Support the Design and Delivery of Creative Economy Policy Development Grants

Recommendations for the Development of the Creative Industries in Uzbekistan

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Executive Summary

Since the 1990s the government of Uzbekistan, with support from a variety of international organisations and agencies, has been introducing measures to support the growth and sustainability of cultural producers and creative businesses. More recently this has included specific measures to support the tourist industry and traditional arts and crafts that help to underpin it, and to develop the night-time economy.

As a contribution to this long-term process, the British Council commissioned this study as part of its own programme supporting the growth of creative economies in Central Asia, the South Caucasus and parts of Eastern Europe, with a view to improving the evidence-base for government policies and to explore areas of possible future partnership between Uzbekistan and the United Kingdom. The aim was to provide an overall profile of the creative industries in Uzbekistan, drawing on quantitative and qualitative sources, and engagement with industry stakeholders, and to offer recommendations for next steps to support the further development the sector.

In developing our findings, the authors drew on: available official statistics; desk-based reviews of existing relevant literature; a series of focus groups with industry stakeholders and experts; and an illustrative survey of creative businesses. This report provides:

- A brief overview of existing programmes: those run by the Government of Uzbekistan and others under the auspices of international organisations, including the British Council, the Swiss Government and UNESCO.
- Sector analysis, based on the limited official data currently available, including mapping the numbers and size distribution (by employees) of businesses across the different creative subsectors – we identified a total of just under 10,000 businesses across the creative industries, the vast majority with fewer than 10 direct employees (consistent with other countries).
- Details of the issues raised in the focus group discussions and business surveys, based around a number of broad emerging themes including: the scope for better data, the importance of both traditional and contemporary creative sectors; regional distinctions; institutional structures and regulation; skills development; access to finance and international markets; and priorities for audience development.

The report offers a number of recommendations, highlighting in particular the need for more comprehensive mapping and data, the need for a broader skills strategy (focusing especially on business, marketing and producing skills), and the need for more systematic co-operation between government and the creative industries. Details of proposed ways forward are described under each theme in the Key Findings chapter, with a full summarised list of recommendations at the end of the document. Key areas of need identified include:

- Adopting a single definition of the creative industries.
- More comprehensive data, with a suggested Data Improvement Plan.
- Initiatives to promote alignment and cross-fertilisation between some of the traditional arts and crafts sectors with emerging arts practice and digital technologies.

- Further investigation and gathering of regional data to identify emerging clusters of creative businesses and the skills needed to support them.
- A joint government/industry body to consider such issues as business regulation, Intellectual Property protection and enforcement, fiscal incentives and skills provision.
- A more comprehensive view of skills needs, focusing on general business and entrepreneurial skills as well as creative and technical skills.
- Support for investment and business development domestically and further develop existing initiatives to promote the creativity industries internationally.
- A more concerted approach to promoting cultural tourism, domestically and internationally.
- Strategies for audience development, especially outside Tashkent.

Introduction

The Rise of the Creative Industries

Prior to the Covid-19 pandemic, the Creative Industries had been one of the fastest growing global sectors and despite recent setbacks, it is increasingly recognised internationally as an essential contributor to future economic growth. For example, UNESCO currently estimates that the cultural and creative sectors account for 3.1% of global GDP and 6.2% of all employment.[1]

The sector is also resilient against Artificial Intelligence and automation with research by the UK innovation foundation, Nesta, finding that only 15% of jobs in the creative sector are likely to be replaced by automation.[2]

Beyond the direct economic benefits of productivity, growth and employment within the creative industries and cultural sector, there has been a growing recognition in recent years of the wider value that they contribute through positive impacts on (for example) education, skills, health, wellbeing, national identity and global influence; and the further value that could be achieved through a more united, coherent and inclusive approach to supporting creativity and culture – including more attention given to stimulating the creative potential of individuals and exploiting the points of connection between commercial and subsidised activity, both of which are vital to the creative ecosystem.[3]

Creative Industries in Uzbekistan

In the past, the creative industries and the creative economy were not widely recognised as a coherent policy concept in Uzbekistan, despite the significant profile and growth opportunities (including as drivers for inbound tourism) for a number of creative sectors. This is particularly true for crafts and textiles, and visitor-based experiences such as museums and theatres.

Since independence in the early 1990s, the Uzbekistan government has introduced measures to support cultural producers and business which, alongside programmes by the British Council and other global institutions, have sought to foster growth, capacity-building, entrepreneurship, partnership development and knowledge-sharing (see Existing Policy and Programmes). The Government has more recently placed a high priority on promoting the growth of tourism and the development of the 'Night-time Economy', with creative businesses having a potentially significant role to play in both. In this regard, the sector has huge potential given the country's rich and historical cultural legacy, both in its own right, and in contributing to other key sectors of the economy.

There is now increasing recognition amongst policymakers of the importance and potential of the creative industries in Uzbekistan. However, there has been no systematic mapping of the creative industries in Uzbekistan. Existing information on the profile, geographic spread and potential of the sector is limited and inconsistent. For example, Tashkent is understood to have a significant concentration of creative industries, with many working in the sector being freelance – as with the creative industries in many other countries around the world - but current available data does not enable this to be accurately measured.

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[1] UNESCO (2022)
[2] LGA (2020) Pg.6
[3] The Warwick Commission (2015)

This Project

The British Council commissioned this mapping project under its new three-year Creative Economy programme, which focuses on policy development, enterprise and cultural leadership across Central Asia, South Caucasus, Turkey, Ukraine and Western Balkans. The new programme will enable the development of the creative sector across these countries via connections with the UK, with an emphasis on how to support countries 'in transition' in making the case for the creative economy, and practical interventions to support its progress. This also includes the development of new partnerships with a view to longer-term collaboration with the UK partners.

The overall aim of this project was to produce the first overall map and profile of the creative industries in Uzbekistan, drawing on available data, literature and stakeholder engagement with the sector.[4] We obtained limited statistical information, but have used this, alongside other inputs (with a significant reliance on qualitative research and interviews) to offer broad analysis, highlighting the current shape of the creative industries in Uzbekistan and providing some broad recommendations to consider for the further development of the sector. Hence, it is important to emphasise that the findings are indicative and further research and engagement would be needed to refine them and develop specific plans for implementation.

Based on British Council projects in many countries, including in Central Asia, this project outcomes are designed to provide positive assistance to creative businesses and business investors in Uzbekistan as well as to the government and policy planners.

Hence, the **objectives** are to provide:

- Recommendations on defining the Creative Industries for Uzbekistan, based on international Standard Industrial Classification codes.
- Preliminary mapping of the national profile of the Creative Industries including their contribution – both actual and potential – to the country's economy.
- Policy recommendations for next steps to support the further development of creative industries in Uzbekistan.

In doing so, it seeks to provide the following **outcomes**:

- Strengthened shared understanding of definition and profile of the creative industries as a key economic sector in Uzbekistan.
- An improved evidence base, to inform policymaking on the development of the creative industries and their contribution to related Uzbekistan Government priorities including tourism.
- A base for further partnership working between British Council and the Uzbekistan Government.

The project was undertaken by consultants from Counterculture Partnership LLP (UK) participated in the project - Jon Zeff, John Newbigin and Tara Tank, with support from the Arts

[4] It follows an earlier British Council study in 2018 to map the creative industries in Kazakhstan, which was seen as an important milestone in the development of the sector and latterly a benchmark for Uzbekistan. See Pratt et al. (2018)

and Culture Development Foundation in Uzbekistan as the main project partner. The project was also supported by a local expert Gunesh Khodjakuli and was developed through the British Council by Jamilya Gulyamova, Deputy Director in Uzbekistan and Galina Koretskaya, Head of Arts in Kazakhstan.

The report is split into the following sections:

- Methodology
- Existing Policy and Programmes
- Mapping the Creative Industries in Uzbekistan
- Key Findings
- Recommendations and Conclusions
- Appendices

Methodology

There is no universally accepted definition of the creative and cultural industries or the creative economy. How industries or sectors of the economy are defined determines the activities they include and can influence the policies that apply to them (e.g. funding, support, taxation, education, international trade, economic development, law). As Nesta, the UK innovation agency, explains:

"It is easy to understate the importance of clear definitions and reliable economic statistics to the formation of good policy. Yet, without these tools, policymakers risk missing the most important ***sources of employment and growth****; it becomes much harder to maintain a* ***coherent policy framework****, and impossible to* ***track progress****."*[5]

Policymakers have adopted their own approaches in classifying and defining the creative industries, based on their own unique circumstances and the data available: for some, such definitions are closely aligned with (or even limited to) arts and culture; for others they can include food, tourism, sport, heritage, education, IT, or the night-time economy. There are many local cultural practices and traditions to consider. For example, 'puppet theatre' appears in some country classifications (e.g. Ukraine, Kazakhstan) but not others (e.g. UK).

The UK has a long history and global reputation as a creative nation, with well-established regulatory and intellectual property frameworks. In the 1990s, the UK Government Department for Digital, Culture, Media and Support (DCMS)[6] formalised the concept and measured the sector in terms of scope and economic value; a pioneering movement that has since been adopted by many countries and organisations such as UNCTAD[7] and UNESCO[8] frameworks for cultural statistics.

Within this context, this section outlines the framework for Uzbekistan.

Definitions: Creative Industries and Creative Economy

Whilst detailed context and priorities vary from nation to nation, it is useful as a starting point to consider how the approach to defining the creative industries has developed internationally, particularly in countries which have a longer experience of formulating, implementing and evaluating policy for the creative industries and the economic and wider societal benefits that it can provide.

Since the UK's approach in the 1990s, the understanding of the creative industries has developed in the UK and around the world. A broader understanding of culture and creativity has emerged, extending from traditional performing arts to digital-based industries such as gaming and cinema, to manufacturing, retail and repair of equipment.

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[5] Nesta (2013) Pg.26
[6] DCMS is the Government Department with responsibility for arts, culture and creative industries in England and some aspects of the media throughout the UK (e.g., broadcasting, internet). DCMS also works in partnership with other HM Government departments on areas of joint responsibility in relation to culture and the creative industries, for example: tax incentives, business support, trade and investment, and education and training.
[7] UNCTAD (n.d.)
[8] UNESCO (2009)

The overarching creative industries definition provided by DCMS in 2001 were:

"Those industries which have their origin in individual creativity, skill and talent and which have potential for wealth and job creation through the generation and exploitation of intellectual property."[9]

Table 1: DCMS Classification – Creative Industries

Creative Industries Sector
Advertising and marketing
Architecture
Crafts
Design and Designer Fashion
Film, TV, video, radio and photography
IT, software and computer services
Publishing
Museums, galleries and libraries
Music, performing and visual arts

It is also important to note, however, that there are a number of overlaps with the cultural, digital and tourism sectors within the DCMS definition.[10]

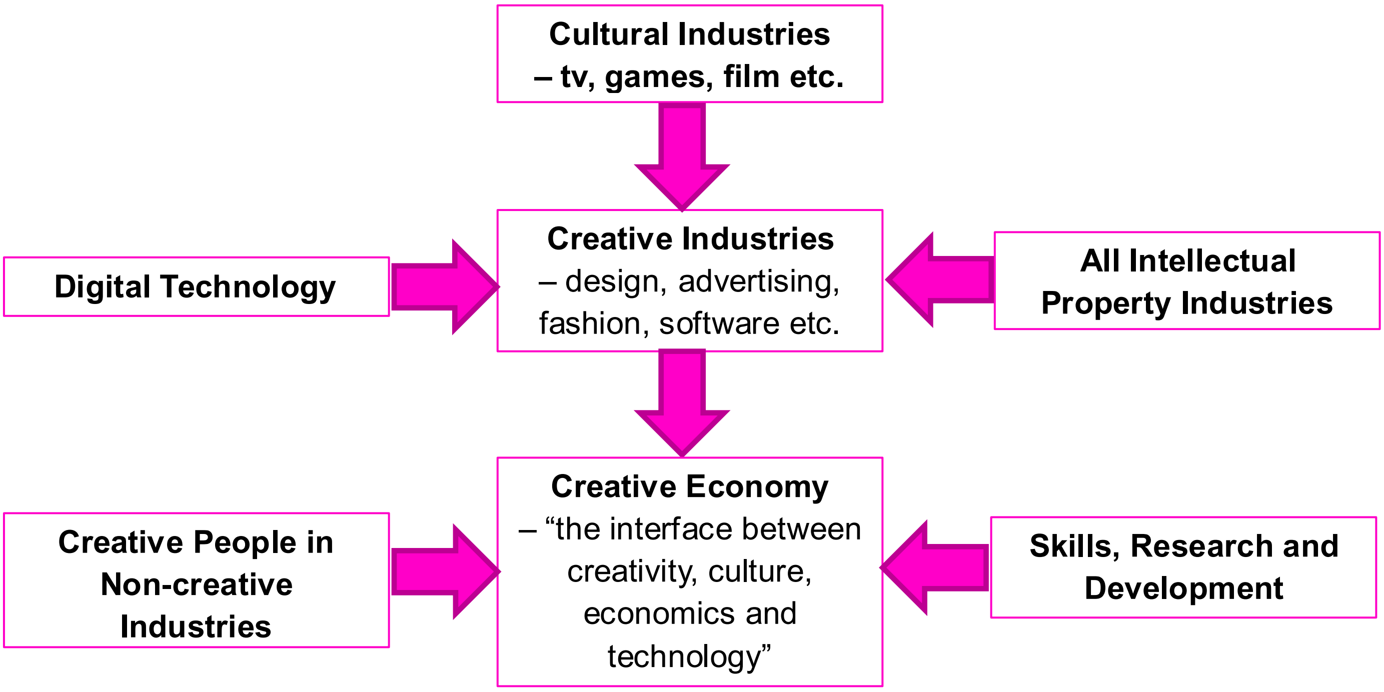
Since then, the understanding of the creative industries has developed, based on the idea of 'creative intensity` - essentially a measure of the proportion of the workforce which are in creative roles. Alongside this, the concept of a wider "creative economy" has developed to capture creative employment within different sectors of the economy.

The Creative Economy has been defined as:

"*Includes the contribution of those who are in creative occupations outside the creative industries as well as all those employed in the Creative Industries."*[11]

[9] DCMS (2001) Pg.5
[10] DCMS (2021)
[11] DCMS (2016) Pg.3

Figure 1: The Creative Economy Evolution. Source: Newbigin, John (2010) The Creative Economy: An Introductory Guide. Online at https://creativeeconomy.britishcouncil.org/blog/10/03/08/creative-economy-introductory-guide/



Hence, whilst the focus of this project is on an initial mapping of the creative industries in Uzbekistan, it is worth noting that these sectors sit at the heart of the wider Creative Economy in terms of employment:

"A subset of the Creative Economy which includes only those working in the Creative Industries themselves (and who may either be in creative occupations or in other roles e.g. finance)."[12]

The next section outlines how the Creative Industries have been defined for the purposes of this project using the DCMS classification and local context.

The Analytical Framework

In 2011, Uzbekistan revised the National Classifier of Types of Economic Activity[13] to better reflect new and/or important activities – including those brought about by technological or organisational changes - and the preparation and dissemination of statistical information which could then be compared at the international level.

As with other economic statistical frameworks, it intends to classify units of economic activity (individual enterprises or groups of enterprises) and provide a basis for the preparation of statistical data in the field of economic statistics such as production, employment, national accounts.

The classifier uses a 5-level hierarchical classification. It is harmonised with international classification through the direct application of NACE Rev.2[14] at the four digital level ("Statistical

[12] Ibid. Pg.4
[13] For other statistical classifiers adopted/amended in Uzbekistan, see State Committee of the Republic of Uzbekistan on Statistics (2021)
[14] NACE is the standard statistical framework used outside of the USA.

classification of economic activities in the European Community", adopted by the European Commission in 2006), whilst including the 5th level to reflect the specifics of the national economy. Adopting the international system, made it possible to gather and analysis data in this project.

The definition of the Creative Industries in the UK and internationally generally recognises nine key subsectors which are mapped into specific international classification codes (ISIC) for the creative industries. These are then translated into NACE Rev. 2 (in alignment with DCMS):

- Advertising and marketing
- Architecture
- Crafts
- Design: product, graphic and fashion design
- Film, TV, video, radio and photography
- IT, software and computer services
- Publishing
- Museums, galleries and libraries
- Music, performing and visual arts

However official datasets, including those obtained for Uzbekistan, tend to use a different categorisation for economic sectors, which do not identify and separately measure the creative industries per se. Under this categorisation, the creative industry subsectors are distributed across 5 core sectors:

- Manufacturing
- Information and Communication
- Professional, Scientific and Technical Services
- Education
- Arts, Entertainment and Recreation

Data Request and Evaluation

For the purposes of this report, we have used the DCMS classification at 4-digital level (NACE Rev.2) with some marginal adjustments to align with the definitions adopted in Kazakhstan. This was applied to the official statistical record held by The State Statistical Committee of The Republic of Uzbekistan at the four-digit level. We make recommendations in the findings around improving data and refining the definition of the creative industries for Uzbekistan, but we recommend staying close to this approach, to enable clear international comparison. A full list of statistical codes (at the four-digital level) in Uzbekistan relevant to the Creative Industries are provided in the Appendices, along with any exclusions.

The aim was to source a variety of information[15] at the national and sub-national level, and across a time-series. Based on the sourced data, we were able to assess a 5-year period across at the national level for:

- Employment
- Business Registrations (Registration of legal entities)
- Gross Domestic Product

From the analysis, it is evident that the official statistical sources currently available are likely to be substantially incomplete, and that further data collection and monitoring is needed to produce an accurate picture of the size and profile of the sector (see 'Better Data' in Key Findings and the Conclusions/Recommendations). We have presented our analysis with due consideration, and express caution with making additional inferences from the data.

Additional Methodologies

Desk based review – analysing relevant data and literature such as existing national (or where relevant international) policies, strategies, evidence, reports, studies and impact assessments.

Stakeholder engagement - focus group interviews with creative leaders and representatives in Tashkent and Samarkand, as well as government officials. Key discussion topics were known opportunities and challenges, the importance of networks and the role of government.

Survey – a business questionnaire for select focus group participants. The survey yielded a small sample and whilst it provides a useful snapshot of the sector, the results are to be treated as anecdotal.

[15] For reference, this included economic output, size of workforce, number and size of enterprises, regional distribution of businesses, diversity of workforce and international trade.

Existing Policy and Programmes

This section provides an overview of key historic and contemporary measures which have worked to support the creative industries and wider arts, culture and heritage sectors in Uzbekistan. These have been enacted at both national and international levels, and by governments and organisations.

It outlines Uzbekistan policy and how they have impacted both business and creative outputs. This section also highlights programmes including those delivered by the British Council.

The intention is to provide an assessment of the current climate and the direction of travel, as a baseline for this projects' key findings and recommendations.

National Policy

Table 2: Uzbekistan National Policies (Decrees) Relevant to the Creative Industries

Decree	Year	Description
Measures to Further Improve the System of Support for Handicraft Activities[16] *See policy below for further details.*	2021	Aims are to exploit uncovered opportunities in the mahalla ('neighbourhood') system, foster knowledge exchange between artisans, identify new sales markets, education and youth employment in makhallas (specifically through tradition of 'usta-shogird'). Measures include: - Project financing of handicraft projects (from the framework of family entrepreneurship development programmes) - Preferential loans to Hunanarmand Association members for the purchase of equipment, materials etc., and infrastructure projects (centres for development, schools, house-museums, workshops). - Subsidies from the Fund for Attracting the Population to Entrepreneurship for artisans, pupils and masters covering materials, wages, digital marketing (domestic and international). - To create trade pavilions for handicraft products in Tashkent, Nukus and regional centres focusing on international exports and tourist routes (foreign and domestic).
On Additional Measures for the Further Development of Handicrafts and Support for Artisans	2019	Aims are to preserve national traditions and support employment (particularly in young people, women and low-income families). Measures include: - Regional specialisation in the main handicraft areas. - Ambassadors of Uzbekistan abroad to promote handicraft products and support artisans in the presentation and sale of their work (including support to develop trading houses and shops). - Create National Catalogue of Masters of Folk Applied Arts and register of artisans working in tourism (in 2021, 1500 were registered) with tax incentives among other benefits.
Measures to Accelerate the	2021	Aims include preserving traditions, increased outputs, improve international status and creating conditions for branding domestically and abroad with a particular view to attract young people into the sector.

[16] The National Centre of Legal Information (2021a)

Development and Support of Pottery[17]		Measures include: - Provision of raw materials, land, connections and equipment and favourable loans - Create pottery centres, galleries and production centres (pottery centres are to be accompanied by specific property and land tax rates and property rights). - Support for artisans and involvement of young people through improvements to activities of usta-shogird schools. - Subsidies to support domestic sales (linked with tourism) and exports of pottery (showrooms, digital platforms). - Subsidies for artisans for teaching (materials, wages etc.).
Measures to Hold the International Festival of Folk Applied Arts[18]	2019	To host inaugural International Festival of Folk Applied Arts under UNESCO in Kokand and support sector development in the country including through education and national identity building. Measures include: - To host festival every two years with a specific scientific and practical conference. - To introduce talent attraction programme with exhibitions and competitions in the run up to the festival. - To promote brand 'Kokand – the city of artisans of the world' and opportunities for tourism - Support for intergenerational knowledge-transfer, education and career routes to mastery.
On Creating Additional Conditions for Further Development of Tourism, Culture, Cultural Heritage and Sports[19]	2022	Accelerating the development of the infrastructure, effective operation of facilities and conducive conditions for population based on earlier decree.[20] Measures include: - Grants to support youth entrepreneurial activities including digital marketing (websites) and participation of tourist exhibitions (domestic) and international fairs.
On Measures to Raise the Film Art and the Film Industry to a Qualitatively New Level and Further	2021	Aims are to develop national cinematography industry, improve state support, and ensure effective production and distribution channels. Measures include: - Attracting foreign film companies and investors, as well as supporting co-productions.

[17] The National Centre of Legal Information (2021b)
[18] The National Centre of Legal Information (2019)
[19] The National Centre of Legal Information (2019)
[20] The National Centre of Legal Information (2019)

Improve the System of State Support for the Industry[21]		- Financial support for the production of national films and tv series including subsidies - Rebates for foreign and domestic film companies for the creation of audio-visual works in Uzbekistan - Creating advanced training system for creative and technical workers - Ensure copyright protection, film distribution system and national and international marketing - State-backed national TV production with young animators
On Measures to Further Enhance the Role and Importance of Culture and Art in the Life of Society[22]	2020	Aims are to modernise culture and art and provide training, talent development and improved educational resources (for youth). Additionally, increasing cultural services and activities, especially in remote areas. Measures include: - Event licensing monitoring through a centralised portal. - Mass events to be held on the basis of annual approved calendar. - Prohibiting the volunteering of creative figures and performers to state-led events. - Rental subsidies for live concert programmes in state buildings. - Measures to support Protection of Copyright include the development of dedicated Chamber.

[21] The National Centre of Legal Information (2019)
[22] The National Centre of Legal Information (2019)

Other historical measures include:

- [1996] On the Formation of the Touring and Concert Association 'Uzbeknavo' - a creative and production association overseen by the government, supporting the development of musical and dance art including international networks, coordination of tours and funding oversight.[23]
- [1997] On Measures of State Support for Further Development of Folk Arts and Crafts – establishing Hunarmand" (Handicraft) Association of Uzbekistan with members receiving tax incentives.[24]
- [1998] On the Development of Theatrical Art of Uzbekistan – including publication on monthly magazine, widened scope of training for specialist workers, higher education courses and updated teaching.[25]
- [2005] On the Formation of a Public Fund for the Support and Development of Independent Print Media and News Agencies of Uzbekistan – to support the democratisation and liberalisation of domestic mass media including creating a public fund for activities, programmes, training and retraining.[26]

International-led Programmes

British Council

- **Creative Spark:** Higher Education Enterprise Programme is a 5-year initiative (2018 - 2023) to support university and institutional partnerships with the UK to develop entrepreneurship and enterprise skills for students and young entrepreneurs across seven countries including Uzbekistan.[27]
- **Crafting Futures:** 3-year programme (2019-2022) to support improved understanding and opportunities to learn, train and expand businesses through cross-cultural exchange and shared learning between UK and local organisations. Aspects include skills and innovation, development of new audiences and markets and improvements to quality of production.[28]
- **Creative Producers:** 3-year programme (2019-2022) to promote creative production focused on contemporary of experimental arts in Kazakhstan and Uzbekistan, with
- **Creative Central Asia Network:** membership group representing the creative economy sector in partnership with the ololo group of businesses. Founded from the British Council Creative Central Asian Cultural and Creative Industries Forums (2017-

[23] The National Centre of Legal Information (1996)
[24] Hunarmand Association (2018)
[25] The National Centre of Legal Information (2005)
[26] The National Centre of Legal Information (2005)
[27] British Council (2018)
[28] British Council (2022)

2019) by the British Council and includes Uzbekistan. Tasks include joined-up policy development, knowledge-exchange, educational projects, and support for exports and branding.[29]

Swiss Agency for Development and Cooperation[30]

The Swiss Agency has worked in Uzbekistan since 1992 after it joined Swiss-led constituencies at the World Bank, the International Monetary Fund and the European Bank for Reconstruction and Development. The scope of works gradually increased and in 2002, the Swiss Cooperation Office (SCO) opened in Tashkent and followed by the signing of the bilateral framework Agreement "On Technical and Financial Cooperation and Humanitarian Aid" between Uzbekistan and the Swiss Confederation. The SCO now supports bilateral and regional projects on behalf of the Swiss Agency and Swiss Government.[31]

This includes the Central Asian Arts and Cultural Programme. Beginning in 2007, it works to support and enhance safe spaces for artisans (individuals and groups) in both urban and rural areas, in order to:

- Encourage artistic expression and cultural creativity that reflect diversity and open up spaces for a dialogue.
- Provide opportunities for strengthening artistic and management skills and competences of arts and culture actors.
- Reaching out to peripheral and culturally disadvantaged areas, securing more equal access to the cultural production and fostering links between communities.
- Promoting cross-country exchanges and cooperation, building bridges, sharing knowledge.

In 2016 the programme was extended to include multi-year partnership grants/support to local organisations to strengthen the capacity to provide these spaces.

Projects have included:

- Kinostudia Focus (Tashkent) – support for young film professionals in creating first short form documentaries on contemporary issues, with masterclasses, study trips (domestic and international) and mentoring by international expert.
- Ustoz va Shogird (Samarkand) – to develop regional theatre, broader audience in rural area and provide training to creative employees, concluding with a performance.

In the course of the programme, from Uzbekistan:

- 963 participants involved in arts productions
- 495 arts and culture professions with improves creative skills and techniques
- 70 events and 58 art products developed through the programme

[29] Creative Central Asian Network (2021)
[30] Swiss Agency for Development and Corporation (2019a)
[31] Swiss Agency for Development and Corporation (2019b)

- 29,410 people reached by the programme partners and projects

UNESCO

In 2019, Uzbekistan ratified the Convention on the Protection and Promotion of the Diversity of Cultural Expressions which:

"Recognises the sovereign right of States to maintain, adopt and implement policies to protect and promote the diversity of cultural expression, both nationally and internationally, the 2005 Convention supports governments and civil society in finding policy solutions for emerging challenges. provides a new framework for informed, transparent and participatory systems of governance for culture."[32]

Through the convention, a partnership developed between UNESCO and the Republic of Korea (Korea Funds-In-Trust) (UNESCO-KFIT) supporting 21 UNESCO projects in 14 countries across three thematic areas. On 'Building Skills' it seeks to support creative entrepreneurship and enterprise from creation, design and marketing to business and management. Through the project "Strengthening the Sustainability of the Film Industry in Uzbekistan", UNESCO-KFIT addressed the key issues facing the sector: capacity development, policy assessment and market access. Between 2017-18:

- 75 young professionals were trained in film and documentary screenwriting and production, improving their skills.
- 8 documentary films produced
- Partnerships developed between Uzbek and Polish film institutions through international exchanges (tours etc.)
- Modernised sector with improved international visibility.[33]

[32] UNESCO (n.d.)
[33] UNESCO & The Republic of Korea (2021)

Mapping the Creative Industries

In this section, we present the available data on the creative industries in Uzbekistan. We first establish the number of creative industry businesses and employees per sector of the economy, followed by creative industry subsectors as defined by DCMS (see Methodology).

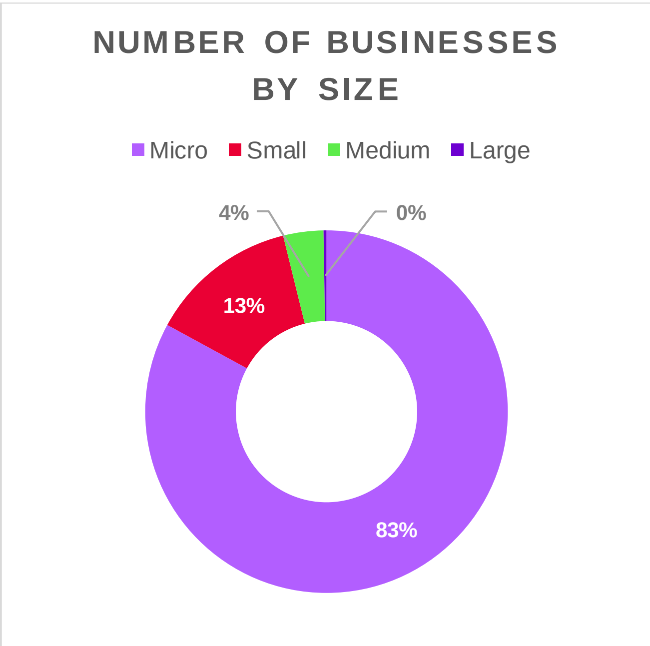
Sector Analysis

Table 3: Number of Registered Creative Industries by Sector of the Economy (2020)

Code	SECTOR/subsector	Micro	Small	Medium	Large	All	Employees
	Number of creative industries businesses/employees	7931	1264	343	25	9563	84068
	MANUFACTURING	**874**	**112**	**10**	**4**	**1000**	**7645**
1811	Printing newspapers	106	14	0	0	120	506
1812	Other types of printing activities	541	79	9	4	633	6217
1813	Preparation of printed forms and information activities	112	13	1	0	126	651
1814	Brochure-cover and decoration activities and related services	38	2	0	0	40	78
1820	Display records in distributors	23	0	0	0	23	26
3212	Manufacture of jewellery and similar items	54	4	0	0	58	167
	INFORMATION AND COMMUNICATION	**3284**	**263**	**56**	**6**	**3609**	**19752**
5811	Publishing books	179	7	0	0	186	538
5812	Publish references and lists	8	0	0	0	8	13
5813	Newspaper publishing	275	46	4	0	325	2058
5814	Publishing magazines and periodicals	155	19	0	0	174	633
5819	Other types of publishing activities	321	17	1	0	339	1016
5821	Extracting computer games	123	0	1	0	124	271
5829	Release other software	263	37	6	0	306	1736
5911	Production of film and television programs	259	11	4	0	274	1122
5912	The post-production phase of film and television programs	51	1	0	0	52	96
5913	Distribution of movies, videos and television programs	38	0	0	0	38	63
5914	Film screenings	90	5	0	0	95	251
5920	Activities for the publication of phonograms and musical recordings	77	1	0	0	78	115
6010	Broadcasting	75	6	1	1	83	685
6020	Activities for the creation and presentation of television programs	66	9	19	5	99	5081
6201	Activities in the field of computer programming	736	62	15	0	813	3840
6202	Computer technology consulting services	337	20	3	0	360	1129
6312	Web portals	84	3	2	0	89	285
6391	Activities of news agencies	147	19	0	0	166	820
	PROFESSIONAL, SCIENTIFIC	**3047**	**393**	**36**	**9**	**3485**	**21077**

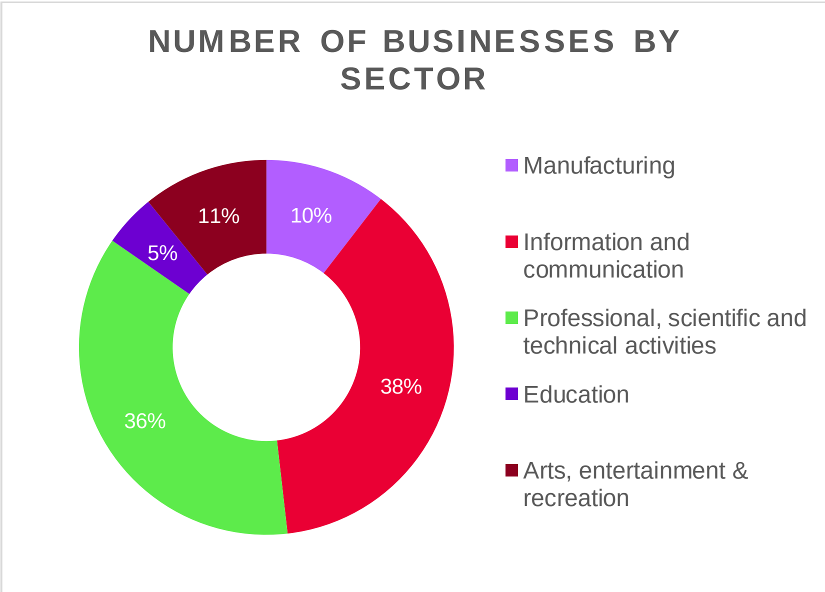
	AND TECHNICAL ACTIVITIES						
7021	Activities on interaction and relations with the public	277	27	8	2	314	2897
7111	Activities in the field of architecture	889	276	25	7	1197	12943
7311	Advertising agencies	872	55	2	0	929	2808
7312	Advertising in the media	117	7	0	0	124	319
7410	Specialized design activities	378	19	1	0	398	1078
7420	Activities in the field of photography	371	4	0	0	375	706
7430	Written and oral translation	143	5	0	0	148	326
	EDUCATION	**103**	**174**	**155**	**0**	**432**	**17108**
8552	Education in the field of culture	103	174	155	0	432	17108
	ARTS, ENTERTAINMENT & RECREATION	**623**	**322**	**86**	**6**	**1037**	**18486**
9001	Activities of theatres	56	6	31	4	97	5016
9002	Technical support of performances	101	11	0	0	112	339
9003	Activities in the field of art	151	6	3	0	160	572
9004	Activities of theatres and concert halls	90	3	10	1	104	2092
9101	Activities of libraries and archives	179	244	23	0	446	7276
9102	Museum activities	8	13	16	1	38	2286
9103	Activities for the preservation of historical sites and buildings, cultural monuments	38	39	3	0	80	905

Figure 2: Number of Creative Business by Size (2020)



In 2020, there were 9,563 creative industries businesses recorded and 84,068 employees, excluding self-employed individuals (Table 3). As with many other countries, the composition of the creative businesses across all sectors are predominantly microbusinesses (7931) (1-9 employees), followed by small businesses (1264) (up to 49 employees). To put it into perspective, approximately 83% of all creative businesses employ fewer than 10 people, whilst less than 4% of businesses have 50 or more employees (driven entirely by medium-sized businesses with 50-249 employees).

Figure 3: Number of Creative Business by Sector (2020)



Sector	Number of employees in the creative industries	Number of employees in whole sector	% of employees that are in the creative industries
Manufacturing	7,645	1,597,737	0.5%
Information and communication	19752	58707	33.6%
Professional, scientific and technical activities	21,077	131,634	16.0%
Education	17,108	1,158,161	1.5%
Arts, entertainment and recreation	18486	66975	27.6%

Table 4: Number of Employees in the Creative Industries by Sector of the Economy (2020)

The above table shows how creative businesses are distributed across the broad sectors of the economy used in standard breakdowns. Information and Communication has the highest number of creative businesses (3609 / 38%), as well the highest number of subsectors (19) and the highest number of creative industry employees across the sectors (33.6%) (Table 4). There is a varied landscape across the subsectors, with strengths in publishing, software, film and television, computer programming and computer technology services.

Education is the sector with the smallest number of creative industry businesses with just 432 / 5% of businesses. However it has a relatively substantial number of employees – the highest in fact for all subsectors - and a more even spread of business sizes than the other sectors. Creative industry employees nevertheless make up a small proportion of employment in that sector of the economy (1.5%).

In terms of subsectors, ‘Activities in the field of architecture’ (under Professional, Scientific and Technical Activities) has the highest number of businesses overall (1197 / 12.5%).

Manufacturing

Figure 4: Number of Creative Businesses in Manufacturing (2020)

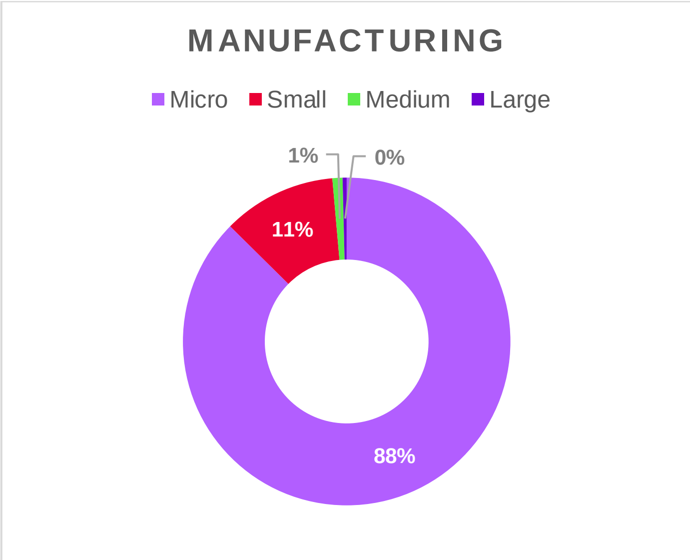


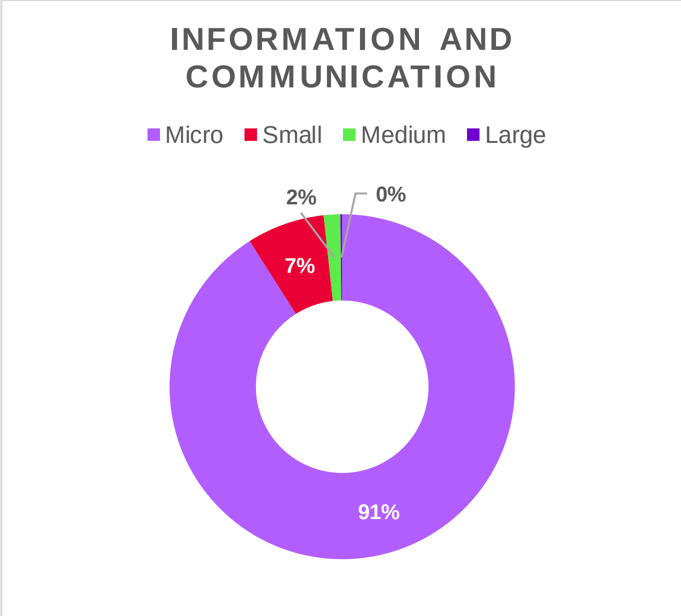
Figure 4 shows that the majority of creative manufacturing businesses are microbusinesses (88%), with little to no medium and large businesses which follows the wider trend previously mentioned.

‘Other types of printing activities’ is the biggest subsector with a significantly higher number of businesses across every size (633 overall) and employees (6217) than the other subsectors. It makes up 63% of all manufacturing businesses, 81% of total creative employment in manufacturing and is the only subsector to have large businesses (4).

‘Display records in distributors’ is the smallest subsector, with only 23 microbusinesses and 26 employees.

Information and communication

Figure 5: Number of Creative Businesses in Information and Communication (2020)



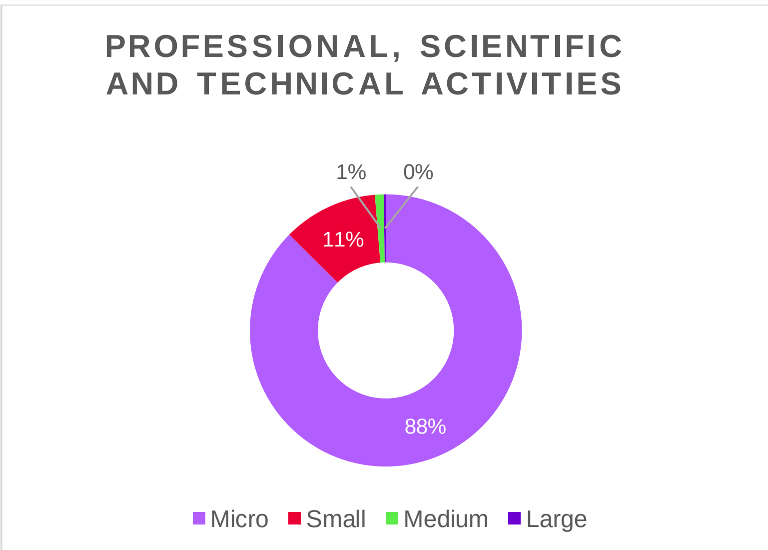
As with most other sectors, the majority of businesses are microbusinesses (91%), but this is the highest proportion out of all sectors.

‘Activities in the field of computer programming’ is the subsector with the highest number of businesses for the sector (23%) and, unsurprisingly then, has the highest number of micro (736) and small (62) businesses for the sector. ‘Activities for the creation and presentation of television programmes’ have the largest number of medium (19) and large (5) businesses, but again these businesses make a small proportion of the sector.

‘Publish references and lists’ is the smallest subsector, with just 8 micro businesses and 13 employees.

Professional, Scientific and Technical Activities

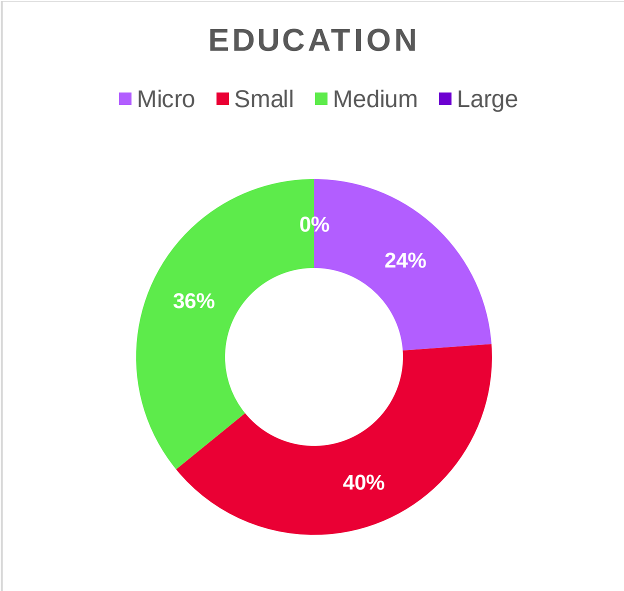
Figure 6: Number of Creative Businesses in Professional, Scientific and Technical Activities *(2020)*



As with most other sectors, the majority of businesses are microbusinesses (88%). ‘Activities in the field of architecture’ has the highest number of businesses of every size as well as the number of employees (61% of creative employment in the sector). The ‘Advertising in the media’ subsector has the smallest number of businesses (124) and employees (319).

Education

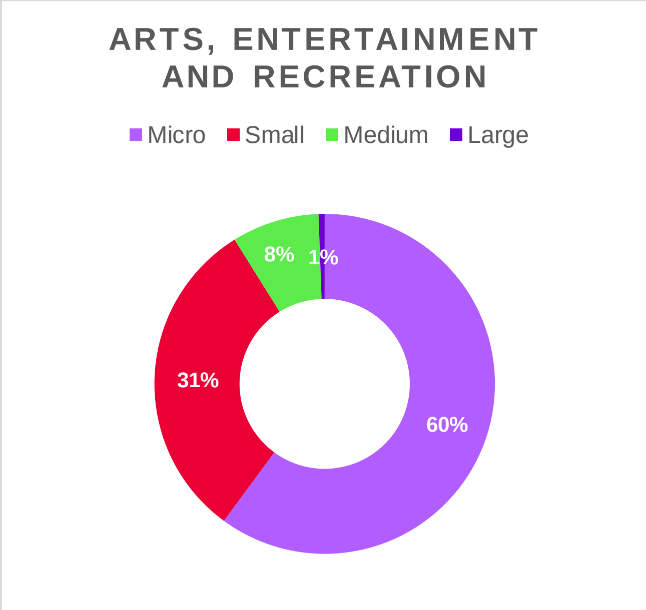
Figure 7: Number of Creative Businesses in Education (2020)



Education has a different composition compared with other sectors. There are no large businesses and otherwise a fairly equal spread of business sizes. Microbusinesses make up a smaller proportion of the sector (24%) after small businesses (40%). However, it is important to remember that only a small proportion of creative businesses fall into this category, which includes only one CI subsector, ‘Education in the field of culture’.

Arts, Entertainment and Recreation

Figure 8: Number of Creative Businesses in Arts, Entertainment and Recreation (2020)



Whilst microbusinesses make up the majority of the creative businesses in this sector (60%), this is lower than in most other sectors (Manufacturing, Information and Communication, and Professional, Scientific and Technical Activities). There is also a greater proportion of small (31%) and medium (8%) sized businesses.

The 'Activities of libraries and archives' subsector has the highest number of businesses in the sector (43% of creative businesses in the sector), whilst 'Activities of theatres' has a relatively more even spread of business sizes and has the highest number of employees (27%).

'Museum activities' has the smallest number of businesses (38) but has a significantly higher number of employees (2286) compared with other subsectors with a greater number of businesses such as 'Technical support of performances' (112 businesses and 339 employees), 'Activities in the field of art' (160 businesses, 572 employees) and 'Activities for the preservation of historical sites and buildings, cultural monuments' (80 businesses and 905 employees).

Changes Over Time

Between 2016-2020, the number of creative businesses has grown across all sectors (approximately by 60%). The number of employees has also grown, but with some variation across sectors/subsectors (on average 11%). The number of large businesses has stayed the same, but the number of microbusinesses has seen the highest growth.

Gross Domestic Product

Gross Domestic Product (GDP) for the republic of Uzbekistan in 2021 was 734,587.7 billion soums. The numbers below indicate GDP for each aggregated sector in billion soums in 2021. It is important to note that the five sectors cover more than creative industry businesses and without additional data, no inferences can be accurately made about the creative industries contribution to the economy. This is particularly true for Manufacturing, Education and Professional, Scientific and Technical Activities where creative industries employment makes up a smaller proportion of the sector.

- **Manufacturing:** 146,734.1

- **Information and Communication:** 11,659.7
- **Professional, Scientific and Technical Activities:** 8,060.8
- **Education:** 40,735.5
- **Arts, Entertainment and Recreation:** 2,494.2
- **Total:** 209,684.3

Sub-sectoral Analysis

Table 5: Number of Registered Creative Industries by Sector of the Economy (2020)

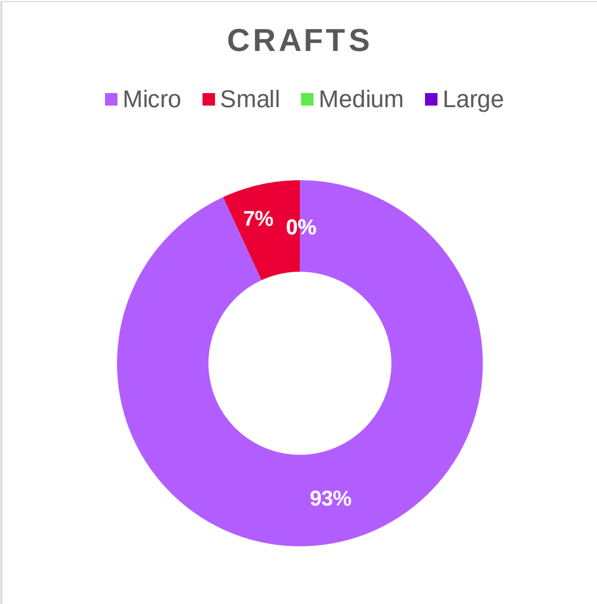
Code	SECTOR/subsector	Micro	Small	Medium	Large	All	Employees
	ADVERTISING AND MARKETING	**1266**	**89**	**10**	**2**	**1367**	**6024**
7021	Public relations and communication activities	277	27	8	2	314	2897
7311	Advertising agencies	872	55	2	0	929	2808
7312	Media representation	117	7	0	0	124	319
	ARCHITECTURE	**889**	**276**	**25**	**7**	**1197**	**12943**
7111	Architectural activities	889	276	25	7	1197	12943
	CRAFTS	**54**	**4**	**0**	**0**	**58**	**167**
3212	Manufacture of jewellery and related articles	54	4	0	**0**	58	167
	DESIGN AND DESIGNER FASHION	**378**	**19**	**1**	**0**	**398**	**1078**
7410	Specialised design activities	378	19	1	**0**	398	1078
	FILM, TV, VIDEO, RADIO AND PHOTOGRAPHY	**950**	**36**	**24**	**6**	**1016**	**8004**
5911	Motion picture, video and television programme production activities	259	11	4	0	274	1122
5912	Motion picture, video and television programme post-production activities	51	1	0	0	52	96
5913	Motion picture, video and television programme distribution activities	38	0	0	0	38	63
5914	Motion picture projection activities	90	5	0	0	95	251
6010	Radio broadcasting	75	6	1	1	83	685
6020	Television programming and broadcasting activities	66	9	19	5	99	5081
7420	Photographic activities	371	4	0	0	375	706
	IT, SOFTWARE AND COMPUTER SERVICES	**1690**	**141**	**27**	**0**	**1858**	**8081**
5821	Publishing of computer games	123	0	1	0	124	271
5829	Other software publishing	263	37	6	0	306	1736
6201	Computer programming activities	736	62	15	0	813	3840
6202	Computer consultancy activities	337	20	3	0	360	1129
6312	Web portals	84	3	2	0	89	285
6391	Activities of news agencies	147	19	0	0	166	820

	PUBLISHING[34]	**1901**	**202**	**15**	**4**	**2122**	**12062**
5811	Book publishing	179	7	0	0	186	538
5812	Publishing of directories and mailing lists	8	0	0	0	8	13
5813	Publishing of newspapers	275	46	4	0	325	2058
5814	Publishing of journals and periodicals	155	19	0	0	174	633
5819	Other publishing activities	321	17	1	0	339	1016
7430	Translation and interpretation activities	143	5	0	0	148	326
1811	Printing newspapers	106	14	0	0	120	506
1812	Other types of printing activities	541	79	9	4	633	6217
1813	Preparation of printed forms and information activities	112	13	1	0	126	651
1814	Brochure-cover and decoration activities and related services	38	2	0	0	40	78
1820	Display records in distributors	23	0	0	0	23	26
	MUSEUMS, GALLERIES AND LIBRARIES	**225**	**296**	**42**	**1**	**564**	**10467**
9101	Library and archive activities	179	244	23	0	446	7276
9102	Museum activities	8	13	16	1	38	2286
9103	Activities for the preservation of historical sites and buildings, cultural monuments	38	39	3	0	80	905
	MUSIC, PERFORMING AND VISUAL ARTS	**578**	**201**	**199**	**5**	**983**	**25242**
5920	Sound recording and music publishing activities	77	1	0	0	78	115
8552	Cultural education	103	174	155	0	432	17108
9001	Performing arts	56	6	31	4	97	5016
9002	Support activities to performing arts	101	11	0	0	112	339
9003	Artistic creation	151	6	3	0	160	572
9004	Operation of arts facilities	90	3	10	1	104	2092

Crafts

Figure 9: Number of Creative Businesses in Crafts (2020)

[34] Whilst we do not cover this subsector in the below analysis, it has the higher number of businesses, making up 22% of creative industry businesses overall.



The data suggests that crafts is the smallest creative subsector in Uzbekistan, account for 0.6% of creative industry businesses and 0.2% of employees. There are no medium or large businesses, and again it is mostly made up of microbusinesses (93%).

Traditional crafts are a large component of Uzbekistan's cultural heritage and creative sector and is heavily supported by the Government (see Existing Policy and Programmes). For example, data from the Hunanarmand Association states that: [35]

- The Uzbekistan Government has supported the creation of 38,090 masters and 59,075 apprentices between 2017-2020.
- In both 2019 and 2020, the Uzbekistan Government provided $50 million in loans.
- In 2019, crafts contributed $15.2 million to the economy through exports (25% exhibitions, 45% tourism, 5% online sales and 25% contracts).
- Trade at the 34th Surajkund International Crafts Mela and International Folk Art Market produced $120,000 and $550,000 respectively.

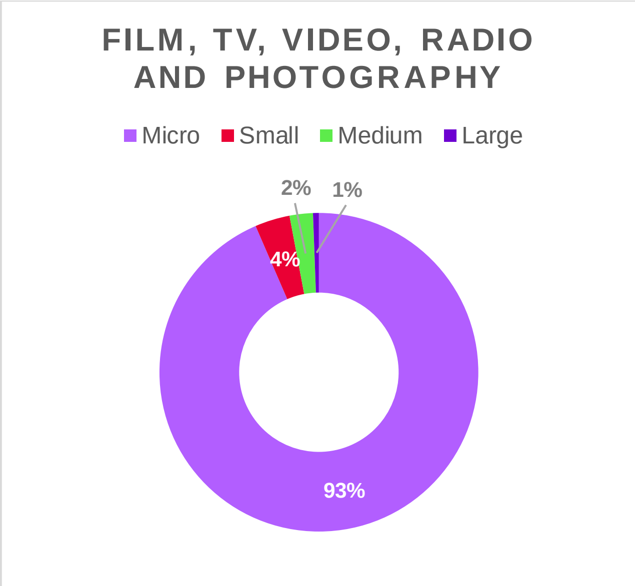
However, it is important to note that the DCMS classification only includes one subsector - 'Manufacture of jewellery and related articles' - which is may not capture all craft businesses and employment in Uzbekistan. Further research would be needed to ascertain this – it is possible for example, that these businesses may be recorded under heritage, tourism and manufacturing categories. As the key findings explain, this may also be due to incomplete data, if many businesses are not officially registered across the country.

Film, TV, Video, Radio and Photography

Figure 10: Number of Creative Businesses in Film, TV, Video, Radio and Photography

[35] Hunarmand Association (2021)

(2020)



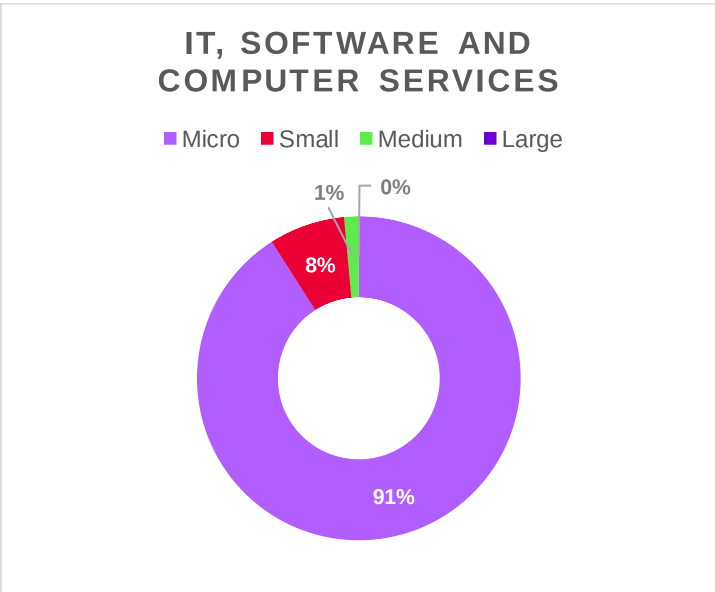
The film, TV, video, radio and photography subsector makes up 10.6% of all businesses in the creative industries. Again this is driven by microbusinesses (93%), but the sector also has a highest number of large businesses compared to other creative subsectors (4% / 6) with the majority from 'Television programming and broadcasting activities' (5) and only 1 from 'Radio broadcasting'. This is somewhat expected given the presence of the large national broadcaster, National Television and Radio Company of Uzbekistan, and its networks.

The subsector has 9.5% of employees in the creative industries, which is amongst the highest overall.

IT, Software and Computer Services

Figure 11: Number of Creative Businesses in IT, Software and Computer Services

(2020)

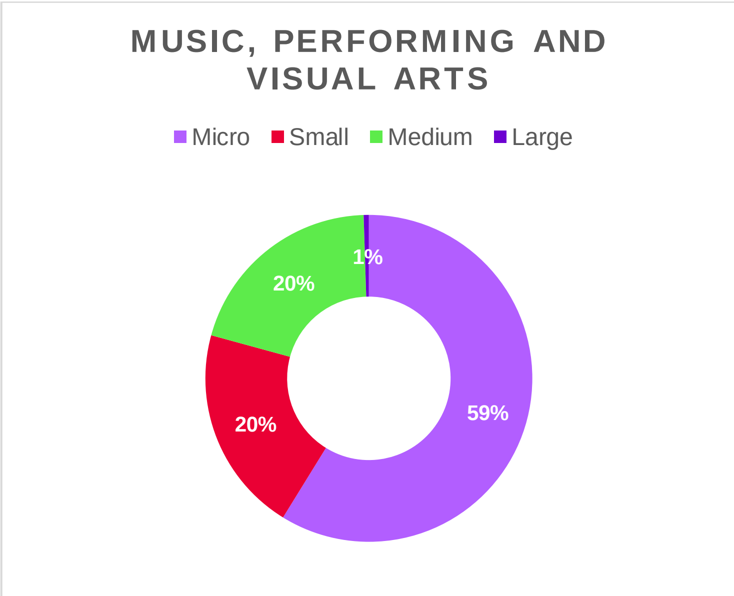


The IT, software and computer services subsector makes up 19.4% of businesses, again driven by microbusinesses (91%). There are no large-sized businesses.

‘Computer programming businesses’ is the largest subsector, with the highest number of businesses (813) and employees (3840).

Music, Performing and Visual Arts

Figure 12: Number of Creative Businesses in IT, Software and Computer Services (2020)



As shown in the above chart, the music, performing and visual arts sector has a smaller proportion of microbusinesses compared to other sectors (59%), and the highest proportion and number of medium businesses out of all the sectors (20% / 983).

It has the highest number of employees in the creative industries (30%), with most coming from the ‘cultural education’ subsector (67%). This can be attributed to the significance of formal and informal education provision in Uzbekistan, but further assessment is needed.

Business Questionnaire

To supplement our research, data gathering and focus group sessions, we asked 20 business owners to complete a short questionnaire on their status, their hopes and ambitions, and the main opportunities and challenges they were facing or expecting to face in the future. This was not a representative sample, so the results are illustrative only, but broadly align with findings from our wider research and engagement with the industry.

Sample

Our sample included arts and crafts businesses, media companies, designers, consultants and events promoters, most of which had five years business experience. The diversity of characteristics further represented a well-established and experienced group of entrepreneurs.

Six were sole traders and four said they hired staff on an occasional basis, while the remaining ten employed full or part-time staff on a permanent basis. Half of all businesses said they had operated for a least 10 years, belonged to a recognised trade body or association and traded internationally as well as Uzbekistan. Twelve businesses reported annual turnovers greater than $10,000 (USD). Seventeen businesses said they worked in partnership with other companies or entrepreneurs.

Results

The majority (seventeen out of twenty respondents) said they were growing or optimistic about their future prospects. This question by far received the most uniform response in the whole survey.

Nevertheless, it contrasted the more mixed responses to the important of creative businesses in Uzbekistan in the future. Whilst some also expressed positivity, others suggested a decline without further support (from self-organisation in the sector to government initiatives) and through issues with consumer behaviours (inexpensive mass production).

When asked about their perceived opportunities and challenges in the future, the majority chose to interpret this as an opportunity to talk about the barriers they faced. These ranged from predictable frustrations with regulatory bureaucracy and the tax system to a need for greater government support for the arts, difficulties in accessing skilled staff, the need for audience and market development and the lack of supportive institutions, formal or informal, for the sector.

Other observed challenges included:

- Raising finance was a significant issue, with only five reporting no substantial difficulty. Only two described their main source of finance as banks, another five used banks but augmented by friends and family, whilst ten relied exclusively on friends and family or their own resources for investment. Two were mainly reliant on State funding or grants.
- On access to good market information, seven respondents said they found it relatively easy, three described it as difficult and, unsurprisingly, several said they understood the domestic market in Uzbekistan but found it difficult to obtain good intelligence about international markets.
- On the ability find and employ suitably qualified staff. Eight reported no difficulty whilst the other twelve reported varying levels of difficulty from “not too bad” to “it is easier to fly to Mars.”

Key Findings and Recommendations;

This section presents the findings from the desk-based review and stakeholder engagement. It reveals a number of strengths in Uzbekistan's creative and cultural sectors and in turn a solid foundation for growth if the following issues are addressed, and opportunities capitalised on. These are both cross-sector and industry-specific.

Better Data

The Creative Industries are now widely recognised as a major and growing part of the global economy. It is estimated that, before the COVID-19 pandemic, the sector was contributing some 3% of global GDP and 30 million jobs worldwide, whilst employing more young people (30 and under) than any other sector. A 2018 UNESCO report also predicted that the sector could grow to 10% of global GDP in the medium term.[36]

In Uzbekistan, the Government has increasingly recognised the economic and cultural importance of creative sectors. As illustrated in the 'Existing Policies and Programmes' section, there have been a number of specific initiatives introduced in recent years to support the growth and profile of key parts of the creative sector in Uzbekistan. This has included specific support for key heritage sectors such as traditional handicrafts, pottery, and folk arts, and for more contemporary forms including film and TV production.

However, to date, there is limited recognition of the Creative Industries as a coherent strategic entity, either in policymaking or within the creative sectors themselves. Clear data is a vital precondition to an industry-wide approach, providing a reliable baseline from which to plan and a clear means of tracking progress in terms of growth and development of the sector. As outlined in the methodology, the process for this project included submitting a detailed data request to the State Statistical Committee, which would enable the construction of a detailed map of the creative industries in Uzbekistan. As set in detail in the previous section, we received some useful data, particularly on business and employee numbers across the sector which, in some measure, suggests that creative industries have a substantial presence in the domestic economy with potential for further growth. However, based on the response it was evident that the current data was insufficient for accurately mapping the sector to inform strategy development.

A Way Forward

To enable the development of a more detailed and comprehensive map of the creative industries in Uzbekistan, we recommend the development of a Data Improvement Plan, identifying practical and realistic steps which can be taken to meet this over the short-to-medium term. This would enable a more joined-up and holistic approach to the development of the sector. We have identified three key areas which such a plan could look to address.

1) **Definition:** The Government, in consultation with industry, should adopt a single definition of the Creative Industries based on the types of businesses used internationally (by ISIC/NACE

[36] The Economist (2021)

codes) which would be covered in future data gathering. As previously mentioned, there is no single global definition of the creative industries but a high degree of consistency in statistical frameworks taken by different countries. These frameworks, such as the UK/DCMS, UNESCO and UNCTAD, should be used as reference points for consistency and comparison.

2) **Reliability**: We have been told anecdotally – by a number of sources engaged in the course of this project – that official statistics are likely to significantly underestimate the true size of the creative industries in Uzbekistan. This is thought to be an outcome of creative businesses not being officially registered across the country and it has been suggested that this could be the case for more than 50%. The data we obtained has been insufficient to test this specific assumption, although numbers of enterprises listed in some areas such as crafts appear to be very low. It is also likely that the size of the workforce is significantly underestimated assuming that, as in other countries, a significant proportion of the workforce in the sector are freelance. The extent of under-reporting should become clearer as the range and detail of data collected improves and the profile of the sector increases, and we recommend that the position should be kept under review.

3) **Coverage:** The Data Improvement Plan should identify and prioritise the key datasets needed to inform future policy development for the creative industries. This includes, for example, Higher Education policy, especially when considering the financial autonomy of universities. In line with our wider findings in this report, it is recommended that these should include as a minimum:
   i) **Economic Output** – value generated by each creative subsector (e.g. GVA).
   ii) **Geography –** regional distribution by subsector, value and jobs to provide a clear picture of distinctions and disparities between regions.
   iii) **International Trade** – volume of exports by subsector and identification of the biggest international markets for each.
   iv) **Workforce -** in additional to overall employment figures, it is beneficial to understand the diversity of the creative industries workforce (by gender, socioeconomic background for example) and the numbers of self-employed freelancers and entrepreneurs working in the creative industries.

Traditional & Contemporary

Uzbekistan has a strong and vibrant cultural life and a rich cultural heritage which, in turn, provides the basis for a tourism sector that is experiencing rapid growth, and which is seen by the government as a significant part of the country’s future economy. This combination of social and economic factors means that traditional arts and crafts – particularly silk fabrics, traditional garments, carpets, and ceramics - are central to any understanding of the creative industries and are actively supported by public policy and public funding as previous shown.

However, this view of arts and crafts as key elements of national heritage, coupled with a prevailing soviet-era legacy which sees culture as a field for State-funding, State-control and uncontroversial celebration of the past, means that a more comprehensive perception of traditional cultural forms of expression, as just one part of a wider creative industries, struggles to be accepted. For example, the games developers and ‘creative techies’ of Tashkent are not considered to belong to the same sector as the carpet weavers of Samarkand, whilst the potential benefits of seeing connections between the two – from any angle of government policy or for any advantage to the national economy – remain unobvious to the Uzbekistan government.

Firstly, we interviewed creative practitioners in Samarkand with a focus on the tourist market, and secondly entertainment, media and digital businesses in Tashkent with a focus on the young, well-education 'metro' youth market, as well as international markets. We examined two cities in an effort to capture the issues from both ends of this spectrum.

The craft workers of Samarkand have enjoyed considerable and growing success. In addition to a strong cultural and emotional commitment to sustaining traditional work practices and the use of traditional materials, they recognise the added production value for buyers and, in most cases, gives them strong credentials in environmental sustainability.

The government recognises that this commitment to traditional practice is good for the consumer, but that it may not be as attractive to a new generation of workers who will have to sustain it and therefore provides financial support for training and apprenticeships. In terms of exports, small manufacturers can claim export tax exemption on sales of up to $5,000 (USD) and the Uzbekistan government has charged all its embassies to develop opportunities to promote and facilitate Uzbekistan crafts, as well as promoting the country as a tourist destination as previously shown. For example, one carpet maker who employed 200 people explained that 90% of his output was directed to international customers and that he had every confidence this market would grow. Nevertheless, the Chair of the Hunarmand Association (local Crafts masters') went on to explain that exports to certain international markets, notably the USA, EU and Japan, were hampered by complex visa and trade issues.

Overall, the focus groups revealed a generally positive view of the crafts sector and its future which is supported by earlier research by the British Council in Uzbekistan. Below are two extracts from the 'Crafting Futures' study which were used to inform pilot activities to develop the sector:

> On preserving and documenting contemporary and past knowledge: *"We witnessed a significant commitment to archiving and learning from Uzbekistan's craft history and traditions, uncovering the history of craft that had been hidden during the Soviet era. This was especially true of the Ceramics Masters who we visited; many had libraries as well as examples of pottery dating back several centuries and there was a real desire to locate craft within its historical context."*[37]
>
> On Sustainability: *"We found that there are quite few a textile craft-makers that are working with natural materials and natural dyes, which are attractive for Western markets, however, these sustainable practices are not properly supported by business models or marketing strategies."*[38]

Conversations with creative professionals in Tashkent revealed very different issues and prospects. The people we spoke with, many of them members of an unofficial 40-strong association of events and festival promoters, overall had limited expectations from government. There were common observations around the scope for a closer, more consistent understanding with the Culture Ministry which could, for example, help to reduce administrative

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[37] University of Leicester and Royal College of Art (2019) Pg.2
[38] Ibid. Pg. 6

difficulties in licencing live events which sometimes arose from a lack of detailed knowledge of the nature of the business. More significantly, promoters in music, theatre and multi-media encountered difficulties in finding staff with the necessary production and management skills, or people who understood the potential opportunities and challenges of inviting international acts to Uzbekistan or in taking their own acts abroad, including whether they were of a high enough calibre and quality.

Nevertheless, the overwhelming concern was the need for audience development (see International Markets and Tourism for further) and we understood that whilst this primarily meant individual consumers, it also included public officials in government and higher education who had not yet appreciated how a broader appreciation of the creative industries and its supporting skills could benefit the country's economy and international image. Many of our respondents pointed out a sharp distinction between Tashkent, the large capital city with its well-education, internet-savvy, internationally oriented youth population, and the rest of the country.

With regard to media, our discussion with film industry stakeholders suggested a more confident and productive relationship with government, which is based, in part, on a long and successful history of production, though mainly for the domestic market. The potential for Uzbekistan to attract inward investment was also mentioned, but here too the need for business and management skills, for high-end digital skills in areas such as special effects, for an understanding of international markets and for script and concept development for filmmakers, TV and games developers; all of these were seen as problems for future growth.

A Way Forward

Working with government to improve data and mapping (ensuring alignment with relevant SIC and SOC codes), coupled with work in the higher education sector to grow entrepreneurship and business skills (with the 'Creative Spark' programme as a valuable part of that process) will help Uzbekistan's creative entrepreneurs become a more effective and visible part of the country's potential – economic or otherwise.

Above all, it could help bring these two diverse elements into a more effective partnership: the traditional craft makers embracing the online world for their marketing, and the digital entrepreneurs finding ways of developing distinctly Uzbekistan stories that would also have salience in international markets. As 'stories' become increasingly central to effective marketing campaigns, especially in the online and social media world, Uzbekistan has a wealth of untold and captivating stories that are unique to its own culture and to the wider culture of Central Asia.

However, there may be some cultural issues that need to be identified and resolved before such an approach is universally accepted. We were told that the craft museum in Tashkent had installed traditional potters and jewellers to work in a yurt in the museum grounds and whilst this had proved more popular with tourists than much of the museum's content, a new Museum Director felt it failed to give the country a sufficient contemporary image and the yurt was closed.

Geographical Issues

We refer above to the marked differences between the creative sector in Tashkent, as the capital city of Uzbekistan, and a city such as Samarkand. There are other significant regions or cities with a strong tradition of arts and crafts manufacture, such as the Ferghana Valley and growing tourist centres such as Bokhara, Khiva and Nukus. We were told that some regional administrations provide export assistance to tourist-oriented craft businesses, but to the extent that we were able to investigate, and given the limited official data, there appears to be no significant centres for the more 'contemporary' elements of creative production – games, film and TV, recorded music, contemporary fashion, marketing and advertising – outside Tashkent. One festival promoter believed only 5% of the population outside Tashkent attended arts or cultural events.

However this landscape is changing, in part through State-sponsored initiatives designed to support technology and innovation. This includes thirteen regional IT parks which are open or in the process of preparation which are intended to become business incubators and accelerators. Our engagement and desk research also revealed at least a hundred fairs, festivals, markets and other events that celebrate the arts and creativity across the country each year. A privately sponsored creative hub in Tashkent also features music, fashion, marketing and branding courses as well as lectures and seminars on creative disciplines.

More significantly, online access is increasing across the country. In January 2021, an estimated 55.2% of households were online and 69.2% had access to mobile devices. Social media users grew by an impressive 44% between 2020 and the end of 2021, a shift naturally accelerated by the pandemic and its associated lockdowns. 40% of Uzbekistan's population is under the age of 25 and as education levels and internet penetration both increase, there will undoubtedly be a growing number of young people with an interest and ambition in the creative industries. During the focus group sessions, we heard about an art exhibition held in what was described as a 'remote and mountainous region', which had attracted a great deal of interest from the local young people. In Uzbekistan, as elsewhere, it seems that talent is everywhere, but opportunity is not and particularly so in rural areas.

A Way Forward

As previously mentioned, a clearer and more inclusive definition of the creative industries coupled with better data collection, would reveal unexpected clusters of creative businesses and creative entrepreneurs (both formal and informal). This would make it easier for government or other agencies to provide appropriate support.

Due to limited information and time, we have not been able to build a clear enough understanding of the relationship between local, regional and national levels of administration to make any solid observations on a way forward. However, it is reasonable to assume that greater government engagement in this field and at all levels, could help stimulate the growth of networks of creative workers, whether constituted as informal trade associations as seen with the Tashkent events industry or, more formally through agencies such as the Arts & Culture Foundation with its close links to the Ministry of Culture.

A further major factor in geographical disparities is access to skills and training, described elsewhere in this report. Government support for apprenticeships and internships in the craft sector is already having an impact, alleviating concerns amongst many craft makers on the future of their business and wider crafting tradition. In time, this process may in itself assist the growth of specialist hubs and clusters in the craft sectors. However, the lack of formal courses addressing issues of entrepreneurship, business skills, management and production skills, specific areas of digital technology and audience development, coupled with relatively low appreciation of the value of IP and how to protect it, holds back the growth of the creative industries across the country, but especially outside Tashkent.

Related to the need for skills development is the issue of ambition. We were not able to investigate the extent to which creative and cultural disciplines form an accepted part of the school curriculum at primary or secondary level, but greater government recognition for the significance of the creative and cultural sector coupled with growing access to the online world, is likely to encourage more young people to view the creative industries as a possible future career. As well as the formal education curriculum, festivals, exhibitions, trade associations and public media could all have a role in accelerating this trend.

Institutional Structures and Regulation

The Uzbekistan government has supported a number of organisations which work to develop key sectors within the creative industries. Examples of these include:

- The Arts and Culture Development Foundation (ACDF), which funds and promotes activities and institutions across the cultural sector, including the performing arts, museums and galleries.
- The national film agency, Uzbekkino, which supports the development of the film industry, funds indigenous film production and issues permits for filming in Uzbekistan by foreign companies.
- The Hunarmand Association – a public body which works to support and develop traditional arts and crafts of Uzbekistan, through coordination of the craftspeople and artisans in its membership, promoting their products and supporting training in the skills and knowledge needed to sustain these activities.

As described earlier, there have been several specific initiatives to support aspects of industry development. These are often run in partnership with international bodies such as the British Council and Swiss Agency for Development and Cooperation. These forms of support are highly welcomed by professionals in the sector who benefit and are generally seen as having an important role in the sustaining and building the creative industries in Uzbekistan. However, stakeholders also identified a number of areas where current regulation is perceived as creating barriers to development, and/or where there are potential opportunities for reforms which could make it easier for businesses to fulfil their commercial and creative potential. Some of these have already been recognised by government.

Key issues for potential consideration include:

- **Bureaucracy**: Whilst the Government is generally seen to be supportive of the creative industries, concerns remain over the administrative procedures required to access support or secure permissions. They are perceived as complex and difficult to navigate, causing delays and sometimes cancellation of planned projects. For example, obtaining the necessary licences and permissions to organise live events and/or the complexity of funding applications and decision-making systems. The involvement of multiple authorities, sometimes at both regional and national level, was a common reason, however stakeholders also noted that there had been some improvements recently (for example in security requirements for events), but that there is scope for further review and simplification.

- **Intellectual Property Protection:** The creation and exploitation of intellectual property (IP), particularly copyright, is fundamental to the commercial development and success of creative businesses across the sector. There is a legal framework for IP protection, which has been incrementally strengthened – for example via Uzbekistan's accession to World Intellectual Property Organisation treaties –, some specific support in IP protection provided to film and TV producers, as well as a public association which acts as a collection society for rights owners. However, it was suggested that there remains substantial scope for the IP protection framework to be improved in order to meet international standards on best practice. Stakeholder concerns were as much about enforcement as about the rules themselves – it was argued that current laws in some areas were not consistently followed, and more effective enforcement of the existing legislation could bring significant improvements and benefits to the creative industries.
- **Financial Incentives and Clarity:** The Government has introduced some important fiscal measures to help enable creative businesses and entrepreneurs to achieve sustainable growth. This includes specific tax incentives for those running traditional crafts businesses as members of Hunarmand and a 20% rebate to encourage international film makers to locate production activity in Uzbekistan. Stakeholders suggested that a broader system of incentives could play a key role in developing other parts of the sector and creative industries. There are a number of international models s which could be investigated including, for example, incentives in the UK to encourage sustainable growth of indigenous film, TV and video production businesses.

Aside from these measures, financial support mechanisms for the creative sector typically take the form of direct grants. We were told that new entrants and early–stake businesses often struggle to find ways to commercially monetise their product, which is partly a skills-related issue (see Skills Development below) but also an outcome of the perceived lack of clarity in the legal and contractual frameworks governing business transactions. For example, around how creative products should be valued and mechanisms for ensuring that creators are able to secure fair remuneration for the commercial exploitation of their creations, particularly where content creators are seeking online distribution of their products.

A Way Forward

The creative industries are comprised of a diverse range of subsectors, with varying profiles, challenges and interests. However, there are many common issues as described above and in other parts of this report. Based on our extensive discussions with those working in and with the creative sectors in Uzbekistan, we see strong potential for industry and government to work in partnership in order to investigate and address the broad opportunities and challenges for the creative industries as a whole.

We therefore recommend that consideration is given to establishing a joint government-industry forum, bringing together industry leaders and senior policymakers to develop a shared strategy for the future of the sector. There are a number of models which have been adopted in other countries including, for example, the Creative Industries Council in the UK which led among other things to the agreement of a landmark "Sector Deal" for Creative Industries in 2018; and the recently established Creative Industries Federation in Azerbaijan

Skills Development

All of the creative industry subsectors have a critical reliance on specialist creative skills and talent. Measures aimed at securing a sustainable talent pipeline are likely to be a key part of any strategy for the development of the sector in Uzbekistan, or in any other country around the world. The Uzbekistan government has provided bespoke support for skills development in specific areas, including for apprenticeship training in traditional handicrafts as well as training for creative and technical workers in the film industry. This sits alongside several initiatives developed and implemented with international partners, such as the British Council's Creative Spark programme which has supported 10 new partnerships between UK universities and Uzbekistan institutions, with a particular focus on the development of entrepreneurship and enterprise skills.

The engagement and research undertaken in this project identified two specific opportunity areas with potential for further development:

- **Entry Routes**: Stakeholders explained that entry routes into many parts of the creative industries are currently unclear, which means that young people in particular are not necessarily aware of the career opportunities that the creative industries can offer or how to take advantage of them. In the traditional craft sectors, it can take many years to develop the highly specialist skills artisans require and, as outlined in the Crafting Futures report, the primary focus remains on "inter-generational transfer of craft knowledge" via apprenticeships, with only some increase in formal education provision more recently.[39] The Crafting Futures report went on to identify a tension between the economic pressures to move to faster training methods and the need to avoid diluting expertise. We were told that there had historically been a shortage of trainees entering the sector, and that incentives had been introduced in the form of financial stipends for trainees and subsidies for Masters to take on groups of students.

  There is a perception that pathways into the creative industries more widely are often via "informal" routes – for example via friends and family - which can restrict opportunities and equitable access for those without existing connections to the sector. Stakeholders also highlighted a lack of awareness for the breadth of roles needed to ensure maximum success, which may lead to the sector being overlooked by professionals with critical skills beyond the classic creative occupations; for example, a content business requiring business analysts, project managers and finance professionals as well as creators.

[39] University of Leicester and Royal College of Art (2019) Pg.4

- **Business Skills**: The future development of the sector was understood to be contingent on the development of business skills and opportunities. Uzbekistan is producing talented young people with strong creative skills but identifying ways to monetise creative products continues to be a challenge. As in many other countries, the creative industries are mostly composed of micro/small businesses, including individual creators, who can find it particularly difficult to secure enough revenue to make a living. This issue is likely to be an outcome of the level of business support and sources of investment noted elsewhere in this report.

  Stakeholders also expressed the need to improve the integration of business, marketing and management skills into the education and training courses which feed into the creative industries. This would ensure that new entrants – particularly those looking to set up their own companies - are better equipped to develop and pursue commercial business plans and attract investment.

A Way Forward

Possible options for addressing entry routes could include a clearer mapping into each of the creative sectors, and the range of potential opportunities involved. This could be developed into a useful and accessible resource for school and university students, alongside a joint industry-Government communications programme to inform and inspire young people about opportunities in the creative sectors. Consideration could also be given to extending financial incentives to other parts of the creative industries seen to be at risk of potential skills and talent shortages.

On business skills, Stronger and broader peer networks across the sector could also help through spreading experience and best practice. The international partnerships developed through the ***Creative Spark Programme***, have been focused specifically on development in their enterprise and entrepreneurship skills, so it may be helpful for industry and Government to consider how best to build on the experience and evidence gained through that programme.

Finance & Investment

Investment in Uzbekistan’s creative industries is both helped and hindered by the soviet legacy of significant public subsidy and control of cultural activity. Consequently, a large proportion of cultural activity is not seen as part of the creative industries and many creative enterprises which operate commercially are not regarded as legitimate cultural activities. Mixed public/private initiatives are not a feature of the funding landscape and there are suspicions over covers for corruption. This sharp distinction between commercial and non-commercial generates obvious problems, particularly for a sector that does not easily fit into any of the conventional silos of departmental thinking in government.

As noted elsewhere in this report, there is public funding for some traditional arts and crafts businesses such as training and apprenticeship subsidies and tax concessions. There is also a National Cinematography Fund and a 100% publicly financed Film Fund, launched recently, that supports film development, production and distribution of feature films and some documentaries – though this support seems to come on the basis of perceived artistic merit and ambition, rather than as investment in a potentially commercially successful product. As described elsewhere, there are also a range of international support funds for sector development with stakeholders often referring to the Swiss International Corporation.

There are substantial funds available to support research and development, and start-ups through the Ministry of Innovation, although our conversations with creative entrepreneurs suggested that these funds are fundamentally geared towards tech businesses rather than creative businesses, with significant bureaucratic administrative processes. Nevertheless, the fund exists and does support innovative digital and tech businesses, with further support in the form of IT parks (see Geographical Issues) and publicly funded incubators and business accelerators. Although this cannot be verified, we were told that there is growing Chinese investment into IT businesses in the Ferghana Valley, in response to the availability of relatively cheap but skilled labour. While this might prove to be a transitional phase in the growth of a digital sector, it may prove short-lived and of limited benefit as other countries in the region are seeking to attract foreign investment on a similar basis.

These support initiatives are valuable, but are almost wholly limited to grants, subsidies, tax incentives and, in the case of the international agencies, support for training and skills. There appears to be little relationship between the commercial financial sector and the creative sector domestically and, while there is a natural and widespread interest in attracting foreign investment, the lack of data as well as business and marketing skills in the creative sector hinders Uzbekistan in becoming an obvious market for international investors in the arts, entertainment or craft sectors.

Our business survey respondents almost entirely expressed optimism about the future, with around half trading internationally. Nevertheless, they also highlighted limitations which are common to creative businesses elsewhere; only five said they turned to banks for finance, six reported difficulties in raising finance and eight said they had difficulty in accessing reliable market information. Several of the respondents in our focus groups also talked about the need for soft loans and for a longer-term strategic perspective from potential investors.

A Way Forward

As for so many other aspects of the creative sector, better data, higher-level business skills, easier access to international market information and business practice would all help to build a more welcoming and secure environment for commercial investment.

There are also further opportunities to be explored with UN agencies such as the UNDP which support a variety of initiatives, as well as several government subsidies or exchange and skills development programmes in IT and tech-related skills. Samarkand's status as a UNESCO City of Heritage will give it some profile with international investors and funders.

More specific recommendations for future action are:

- **Stimulating domestic investment:** With its long history of State support for culture, and with existing initiatives such as the Institute for Arts and Culture in Tashkent, an easy step for the government would be to establish an intermediate organisation with the specialist skills to channel public money to creative businesses in the form of soft loans or equity investment. This would give confidence to commercial investors, helping raise the standard of business skills by tying investment to business support, and giving government a better view of the opportunities and challenges that face the sector overall. There are existing successful models for such public agencies in a number of countries in Asia, Africa and Europe.

- **Stimulating international business:** Whilst there are already many festivals, trade fairs and the requirement on Uzbekistan embassies to support international trade, there are further ways to encourage Uzbek creative entrepreneurs to explore foreign markets. For example, by supporting visits to international markets, supporting entries to/hosting of international competitions, and promoting Uzbek brands abroad. Foreign investment into the creative sector could also be increased by integrating strategies for arts and crafts with the development of the tourist sector, with useful models in other countries where responsibility for tourism and creative industries have been brought together in a single department or Ministry.

International Markets and Tourism

Tashkent is the largest city in Central Asia and Uzbekistan has the largest population of any of the region's republics. These factors contribute to a regional rather than narrowly national view of many markets, which is another legacy from the soviet era with its border-free access between member States. More recently, government and the business community have grasped the potential of an untapped international tourist market, the consequent need to project a particular image of the country internationally, and an eagerness to learn from and engage with international markets outside the former Soviet Union. Uzbekistan is not alone in seeing this potential, making it a point of increasing competition across the region. As a Dutch research report observed:

> *"Cultural tourism has played an important role in the region's social and economic development. Research conducted in 2012 showed that the tourism sectors of Azerbaijan, Kyrgyzstan, Kazakhstan, Uzbekistan and Belarus are among the top 10 most rapidly growing in the world."*[40]

As noted elsewhere in this report, government support for the creative sector focuses on the traditional arts and crafts market (mainly commodities), but also live performance such as music and some more culturally bespoke activities such as flying birds of prey (hugely popular with visitors from the Middle East) which are key to attracting international visitors. However this ambition comes with many challenges. The commitment to traditional materials and work practices means production volumes are often low. A carpet maker in Samarkand emphasised this point by telling us that some carpets take years to complete. To increase the speed of production would threaten the quality, a point also made in 'Crafting Futures':

> On the balance between heritage and tourism: *"A number of the workshops we visited opened their doors to tourism whilst operating as fully functioning craft manufacturing spaces. Many of those who do this reported that they could easily fill their diaries with more tourist visitors but were concerned that they must protect the time they have to concentrate on their craft. At a broader scale this debate was played out between the ministries we visited with the Tourism Officials / Mayor's Office being keenly aware of the*

[40] UNESCO (2016)

potential for more tourism based around craft (especially in Bukhara and Kokand), whilst the Culture Ministry and Academy of Arts were concerned about the potential impact on quality. There is also a very strong sense of connection between food as cultural heritage and craft, which has not been exploited yet in the touristic offer nor in the research practices. Pilot: work with sustainable business models for tourism development and create a networked system integrating sustainable development of eno-gastronomic tourism and craft."[41]

Closely related to the issue of quality is an issue of design. Should traditional craft makers seek to accommodate designs that might be more acceptable and popular with international buyers, or would this dimmish the distinctiveness and therefore the commercial value of the products? Another issue concerns platforming small makers in global markets and consideration has been given to new ways of branding and marketing work, including the requirement of Uzbekistan embassies and trade houses previously mentioned.

The idea of international showcasing extends beyond the traditional crafts. One entrepreneur told us of a privately organised festival that provided a platform for fashion designers, musicians and chefs to promote themselves to international audiences. With recently introduced tax and customs concessions for traditional arts and crafts, demand is growing for these concessions to be extended to a wider range of creative professionals, including individual artists. As noted elsewhere, regional administrations had offered export support whilst a promotional magazine, "Visit Uzbekistan", has run to more than 30 editions over the last four years, with the most recent appearing in Chinese ahead of the Winter Olympics, as well as other languages.

All of these initiatives, regardless of their effectiveness, will have more recently been overshadowed by the lingering effects of the pandemic, rising fuel costs, Russia's invasion of Ukraine, and the extent to which global commitments to carbon reduction will have permanent impacts on the tourist market.

Business & Audience Development

Alongside the need to develop business skills in the creative industries, several stakeholders raised the need for a greater focus on audience development and in particular, the need to generate demand and extend the reach of creative content to audiences outside Tashkent. This issue was profound amongst those running newer businesses which create contemporary content, including audio-visual and music. It was suggested that audience levels were low for domestically produced content and contemporary arts, and that more support and coordination in promoting these products would be needed to increase engagement. The government provides substantial support for programme making and performing arts such as theatre, which is understood to be culturally significant. However, there is also a perception that state funding brings with it a range of requirements including editorial constraints, and that enabling growth and sustainability of production businesses independent of government funding, is vital to developing the range and variety of content needed to reach all audiences in Uzbekistan, as well as to compete internationally.

[41] University of Leicester and Royal College of Art (2019) Pg.7-8.

As well as live events, online promotion – and retail – was recognised as an important route to consumers for all creative sectors, particularly as online access via broadband and mobile increases across the country (see Geographical Issues). It will be increasingly important in the future to ensure a supply of entrants into the creative industries with the necessary knowledge and skills to build an online presence that can effectively reach and engage audiences. The content-based industries in particular, such as TV, film, games and music, are seeing their business models constantly disrupted and transformed worldwide by the growth of online, on-demand consumption. But the online space is an increasingly important route to market for the traditional arts too, for both promotion and direct sales, and those sectors have great stories to tell - for example, around their methods, materials and sustainable products and practices – which could form an important element in the promotion and image of Uzbekistan's creative industries internationally. There should be scope for all parts of the creative sector to work together and particularly with those already operating in the digital space to help build an online presence and profile, possibly through leveraging existing hubs and networks such as the regional IT Parks mentioned earlier.

Government support for the creative industries is welcomed and we have described above the case for a standing Government-Industry forum. However, stakeholders also suggested that the creative industries should develop their own networks for collaboration and partnership in areas of mutual interest. There are a number of existing groups around areas such as architecture and live event operators, but we understand that these are mostly informal networks based on social media groups and therefore lack formal remits or structures. Consideration could be given to encouraging the development of industry-led bodies who could promote and coordinate action and mutual support in some of the areas of common interest identified in our discussions. Such bodies could also help to develop international links with similar industry-led organisations in other countries, helping to raise the international profile of Uzbekistan's creative industries and boost trade and cooperation in key international markets.

A Way Forward

There is potential for the government and the creative sector to collectively develop a way for telling the story of Uzbekistan internationally. As was noted previously on the tension between traditional expressions of creativity in arts and crafts and more contemporary expressions in film, performing arts and media, 'stories' are an increasingly powerful element in all marketing and Uzbekistan has unique stories to tell about its history, its tangible heritage in the form of architecture, arts and crafts and its intangible heritage in the form of sports, music and activities. The strategies of the Korean government over the last 20 years have demonstrated how effective this can be in promoting a nation's economy and international profile, regardless of its impact on tourism numbers.

Conclusions and Recommendations

With the limitations in data our conclusions are necessarily tentative, but from our discussions and analysis a clear picture has emerged of a country with a vast resource of creative talent, a rich cultural heritage and a government that embraces the potential of the creative sector as a driver for future growth. If we were to identify three top-line recommendations for future action, they would be:

- The need for more comprehensive mapping of creative business activity across the country and the data that would underpin it.
- The need for business skills, including entrepreneurship, producing, brokering, marketing and business development.
- The need for more systematic co-operation between industry and government.

In more detail, we divide our conclusions into three components.

Policy Issues

- A definition of what is meant by the 'creative industries' agreed/adopted by the Uzbekistan government, that reflects the reality of activity and priorities of the country but, insofar as possible, is congruent with agreed international definitions.
- More comprehensive data to capture the activities in the various industries that make up the creative sector, including their contribution to GVA, their regional dispersal, their international profile and the composition of the workforce and its skills.
- A forum in which government and representatives of the creative industries can discuss opportunities and challenges. There are many examples of good practice from around the world to provide a template for such an initiative.
- A better analysis of the critical skills needs in the sector going forward and better career information for young people who may be attracted to a career in the creative industries.
- Better integration between national, regional and local administrative structures to assist the growth of distinctive hubs and clusters that reflect the strength and traditions of different regions and cities.

Business Issues

- Greater investment in business and entrepreneurship skills.
- Better targeted fiscal incentives for creative business, especially micros and small-medium enterprises.
- The development of commercial investment, whether through debt or equity finance, rather than the current over-reliance on public grants and subsidies. In this context a

publicly funded ‘intermediary organisation’ to channel investment to independent creative businesses and offer business support, has proven to be an invaluable asset in growing the sector in many countries.

- Improving and strengthening the IP framework and promoting better understanding of the importance of IP in the creative business community.
- Support for entrepreneurs and businesses seeking access to international markets and trade fairs, matched with the support services and information necessary to stimulate inward investment for the creative sector.
- A focus on audience development, looking at the demand-side of the creative industries, not just the supply-side

For industry

- Develop trade associations and support networks, both formal and informal, that can provide mutual support to creative professionals and are able to represent particular trades, regions or sub-sectors (for example, freelancers, micro-businesses) to government at local, regional and national level.
- Work with government and with international agencies in supporting creative entrepreneurs and businesses to better understand international market opportunities and build links with investors elsewhere in Central Asia, and globally.
- Encourage traditional arts and crafts makers to embrace the digital world, as a means of marketing, of generating international interest in Uzbekistan’s cultural heritage, and as a means of managing their businesses more effectively.

Appendices

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Uzbekistan Creative Industries Statistical Codes

The table below outlines the statistical codes relevant to the creative industries in Uzbekistan, based on the DCMS classification. Those highlighted in yellow were excluded from the analysis due to concerns over inaccurate reporting (i.e. where other industries irrelevant to the creative industries are counted).

Table 2 Classifiers of Types of Economic Activity (OKED REV.2 / SIC Codes)

Raz-del	Group-pa	Class	Name
SECTION C: MANUFACTURING			
18			Print and Playback of Recorded Materials
	18.1		Printing and related services

		18.11	Printing newspapers
		18.12	Other printing activities
		18.13	Production of printing plates and information activities
		18.14	Binding and finishing activities and related services
	18.2		Playback of recordings from media
		18.20	Playback of recordings from media
SECTION J: INFORMATION & COMMUNICATION			
32			Production of Other Finished Products
	32.1		Production of jewellery, costume jewellery and similar products
		32.12	Manufacture of jewellery and similar products
58			Publishing
	58.1		Publication of books, periodicals and other types of publishing activities
		58.11	Publication of books
		58.12	Publication of reference books and lists
		58.13	Newspaper publication
		58.14	Publication of journals and periodicals
		58.19	Other publishing activities
		58.21	Extracting computer games
		58. 29	Release other software
59			Production of Film and Video Films, Television Programmes, Phonograms and Music
	59.1		Production of films, videos and television programs
		59.11	Production of films, videos and television programs
		59.12	Post-production stage of production of film and video films, and television programs
		59.13	Distribution of motion pictures, videos and television programs
		59.14	Film screenings
	59.2		Phonogram publishing activities and music recordings
		59.20	Phonogram publishing activities and music recordings
60			Programming and Broadcasting
	60.1		Broadcasting
		60.10	Broadcasting
	60.2		Television production and broadcasting activities

		60.20	Television production and broadcasting activities
62			Computer Programming, Consultancy and Other Related Services
	62.0		Computer programming, consultancy and other related services
		62.01	Computer programming activities
		62.02	Consulting services in the field of computer technology
63			Information Services Activities
	63.1		Data hosting and processing services, Web-portals
		63.12	Web portals
	63.9		Other types of information services
		63.91	Activities of news agencies
		63.99	Other information services activities not included in other categories
SECTION M: PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES			
70			Activities of Parent Companies; Management Consultancy
	70.2		Management consultancy
		70.21	Public Relations and Communication Activities
71			Activities in the Field of Architecture, Engineering, Technical Testing and Analysis
	71.1		Activities in the field of architecture, engineering surveys and provision of technical advice in these areas
		71.11	Architectural activities
73			Advertising Activities and Market Research
	73.1		Advertising
		73.11	Advertising Agencies
		73.12	Provision of advertising in the media
74			Other Professional, Scientific and Technical Activities
	74.1		Specialised design activity
		74.10	Specialised design activity
	74.2		Photography activities
		74.20	Photography activities
SECTION P: EDUCATION			
85			Education
	85.5		Other types of education
		85.52	Cultural education

SECTION R: ARTS, ENTERTAINMENT & RECREATION			
90			Activities in the Field of Creativity, Arts and Entertainment
	90.0		Activities in the field of creativity, art and entertainment
		90.01	Theatrical activity
		90.02	Technical support for performances
		90.03	Arts activities
		90.04	Activities of theatre and concert halls
91			Activities of Libraries, Archives, Museums and Other Cultural Institutions
	91.0		Activities of libraries, archives, museums and other cultural institutions
		91.01	Activities of libraries and archives
		91.02	Activities of museums
		91.03	Activities for the preservation of historical places and buildings, cultural monuments
		91.04	Activities of botanical gardens, zoos and nature reserves
93			Activities in the Field of Sports, Recreation and Entertainment
	93.2		Leisure and entertainment activities
		93.21	Activities of recreation parks and theme parks
		93.29	Other recreational activities