts	
Janaka Kottegoda	Senior Lecturer, University of Performing Arts & Visual Arts
Isuru Weerasinghe	Temporary Lecturer, Performing Arts & Visual Arts
Lalith Kalubowila	Artist
Asha Chandanie Wijesekara	Dancing Teacher , Kalayathana
Manel Jagoda	Artist/ Dramatist
Ranga Jagoda	photographer
Ravibandhu Vidyapathi	Dancer /
Arun Premathilake	Playwright/ actor
Sandev Handy	Museum of Modern and Contemporary Art
Sharmini Pereira	Museum of Modern and Contemporary Art
Tracy Holsinger	Mind adventures theater co. artistic director
MalshaniDelgahapitiya	Chithrasena Vajira Dance foundation
	Lianel went arts manager
Heshama	Chithrasena Dance Company
Fashion Design	
Miss. Katt Scott	Head of Fashion Design- AOD
Mr. Lalantha Watudura	EL Holdings Chairman
Miss.Marissa Gnanaraj	Independent Designer
Miss. Atelier Amilani Perera	Amilani Perera designer wear

Miss. Charini Suriyage	Charini design wear
Miss. Manojee Buwaneka	Addmee fashion
Mr. Michael Wijesuriya	Michael's Propriter
Dr. Nirmali De Silva	Senior Lecturer UOM
Dr. Achini Ranaweera	Senior Lecturer UOM
Miss. Sanjeewi Bandara	Sansudi Fashion
Advertising	
Namal Jayasuriya	Bondstreet
AnupaSenarathne	Bondstreet
S.Kalaichelvan	ManthramPvt Ltd
Sujan Amaratunga	MULLENLOWE
Abhishek Hariharan	MULLENLOWE
Heshan Kirindagamage	ZMessanger
Architecture	
V K S Isharaka	Culture Creations
Ashani Goonewardena	ON Design Interior Designer
Senakaperera	Charted Architect
E L Sam	J B L Interior and furniture

Prasanna Liyanage	University of Moratuwa
Graphic Designing & Digital Media	
Mr. Rushith Dissanayake	Freelance designer
Mr. Chinthaka Sandaruwan	Head of Design Arimac Lanka
Mr. Dilan Gunasekara	Senior UI/UX designer, Arimac Lanka
Miss. Sanora Rodrigo	Freelance Art director
Miss. Danushri Welikala	Freelance Graphic Designer
Miss. Piyumi Wickrama	Freelance
Miss. Shanika Perera	Freelance Graphic designer

Annex 7: KII Participants

Ashanthi De Alwis	Photographer
Mahesh Mannapperuma	Photographer
Gamini Saparamadu	Chairman, Kent
Sumudi Suraweera	Director, Music Matters
Anthony Surendra (Shakthi)	Musician
Mrs. Chandra Perera	Traditional craft artisan
Pradeep Thalawatta	Past Lecturer UOJ, Founder Kolam
Dr.T Weerarathna	Director, Ministry of HealthNutrition & Indigenous Medicine
Dr K. Chandi Perera	Sectional Head/ Ayurveda, Institute of Indigenous Medicine
Mr. Gerard Mendis	Chairman, Gerard Mendis Holdings (pvt) Ltd
Harris Wijeyasinghe	Make-up Artist
Lonali Rodrigo	CEO, House of Lonali
Vikum Rajapaksha	Co-founder, Kanthala
Ruwandika	Lecturer, Integrated Design UOM
Palitha Wijeratne	Founder Environmental Planning Services
Mr.S.Gunathilake	Deputy Director, National Craft council
Anish wijesinghe	Game Designer, Motion Miracles
Mr. Murtaza Tajhboy	Chief strategy Officer , Leo Burnett Sri Lanka
Shane Wilson	Secretary AAAA , Triad
SathyaMoorthy	President AAAA, Managing Director Magic Mango
Russell Miranda	Arts-based Creative Director, Dentsu Grant
Mr. Sarva Ameresekara	Triad (Pvt) ltd
Arjuna Ranawana	Capital Media (Pvt) Ltd ,15, Station Rd, Colombo 03.
Ravindra Randeniya	Actor
Rizzak Akram	Founder , Oceans & Continents Pvt Ltd
Ashwajith Boyle	Founder Fold Media
Darshana Ralpanawa	
Mr. Veerasamy Kumaran	Immediate Past President, SLPA
Dr. Dishani	Senior Lecturer, UOM, Media Department
Mr.Roshan Wijeyaratne	Managing Director, Event Productions (Pvt) Ltd
Dr. Viramanie Vandernpooten	Lecture, Open University

Annex 8: Validation Workshop participants

Ruwandika Senanayake	Senior lecturer, University of Moratuwa
Vikum Rajapakse	Kantale (Pvt) Ltd
Kesara Rathnawibhushana	Artist Kesara Photography
Nirmali De Silva	Senior lecturer, University of Moratuwa
W.D.C. Dheeerasekera	Former Secretary Ministry of Industry and Commerce
Raveen Jayamaha	NEDA
Roshan Nilaweera	CEO, Third Space Global
Mr.G. Hettiarchchi	Foto Focus
Mr. Harsha Jayasekera	Member State Advisory Board
Lonali Rodrigo	House of Lonali
Janaka Kottegoda	Senior Lecturer, University of Performing Arts & Visual Arts

Annex 9: Brainstorming Session Participants

Sanora Rodrigo	Chapter lead , Ladies Wine & Design
Dinesh Rajawansa	Anim 8
Lalindra Amarasekara	Managing Director, Cyber Illusion
Rivini Mataraarachchi	Senior lecturer, University of Moratuwa
Ruwandika Senanayake	Senior lecturer, University of Moratuwa
Priyantha Wickramasighe	Assistant Director, National Design Center
M.A.S.S.K. Chandrasiri	Director, National Design Center
Lee Bazalgette	Director, Colombo Design Studie
Vikum Rajapakse	Kantale (Pvt) Ltd
Alifiya Mutaher	Founder, Colombo Design Market
Pathum Egodawatta	Founder, Mooniak
Kesara Rathnawibhushana	Artist Kesara Photography
E.A.T. Suresh	Architect
Kasun Jayamnna	Interior Architect
Chani Perera	Lead Designer, Riot House
Nirmali De Silva	Senior lecturer, University of Moratuwa
Karen Macleod	Creative director, AoD
Anupama Nawalage	General Manager, AoD
Sanjaya Wijerathna	NEDA
Ayesha Rahman	Director, Lanka Decorative Art

Annex 10: Field Survey Questionnaire

Mapping Creative Industries in Sri Lanka

100/20,
Independence Avenue
Colombo 007
Sri Lanka

Survey Questionnaire

Household Number

Questionnaire Code

District	DS Division	Name of the GN division	Name of the village

Name of the Enumerator			Signature		
Name of the Supervisor			Signature		
Could household be located?	1. Yes	2. No	Was the questionnaire completed?	1. Yes	2. No
If not, why? ………………..……………………………………………………………… .			If not, why? ………………………………………………………………………………		
Date Completed (dd/mm/yy)					
…………………………………………………	…………………………………………………	…………………………………………………			
Signature of internal supervisor	Signature of data entry operator	Signature of data entry manager			

1. Personal Information

1.1 Sex of Entrepreneur/Major Decision Maker	[1] Male	[2] Female
1.2 Age of Entrepreneur/Major Decision Maker	[1] 18-30 years [2] 31-50 years [3] 51- 70 years [4] Above 71	
1.3 Educational Qualification of Entrepreneur/Major Decision Maker	1 Passed Grade 1 2 Passed Grade 2 3 Passed Grade 3 4 Passed Grade 4 5 Passed Grade 5 6 Passed Grade 6 7 Passed Grade 7 8 Passed Grade 8 9 Passed Grade 9 10 Passed Grade 10 11 Passed G.C.E.(O/L) or equivalent 12 Passed Grade 12 13 Passed G.C.E.(A/L) or equivalent 14 Passed GAQ / GSQ 15 Passed Degree 16 Passed post Graduate / Diploma 17 PhD 18 Vocational education 19 Other form of formal professional/technical training 20 Special Education learning / learnt 21 No Schooling	

2. Business Information

2.1 What is your employment status?	[1] Employer [2] Employee [3] Own account worker (self-employed) [4] Freelancer [5] Unpaid family worker
2.2 To which subsector of the creative industry do you fall into? (If you are involved in more than one, please rank as 1,2 & 3, where 1 indicates the primary industry and please answer rest of the questions based on it.)	see table below

Industry subsector	Rank
[1] Film, TV, video & photography	
[2] Music, performing arts &visual arts	
[3] Literature, publishing and printing	
[4] Arts, Heritage and crafts	
[5] Culinary art	
[6] Beauty culture	
[7] Software – Graphic design, gaming, digital creatives	
[8] Advertising and Branding	
[9] Architecture& Industrial design	
[10]Design: Fashion design & Interior design	
[11]Event production	
[12]Ayurveda & Life-style products	

2.3 What share of your business can be identified as creative? (Hint: Creativity is the process of bringing something new in an innovative way into the existing business)	[1] Less than 10% [2] 10%-30% [3] 30%-50% [4] 50%-70% [5] Over 70%
2.4 How long have you been in this business?	[1] Less than 1 year [2] More than 1 year but less than/equal to 2 years [3] More than 2 years but less than/equal to 5 years [4] More than 5 years but less than/equal to 10 years [5] More than 10 years
2.5 At present how many employees are engaged in your business?	[1] No employees/ sole trader [2] 2 or less than 10 employees [3] 10> and >=50 employees [4] 50> and >=100 employees [5] More than 100 employees
2.6 Approximately how many of them are female?	[1] Less than 5 [2] Less than 10 employees [3] Less than 50 employees [4] Less than 100 employees [5] Over 100 employees
2.7 How many employees are directly involved in creative activities?	[1] Less than 5 [2] Less than 10 employees [3] Less than 50 employees [4] Less than 100 employees

(Hint: Who bring/does something new in an innovative way in the existing business)	[5] Over 100 employees
2.8 Approximately how many of them are female?	[1] Less than 5 [2] Less than 10 employees [3] Less than 50 employees [4] Less than 100 employees [5] Over 100 employees
2.9 How many creative employees joined your business within the past year?	
2.10 How many of these new employees are female?	
2.11 Would you like to tell us your monthly income	[1] Yes [2] No
If yes , please go to Question 2.12 if not go to 2.13	
2.12 What is the monthly income of your business?	[1] Less than Rs. 10,000 [2] Rs. 10, 000 - less than Rs. 50,000 [3] Rs. 50, 000 - less than Rs.100,000 [4] Rs. 100, 000 -less than Rs. 500,000 [5] Rs. 500,000 or more
2.13 What proportion of income generated can be attributed to creative activities?	[1] Less than 10% [2] 10%-30% [3] 30%-50%

	[4] 50%-70% [5] Over 70% [6] Don't possess that information	
2.14 How do you market your product / service?	If it is a product: [1] Retail shops [2] Wholesale [3] Markets and super markets [4] Exhibitions [5] Other (specify)	If it is a service: [1] Individual customer service [2] Social media [3] E-marketing [4] Conduct events [5] Other (specify)
2.15 Who are your main buyers/clients? Around what share do they account for?	Buyer Share (%) [1] Local buyers [2] Foreign buyers [3] Both	
2.16 Do you export your products/ service?	[1] Yes [2] No	
2.17 If yes for 2.14, what are the main countries you export to, and what are the shares exported?	Country Share (%) [1] [2]	

2.18 Approximately what share of creativity within your business comes from Sri Lanka (as opposed to from abroad)? (Hint : Share of creativity generated within locally)	[1] Less than 10% [2] 10%-30% [3] 30%-50% [4] 50%-70% [5] Over 70%
2.19 How sustainable is your business? Does your business have a positive social and environmental impact?	[1] Yes [2] No
2.20 If yes, what share of your activities can be considered as being so?	[1] Less than 10% [2] 10%-30% [3] 30%-50% [4] 50%-70% [5] Over 70%

3. Supporters/ Influencers/Networking

3.1 Are you a member of any business association/s or professional body/networking organisation?	[1] Yes [2] No
3.2 If yes, what are they?	[1] [2] [3]
3.3 How many of your employees are members of professional associations?	
3.4 Are you aware of any associations that they are part of?	
3.5 Do you receive any support (product development/ marketing/ innovations etc.) from any institution?	[1] Yes [2] No
3.6 If yes, what are they?	[1] Government [2] Local Sponsors [3] Foreign Sponsors/ International Organisations [4] Business Associations [5] Other please specify ………………………………
3.7 Do you have any collaboration in product development/ business promotions / innovations etc?	[1] Yes [2] No

3.8 If yes, with whom?	[1] Government [2] International Organisations [4] Business Associations [5] Other please specify ………………………………

4. Opportunities/ Constraints

4.1 What are the constraints in terms of doing business(please rank accordingly)

	Factors	Rank
Business-re	Finding raw materials	1. High 2. Moderate 3. Low
	Identifying markets	1. High 2. Moderate 3. Low
	Cost of labour	1. High 2. Moderate 3. Low
	Cost of raw materials and processes	1. High 2. Moderate 3. Low
	Availability of technically skilled employees	1. High 2. Moderate 3. Low
	Availability of employees with soft skills	1. High 2. Moderate 3. Low

	lated factors	Raising capital	1. High 2. Moderate 3. Low
		Financing (accessing banks and collateral issues)	1. High 2. Moderate 3. Low
		Government regulations	1. High 2. Moderate 3. Low
		Economic conditions in the country	1. High 2. Moderate 3. Low
		Knowhow in costing products	1. High 2. Moderate 3. Low
		Standardisation of products	1. High 2. Moderate 3. Low
		Other (please specify)	1. High 2. Moderate 3. Low
	Other factors	Support for performing	1. High 2. Moderate 3. Low
		Availability of public spaces for performing	1. High 2. Moderate 3. Low
		Public awareness/appreciation of your product/subsector	1. High 2. Moderate 3. Low
		Exposure to networks/collaboration possibilities across businesses in your subsector or across subsectors	1. High 2. Moderate 3. Low
		Other (please specify) [1]	1. High 2. Moderate 3. Low
4.2 What are the opportunities that you have in doing business? (please rank accordingly)		**Factors**	**Rank**

	Business-related factors	Easy to Find raw materials	1. High 2. Moderate 3. Low
		Easy to identify markets	1. High 2. Moderate 3. Low
		Low cost of labour	1. High 2. Moderate 3. Low
		Low cost of raw materials and processes	1. High 2. Moderate 3. Low
		Availability of technically skilled employees	1. High 2. Moderate 3. Low
		Availability of employees with soft skills	1. High 2. Moderate 3. Low
		Raising capital	1. High 2. Moderate 3. Low
		Easy financing (accessing banks and collateral issues) system	1. High 2. Moderate 3. Low
		Government regulations	1. High 2. Moderate 3. Low
		Economic conditions in the country	1. High 2. Moderate 3. Low
		Knowhow in costing products	1. High 2. Moderate 3. Low
		Standardisation of products	1. High 2. Moderate 3. Low
		Other (please specify)	1. High 2. Moderate 3. Low
		Support for performing	1. High 2. Moderate 3. Low

	Other factors	Availability of public spaces for performing	1. High 2. Moderate 3. Low
		Public awareness/appreciation of your product/subsector	1. High 2. Moderate 3. Low
		Exposure to networks/collaboration possibilities across businesses in your subsector or across subsectors	1. High 2. Moderate 3. Low
		Other (please specify)	1. High 2. Moderate 3. Low

5. Governance

5.1 Have you obtained any form of intellectual property rights?	[1] Yes [2] No
5.2 If yes, what are they?	[1] Trademarks [2] Copyrights [3] Patents [4] Other

5.3 Are you aware of any government policies that affect your business or your specific subsector?	[1] Yes [2] No
5.4 If yes, please mention them	[3] [4] [5]
5.5 Are you aware of taxes and other regulations that apply to your business/subsector?	[1] Yes [2] No
5.6 If yes, what are they?	[1] [2]
5.7 What is the relevant government ministry / department responsible in your sector?	[1] [2] [3]
5.8 Please rank your views on government support relevant to your field in relation to the following aspects	Fostering industry-government collaborations: 1. High 2. Moderate 3. Low
	Providing infrastructure and developing an ecosystem: 1. High 2. Moderate 3. Low
	Providing training and support to attend trainings or trade shows: 1. High 2. Moderate 3. Low
	Providing other opportunities to facilitate talent 1. High 2. Moderate 3. Low

	Adopting E-commerce policies to promote products 1. High 2. Moderate 3. Low
	Providing opportunities for networking and collaboration across organisations and sectors 1. High 2. Moderate 3. Low
	Providing support to identify new markets/ products etc.: 1. High 2. Moderate 3. Low
	Providing support to access markets to sell products 1. High 2. Moderate 3. Low
5.9 What more would you like to see in terms of government support?	