

كرايستة عراق

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Executive Summary

Iraq's creative economy is widely consumed, narrowly understood, and taken for granted by Iraqis and people around the world. It adorns buildings and billboards, tells stories on televisions and cinemas, entices consumers on packaging, plays the soundtrack of lives, enchants tourists, enlivens pilgrims, and fills venues. Iraqi artisans are composing orchestral tours around the Middle East and Europe, designing national football jerseys, producing Netflix films watched globally, and sharing their rich culture with millions on Instagram, TikTok and YouTube. Iraqis are telling their own stories in their own voice, charting their own future and touching the hearts of the world.

Despite recent decades of instability and conflict, the descendants of ancient Mesopotamia's "cradle of civilisation", the Epic of Gilgamesh, the Code of Hammurabi and the Arabian Nights, are creating a cultural renaissance in the world today.

The creative economy in Iraq presents a very mixed picture: thriving in some areas such as its unique musical traditions, its 'Shaabi' poetry and its talented digital media community but under significant pressure

in others where gaps in skills, policy and commercial investment are holding back development. These sectors—screen, literature, music, theatre, heritage, visual art, handicraft and digital media—are recognised increasingly as critical components of any society. These sectors, vital to sustainable development and inclusive growth, together form "the missing pillar" of the UN Sustainable Development Goals (SDGs). The creative economy presents a unique opportunity for Iraqis to create jobs and diversify the economy, from energy dependency to knowledge-based, while providing the means to tell and see their own stories—a narrative that has been out of their hands for generations.

Moreover, after decades of conflict and instability, Iraq is transitioning from a period of humanitarian emergency to a new phase of: 'durable solutions'. This progress introduces a need by policymakers and international partners to develop insight, networks and programming models relevant to the needs of Iraqis. As the development field evolves from a 'means-based' to a 'values-based' model, Iraq's

creative economy can contribute to the development agenda in ways other sectors cannot.

However, the sector is new, undocumented, and lacking coordination and understanding. But its growing role—and the appreciation for it—has motivated policymakers and investors to understand it better. The Iraqi experience can offer valuable inspiration and good practice globally for other countries emerging from conflict who are embarking upon new creative economy journeys.

In this context, the British Council commissioned creative economy consultants, Nordicity, to map Iraq's creative economy, understand the sector's opportunities and challenges, and chart the areas needing support and investment.

The research involved one year of consultations with over 600 Iraqi creatives from more than ten cities, alongside a national survey of over 600 stakeholders and a literature review of over 40 sources. The full report was reduced from more than 400 pages of fieldwork reporting, nearly four weeks of ethnographic participatory action research, and over 70 survey questions—many of which were multiplied by dozens of cross-tabulations.

This is an abridged 30-page version of a wider 200-page research report, sharing the most salient findings of the research in a concise overview of the state of the creative economy. It provides a national baseline for Iraq's creative economy, including its make-up and stakeholders, opportunities and barriers, and strategic options for the future. These options are set out in section 6 of the report: Recommendations Towards a Strategy. This report is a starting point for informing policy and investment, one step of many interconnected initiatives by local, national and international support bodies to advance the long-term

development of Iraq's creative economy and realise some of its enormous potential.

Culture and development have an integral role in Iraq's social and economic prosperity that can cultivate inclusive growth, cultural relations and peacebuilding.



1. Iraq's Creative Economy

Iraq is home to one of the oldest civilisations on the planet. Having laid the foundation for heritage globally, it has influenced cultures from all corners of the world. Meanwhile, over the last half-century, Iraq has faced conflict, instability and disruption in its economy, society and culture. As Iraq transitions from humanitarian emergency where needs have focused on peacebuilding and human rights, today it is in a phase of redevelopment and building, focused on advancing cooperation, livelihoods, diversification from oil dependency strengthening community cohesion and managing pressures around climate change and demographics for its young and diverse population.

There is a unique role for culture in the next development phase of Iraq as it moves from humanitarian crisis to 'durable solutions' focused on cooperation, livelihoods, economic diversification, demographic changes and climate change. Across Iraq, and especially in cities most recently emerging from occupation by Daesh (ISIS), the cultural and creative industries have proven invaluable for the resilience of the people during conflict and the reclaiming of their cities and lives post-conflict.

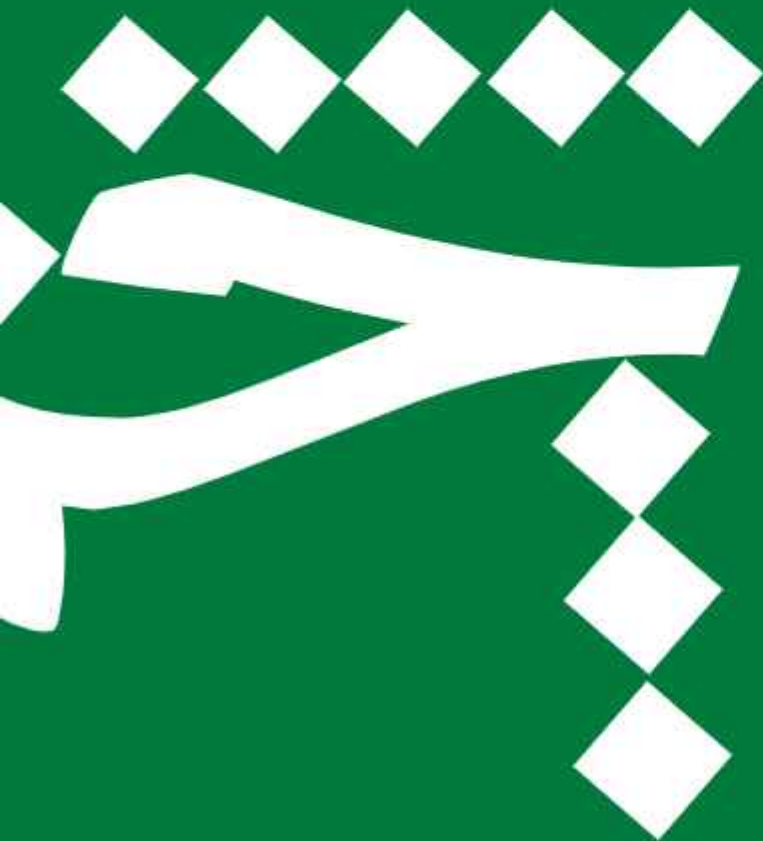
Cities such as Mosul, which were crippled under occupation by Daesh, have begun rebuilding, reclaiming and giving birth to a new future through culture—through establishing musical orchestras, rebuilding cultural venues, documenting stories through film and photography, developing experiences through mobile apps and video games, establishing centres of

research and innovation through the opening of creative hubs, and so much more.

The cultural and creative industries are major drivers of economies, generating \$2bn and 30m jobs globally. Anchored



in people-centred value, and building on cultural heritage and creativity, the creative economy can help achieve sustainable and inclusive development, build resilience in local economies, foster social cohesion and cultural diplomacy, and contribute to the 2030 Agenda and its Sustainable Development Goals (SDGs). In the face of Iraq's unparalleled cultural heritage and burgeoning contemporary creative sector, there is little understanding about Iraq's modern functioning creative economy. Knowledge for how to develop a creative economy is also lacking.



This project was funded by the British Council, focusing on supporting sustainable long-term outcomes and impacts on a policy level (with policy-level stakeholders in government and NGOs), with institutions such as higher education, museums, etc., and on a practitioner level with creative enterprises, creatives, artists and workers. It also aimed to support the community level. The research was led by creative economy consultants, Nordicity, and co-developed and delivered with Iraqi creative agency BeCorp.

The research aims to inform support for Iraqi creatives and the creative enterprises emerging in this field through the development of greater opportunities and reduced barriers in the creative economy. It also aims to support local and regional policy-level stakeholders, such as national, regional and local government by providing industry information to support evidence-based policies and decision-making.

As one of the oldest civilisations in the world, Iraq is also home to one of the longest standing creative economies on the globe. Iraq has one of the largest media sectors in the Middle East, and it has had a modernist pioneering role in the Arab region through much of the last century. Modern Iraq stands on the ancient lands of Mesopotamia, the fertile crescent between the Tigris and Euphrates Rivers. From 6,000 BC, Iraq gave rise to one of the world's first civilisations including the Babylonians, Assyrians, and Sumerians. It was here where farming, writing, organised religion, astrology, and chronometry were first developed. Through the seventh century, Iraq was at the centre of the Islamic Golden Age, where Baghdad became one of the largest and most important creative cities in the world for four centuries. Modern Iraq emerged in 1920 and became a republic in 1958. After four decades of conflict from 1980-2017, Iraq's creative economy is re-emerging with much dynamism and impact as the country enters a new phase of

development. One of Iraq's secret recipes is its diversity. It is home to many ethnic groups including Arabs (75%), Kurds, Assyrians, Turkmen, Persians and Yazidis among others (25%). And while most of the population is Muslim (65% Shia, 35% Sunni), there are significant communities of Christians, Yazidis, Mandeans and others—often working under the same creative economy umbrella. It is this diversity of peoples, cultures and ideas that makes Iraq's creative economy truly unique, and is the biggest source of its impact and potential.





2. Methodology

This research was co-developed with Iraqis and for Iraqis—applying a people-centred approach to participatory action research—with the ethos of helping Iraqis tell their own stories and shape their own narrative. The commitment of co-development and engaging stakeholders at each step of the research process was a foundational principle throughout the project. A team of Iraqi creatives from the creative agency BeCorp co-designed and co-facilitated the research with the Nordicity research team alongside British Council. In this sense, the study was conducted by Iraqis for Iraqis. The consultations also applied a 'snowball' approach to identifying and engaging with ever more stakeholders; it leveraged networks, social media, informal groups and word of mouth to expand its reach and engagement.

Key Research Methods

Consultations with over 600 stakeholders: conducted face to face and nationwide with over 600 stakeholders from across Iraq's creative economy in Arabic, Kurdish (Sorani and Kurmanji) and English. Ethnographic research was undertaken in the places people worked, captured in observation notes, with video and photo documentation of the process.

Survey of over 600 stakeholders: national survey generating over 600 responses from across Iraq's creative economy in Arabic, Kurdish (Sorani and Kurmanji) and English, to over 70 questions, each of which could be analysed in multiple ways through cross-tabulations.

Literature review of over 40 sources: conducted throughout the research providing a foundation to the

project, informed the research design and align to build upon a growing body of work.

The research aimed to map and profile the state of Iraq's creative economy for the first time. The study was conducted in the context of many initiatives across Iraq's cultural and creative industries by government and partner agencies, and other creative economy projects and research initiatives.

The study used descriptive research informed by quantitative and qualitative data. Data was collected largely through primary sources: individual and group consultations, ethnographic and observational research, surveys and case studies—and supplemented by secondary sources and literature review. Adopting sustainable development principles to stakeholder engagement, an inclusive and people-centred scope was applied to the stakeholder engagement: it aimed to engage any individual, group or organisation that could be impacted by the creative economy. In other words, it sought and welcomed anyone with an interest in the outcome of this research.

The research engaged with a diverse and inclusive cross-section of Iraqi society, seeking representation across gender, location, ethnicity, religion, language, ability, age, marriage and parental status, and class or socioeconomic background.

To be as accessible as possible, transportation and accommodation were provided to stakeholders from all corners of the country for face-to-face consultations.

A multilingual team conducted the survey and consultations in Arabic, Kurdish (Sorani and Kurmanji) and English.

Each consultation was tailored according to sector, constituent, locale and interests. Consultations were conducted both face to face and online. These included group and individual consultations as well as spoken and written consultations. Face-to-face consultations were delivered as a roadshow across the country over two weeks in December 2021 and two weeks in March 2022. Meetings were held in morning, day and night, in different venues and environments, and in both semi-formal and informal settings.

Consultations provided mutual benefit for both the consultees and the researchers. The participants gained capacity building, knowledge transfer and networking through workshops, roundtables, seminars, conferences and performances. Participants were also invited to bring their creative works, instruments, stories and performances to the consultations for showing, telling and performing among the group. Groups ranged from five to sixty-five people from diverse backgrounds, locations, cultures, language groups and sectors. Some consultations were

conducted in groups of one language, while other groups mixed participants and were conducted in two, three and sometimes four languages at once. Similarly, some workshops were grouped by sector, location and roles, while others mixed different industries, locations, age and seniority.

Careful attention to delivering participatory action research was essential in the approach, and without direction from Iraqis, this project would not have been possible.



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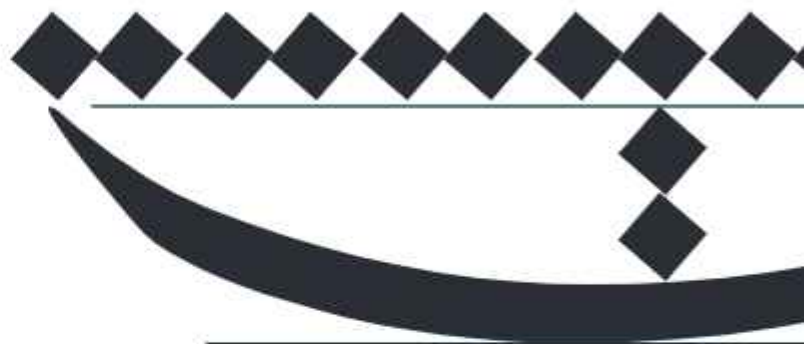
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3. Creative Cities at a Glance

Iraq's cities are flourishing with culture and creativity. It is in these cities where most of Iraq's creative economy activity takes place. The following table provides an overview of the research findings organised by major Iraqi cities of cultural interest. Each city has been reviewed according to its key background and context, strengths, needs, celebrations, and movers and shakers.



	Baghdad (8.1 m)	Mosul (1.7 m)	Erbil (1.6 m)
Background and Context	Baghdad is at the centre of Iraq's creative economy and is a major influence on creative cities across the country. It serves as the capital for most creative industries, predominantly the screen, literature, music, visual art and handcraft sectors, and home to many larger companies, multinationals and institutions, industry associations, syndicates, government. It was founded in 762 AD by Caliph Al-Mansur to serve as the capital of the Abbasid Caliphate.	Mosul is a major cultural centre for Iraq and the region, now rebuilding since its liberation in 2017. Today, it is undergoing a renaissance in culture and creativity. Built by Assyrians around 850 BC, Mosul became one of the most important cultural cities in the region for millennia.	Erbil is a national centre for culture and heritage, and a focal point for the international community. It has a thriving visual art, photography, music, documentary, handcraft and cultural heritage sector with some of the most advanced skills and infrastructure in the region. It is amongst the world's most ancient cities, dating back to 2300 BC.

**Basra**

(1.4 m)

Basra has a burgeoning creative sector celebrated for its literature, digital media and design sectors, a booming social media scene, and a centre of 'shaabi' popular folk culture, music, poetry and visual art. After two decades of conflict, Basra is rebounding with a cultural renaissance. It was founded at the beginning of the Islamic era, becoming a creative city on the Gulf, Tigris and Euphrates Rivers

Sulaymaniyah

(878k)

Sulaymaniyah is a thriving modern and outward-looking creative city. It is a leading national centre for advertising and digital media with reach across the country, and an emerging social enterprise and tech startup scene. Modern Sulaymaniyah was founded in 1784, became capital of Baban under the Ottoman Empire, and today is a cultural capital of Kurdistan.

Karbala

(690 k)

Karbala is a global religious capital of culture welcoming millions of Shia Muslims from all over the world on pilgrimage and religious tourism, and renowned for its built environment, local markets and handicrafts. It began as a tomb and shrine to Husayn Ibn Ali, grandson of the prophet Muhammad, killed during the Battle of Karbala.

Duhok

(400k)

Duhok is a diverse and multicultural creative city, today and in ancient times, with strong design, photography and visual art, music and cultural heritage sectors. It dates to the Stone Age, and like many cities, Dohuk came under the dominion of numerous empires throughout the centuries. In recent years, Duhok hosts over 300,000 refugees, mostly Yazidi and Christian.

	Baghdad (8.1 m)	Mosul (1.7 m)	Erbil (1.6 m)
Strenghts	<p>Centre of Iraq's creative economy</p> <p>Member of UNESCO Creative Cities Network (City of Literature)</p> <p>2013 Arab Capital of Culture</p> <p>Home to major policy-level and decision-maker stakeholders and investors</p> <p>Centre of cultural festivals and events</p> <p>Facilitator of knowledge exchange with other creative cities</p> <p>Home to public support bodies like the Baghdad Film Fund</p>	<p>Important regional music city, strengths in photography and photojournalism, historical centre of creative tourism and a founding city of Iraqi theatre and cinema</p> <p>Centre of major restoration efforts to revive the creative economy</p> <p>Home to major festivals and initiatives Monodrama, Street Festival and UNESCO "Revive the Spirit of Mosul" 2018</p> <p>Home to UNESCO and UAE reconstruction of Al-Hadba minaret, Al-Saa'a Church and Al-Tahera Church 2022</p>	<p>Centre of Iraqi Kurdish creative economy and international Kurdish cultural capital</p> <p>Supportive government and policymakers</p> <p>Centre of tourism and was 2014 Arab Tourism Capital</p> <p>Centre for international development sector</p> <p>Erbil Citadel UNESCO World Heritage Site restoration collaboration with UNESCO and Kurdistan Regional Government</p>
Priorities	<p>Provide training and funding for capacity building</p> <p>Promote cultural exchange and collaboration between cities</p> <p>Allocate funding for infrastructure upgrades</p> <p>Provide support across the country through a hub-and-spoke model</p>	<p>Use culture in the reconstruction effort to rebuild cultural fabric, communities and infrastructure</p> <p>Reinstate the funding stopped during instability, conflict and corruption</p>	<p>Use culture to address the indirect economic and social strains of conflict</p> <p>Leverage international development partners and tourism sector to expand international reach</p>

Basra (1.4 m)	Sulaymaniya (878 k)	Karbala (690k)	Duhok (400 k)
<p>Important cultural hub with strengths in advertising, marketing, poetry, literature and calligraphy</p> <p>Traditional city with heritage of religious values and conservation</p> <p>Social landscape enriched with heritage, traditional, tribal and social influence</p> <p>Home to EU UNESCO rebuild and celebration of Old City of Basra</p>	<p>Major centre for domestic tourism, media, marketing and advertising, and prominence of national media agencies centre.</p> <p>Home to Sulaymaniyah Museum, Iraq's second largest museum</p> <p>Cultural capital of Kurdistan with national and international acclaim and reach.</p>	<p>Holy city for Shia Muslims (resting place of Husayn), with pilgrimages and annual processions for religious and cultural tourism</p> <p>Strong tradition of religious design and handicrafts</p> <p>Street markets operate as cultural hubs</p>	<p>Strong connection with cultural heritage and a regional hub of diverse peoples</p> <p>Centre for visual arts, music, and festivals, urban planning and design</p> <p>Home to Duhok International Film Festival</p> <p>History celebrating diversity as a major strength</p> <p>Strong collaboration between tourism and creative sectors</p> <p>Supportive government and policymakers</p>
<p>Direct public and private investment and support to Basra, and operate as regional hub across the south</p> <p>Connect and catalyse coordination and collaboration across Iraq and internationally</p> <p>Reinstate support and funding to infrastructure and activities that were impacted through conflict</p>	<p>supports on a city and regional level</p> <p>Support funding and investment, limited access to technology for creatives, traditional cultural attitudes</p> <p>Leverage the city's strength in advertising and design</p>	<p>Develop local cultural policies and supports on a city and regional level.</p> <p>Leverage the traditional and religious arts sectors and tourism industry.</p>	<p>Use culture to address the indirect economic and social strains of conflict, engage with refugees and displaced people</p> <p>Provide funding and investment to extend Duhok's role as a creative hub and provide support across the region</p> <p>Leverage the strengths in skills, cultural heritage, tourism and diversity</p>

	Baghdad (8.1 m)	Mosul (1.7 m)	Erbil (1.6 m)
Festivals & Cultural Events	<p>The Baghdad International Fair</p> <p>Baghdad International Book Fair</p> <p>International Film Festival (BIFF)</p> <p>Poetry festivals like Al-Jawahiri Festival</p> <p>Al Wasiti-Fine Arts Festival</p> <p>Baghdad University International Film & TV Festival</p> <p>International Festival of Flowers in Baghdad</p> <p>Babylon International Festival</p>	<p>Spirit of Mosul</p> <p>Mosul Traditional Music Festival</p> <p>Monodrama Festival</p> <p>Street Festival</p> <p>Mosul's Peace Festival</p>	<p>Freedom and Newroz Festival</p> <p>Erbil International Film Festival</p> <p>Global Migration Film Festival</p> <p>Erbil Reading Festival</p> <p>Erbil International Food Festival</p>
Assets and Influencers	<ul style="list-style-type: none"> - National Theatre - The Music and Ballet School of Baghdad - Institute of Fine Arts Baghdad - Iraqi National Symphony Orchestra - Iraq Museum - Baghdadi Museum - Natural History Museum - Baghdad Classical Youth Ensemble - Peace Orchestra of Iraqi Oud - Beit Tarkib - The Station 	<p>Al Rabiya Theatre</p> <p>Mosul Museum</p> <p>Faculty of Fine Arts, University of Mosul</p> <p>Baytuna Foundation for Culture & Arts</p> <p>Beit Al-Maqam Al-Iraqi</p> <p>Reviving the Spirit of Mosul</p> <p>Wattar Orchestra</p> <p>Mosul Folk Orchestra</p>	<p>Citadel of Erbil</p> <p>Kurdish Textile Museum</p> <p>Erbil Civilization Museum</p> <p>Mudhafaria Minaret</p> <p>Five One Labs</p> <p>Framing Photojournalism School</p> <p>S v Gallery</p> <p>Erbil Fine Arts College</p> <p>Prosperity Catalyst Institute</p>

Basra (1.4 m)	Sulaymaniyah (878 k)	Karbala (690 k)	Duhok (400 k)
Freedom and Newroz Festival Erbil International Film Festival Global Migration Film Festival Erbil Reading Festival Erbil International Food Festival	Slemani International Film Festival Space21 Sound Art Festival Galawej Festival Women's Festival of Crafts Winter Festival	Arbaeen (or Ziara) annual holy festival Tarateel Sajjadiya Festival World Music Day (F te de la Musique)	Arbaeen (or Ziara) annual holy festival Tarateel Sajjadiya Festival World Music Day (F te de la Musique) Duhok International Film Festival. Akitu Festival of Assyrian culture Duhok Folklore Festival Duhok Cultural Festival
Basra Museum College of Fine Arts at Basra University Basra Society for Heritage, Culture and Arts Fine Arts Association of Basra Al Mada Foundation Dar Shahriar Publishing House	Sulaymaniyah Museum The Factory Five One Labs Institute of Fine Arts in Sulaymaniyah College of Fine Arts (University of Sulaymaniyah) University of Sulaimani American University of Iraq Sulaimani Kurdish Cultural Institute	Museum of Imam Hussein Holy Shrine Karbala University Karbala Satellite Channel Group Ahlulbayt Youth Group for Art	Duhok Directorate of Culture University of Duhok Fine Art Institute Duhok Art Gallery Walking Arts

4. Creative Sectors

The research reveals that there are also general patterns to be found in the creative sectors across the country. This section is assesses the state of the creative sectors within Iraq's creative economy. The key challenges facing each sector and the strengths to build upon in addressing them are summarised in the table below. Details of these findings are available in the full research report and appendices.



		Screen	Writing & Literature	Music	Theatre & Performing Art
Finance	Challenges	Lack of domestic financing, investment and financial support for film production and companies.	High cost of doing business and lack of publisher financing for new and underrepresented writing, business development, production, localisation and translation to foreign languages.	Lack of investment in live music venues, recorded music production, distribution, licensing and marketing, and creative R&D.	General lack of funding and investment.
	Strengths	Resourceful industry, experience in raising financing from private and international sources, established collectives and coproductions.	Investment and financial support from academia, government and major private organisations.	Largely self-financed sector drawing on friends, family and associates.	Support with education sector, self-funding, philanthropy and volunteerism.



Cultural Heritage

Lack of funding to preserve, protect and create value from the vast volume of cultural heritage.

Major investment and attention from local and global public, development and academic partners.

Visual Art

Lack of investment in creative and talent development, courses and art schools, undervaluing of Iraqi art, and limited sources of funding for development.

Increased self-funding, philanthropic financing, and corporate sponsorship in galleries, exhibition and market development.

Handicrafts

High cost of doing business, including materials, shipping and warehousing and a lack of investment in R&D, production, commercialisation, sales and distribution.

Entrepreneurial sector with potential for scalability, economies of scale and established business models.

Advertising & Digital Media

Lack of investment in human resources, R&D, production and business investment-readiness.

Entrepreneurial sector motivated to become investor-ready, scale operations and develop return on investment.

		Screen	Writing & Literature	Music	Theatre & Performing Art
Skills	Challenges	Shortage of high-skilled above-the-line and below-the-line roles intensified by lack of professional film school and professional training.	Shortage of skills and training opportunities in writing, business, sales, design and marketing.	Shortage of creative, technical and music theory skills, training, music schools and practical experience opportunities in music creation, live performance, recording and professional development.	Shortage of technical skills and training opportunities in scriptwriting, directing, producing and general theatre-making, lack of mentors and practical learning opportunities outside of formal education.
	Strengths	Agile, entrepreneurial, and motivated talent pool building on self-taught creatives and strengths.	Legacy of longstanding industry leaders alongside new and emerging players, dynamic workforce and strong connections to academia.	Dynamic, diverse and unique musical styles, methods and techniques in both traditional and popular genres.	Strong links with education sector, self- and peer-learning, on the job training, and a DIY spirit.

Cultural Heritage	Visual Art	Handicrafts	Advertising & Digital Media
<p>Shortage of technical, creative and business skills in cultural heritage including heritage preservation, presentation, interpretation and tourism, sales and marketing, and governance.</p>	<p>Shortage of skills and practical learning opportunities in visual art techniques through art schools and courses, lack of entrepreneurial skills, traditional training and a gap in new art techniques, methods, trends and influences.</p>	<p>Shortage of sales, marketing, commercialisation and industrial design skills, lack of skilled production workers, and digital skills, and high worker turnover.</p>	<p>Shortage of creative, technical and business skills, lack of industry-standard training, high turnover and cost of labour, and high level of informal training and on-the-job learning.</p>
<p>World-class workforce, global expertise and best practice skills in archaeology and anthropology, and strong connections with exemplary global academia.</p>	<p>Global leading schools of calligraphy, master teachers and established visual art programmes.</p>	<p>Experienced industry leaders, motivation to train, upskill and develop the workforce and industry succession planning.</p>	<p>Low barrier to entry, informal and accessible, diverse and dynamic workforce, attuned to global trends and competitive approaches.</p>

		Screen	Writing & Literature	Music	Theatre & Performing Art
Market & Sales	Challenges	Limited audience, market size and demand for Iraqi films, and lack of opportunities to show Iraqi films, public misunderstandings of Iraqi content and small domestic audiences, few cinemas showing Iraqi movies, and lack of access to film festivals, markets, and distribution.	A disaggregated market operating in multiple languages, cultures and regions, emigration, brain drain, cost of translation, lack of reader development and digital sales.	Limited market size, shortage of live and recorded music, lack of music distribution, sync licensing and publishing, and limited live music performance opportunities, venues and audience development.	Limited market size, audience demand, commercialisation and digital adoption.
	Strengths	Growing demand for Iraqi content, increased attention globally, strong linkages to advertising and digital media sectors, and network of cinemas across the country that can become film sector hubs.	Literature and poetry permeate across Iraqi society, Iraq is known as a country of writers, tradition of successful literary publishers, writers, booksellers and festivals, and an expansion into new forms of writing using different platforms and new mediums.	Thriving live music sector strong in traditional, classical and popular music subsectors; highly localised with distinct qualities.	Tradition of theatre and dance cross-pollinating with cultural heritage, tourism, literature, music and screen, addressing issues of social importance, unique venues from both contemporary and ancient times, and ambitions for digital opportunities.

Cultural Heritage	Visual Art	Handicrafts	Advertising & Digital Media
Limited market awareness and audience development, nascent tourism sector, shortage of visitor infrastructure, lack of media coverage and limited collaboration with wider creative economy.	Lack of domestic demand, discoverability, marketing and commercialization, and limited sales platforms and distribution channels.	Limited domestic market size and international market reach, international competition, branding and quality assurance.	Limited domestic demand, value perception and underappreciation, low client spend threshold, international competition, lack of quality assurance and mutually harmful internal market competition.
Growing local and global demand, emerging tourism sector, and government and international support.	Growing demand for traditional and modern artforms, thriving classical and popular calligraphy scene, increased reach through social media, and ongoing demand from art collectors buying from outside the country.	High demand for Iraqi-designed furniture, established retail sales in showrooms, hotels, embassies and airports, thriving 'street markets' (souqs), emerging tourism market, and growing links with international development sector.	Emerging sector with untapped domestic growth potential, national and international reach across regional Kurdish and Arab markets, low cost of business and access to global trends.

		Screen	Writing & Literature	Music	Theatre & Performing Art
Policy	Challenges	Lack of public film agency, policy support, regulatory guidance, classification system and archive, intensified by a general undervaluing of the sector.	Lack of literature policy support, disaggregated industry representation across multiple associations and syndicates.	Lack of policy-level support, public undervaluing, social and family barriers, and health and safety, particularly for women and underrepresented groups.	Lack of industry coordination, advocacy and policy-level engagement.
	Challenges	Growing engagement with policymakers, increased government support and recognition.	Value of literature is widely celebrated, industry leaders motivated to support and represent the sector, and desire to advocate, cooperate and 'speak' in a collective voice.	Strong links with tourism, hospitality and international development sectors, and links with traditional and religious cultural tourism, singing, Qur'an reading, events and celebrations.	Strong community and cultural focus and ambition to support policy priorities and social impact.

Cultural Heritage	Visual Art	Handicrafts	Advertising & Digital Media
Complex governance structure, policy landscape and regulatory environment, lack of public awareness, support and industry coordination, conflict and security threats to sites (theft, destruction, depreciation), and access to and ownership of sites and artefacts.	Lack of policy-level support, public undervaluing, intergenerational gap and disconnect between classical and modern arts.	Supply chain barriers, lack of materials and equipment, import administration, tariffs, shipping, warehousing and online sales and digital banking regulation.	Lack of industry coordination, collaboration, representation and advocacy.
Supportive government, major international investment, foreign aid and attention, global leadership and expertise, supporting wider policy priorities and uniquely engaging with refugees and displaced peoples.	Established industry associations and syndicates, representation across traditional and modern artforms.	Collaborative and coordinated leadership, motivation to formalise industry representation and establish associations, and focus on addressing policy priorities, sustainable development and supporting local and international development partners.	Strong desire to coordinate and develop industry associations, sector development, capacity building, representation and advocacy.

		Screen	Writing & Literature	Music	Theatre & Performing Art
Infrastructure	Challenges	Lack of production companies, studios and sound stages, locations support, equipment, and distribution channels.	High cost and need to import printing, shipping and tariffs, underserved libraries, and digital infrastructure.	Lack of dedicated music infrastructure, limited recorded music supply chains, studio, publishing, sync licensing and distribution; lack of music sector hubs, live performance and rehearsal venues, challenge accessing musical instruments, equipment and books, and lack of domestic and internationally connected supply chains.	Lack of dedicated theatre industry infrastructure like venues, rehearsal spaces, commercial producers, touring productions, theatre festivals and industry associations.
	Strengths	DIY approach, informal industry coordination and sharing of resources.	Established domestic and international supply chains, and coordinated links between publishers, writers, booksellers and literary events.	Restaurants, cafes, hotels and festivals are the main de facto live music venues; professional and home recording studios in the major cities, links with Arab and Kurdish recorded music industry (mainly Saudi Arabia and Turkey), and established network of music industry representative syndicates.	Unique venues from ancient and contemporary times, cultural heritage sites, restaurants and cafes, hotels and universities around the country, re-emergence of theatre festivals and growing interest in digital infrastructure.

Cultural Heritage	Visual Art	Handicrafts	Advertising & Digital Media
Lack of infrastructure in general, facilities and equipment to document, archive, preserve, restore, display and exploit artefacts and sites.	Shortage of galleries, spaces and opportunities to create, show and sell, digital infrastructure for online sales and distribution, creative hubs, and access to affordable material, equipment, tools and workspace.	Lack of access to materials, tools, equipment and production facilities, reliance on imports, high cost of moving goods, and lack of digital and online sales infrastructure.	Lack of affordable workspace, tools and equipment for audiovisual production, nascent industry with many new companies and lack of global flagship companies.
Global leader in the volume and quality of cultural heritage sites and artefacts, emerging leader in archaeology and anthropology, and rebounding museums sector.	Leading schools of art and calligraphy, growing contemporary art scene, establishment of galleries and increased showcasing opportunities in major cities.	Highly coordinated and collaborative sector, ability to share resources and achieve economies of scale.	Fast and organically grown sector over the last 15 years, with local and international experience, clustered in the major cities of Baghdad, Erbil, Sulaymaniyah and Basra.

4.1 Screen

The Iraqi screen sector is flourishing. It has undergone a renaissance over the last decade. In recent years, a new wave of Iraqi cinema has emerged at home and abroad. Its success is correlated with advertising, digital and social media and storytelling.

Storytelling through screen has driven this sector's growth, as there is a desire among industry members to support the nation's redevelopment, healing and positive social change. The sector is motivated by creating a more inclusive, prosperous and happy society. In the lifetime of most Iraqis, film and TV has mainly come from abroad, even the stories about Iraq. But Iraqis want to tell and hear their own stories. And the stories they have been telling through film address themes of conflict, resilience and rebuilding, while the artform moves toward more edgy, provocative and pioneering storytelling.

The sector's origins date back to the 1920s when audiences filled some of the country's first cinemas, like Baghdad's celebrated Al-Zawra on Al-Rasheed Street. Through the 1940s-50s, Iraqi-made films flourished with the establishment of domestic studios. Activity slowed from the 1960s-80s and was crippled through the 1990s under UN sanctions, coming to a halt through years of conflict from 2003 to 2017.

Today, the sector is building an ecosystem that is supportive of viable and successful careers and businesses in screen. The Iraq-Palestine-UK

co-production "Hanging Gardens", for example, played at the Venice and Red Sea international film festivals (2022), while "Haifa Street" gained acclaim at Tribeca, Busan and Jerusalem, and got Netflix distribution (2019). The Iraqi International Film Festival was established in 2018; its grassroots founders also developed the Habibi Collective for women of the Southwest Asian and North African (SWANA) diaspora, as well as "Shasha Movies", the first independent streaming service for SWANA cinema.

Key challenges and recommendations are presented below while a wider assessment is available in the full research report.



Mini Case: Mohaned Al-Kateb



Mohaned is an Iraqi animation artist who captured the conflict in Mosul from the Iraqi Civil War and liberation from ISIS. He worked with the security forces' terror combat group to make the production as real as possible – like recording sounds of live gunfire. There were severe sector supply chain shortages in Iraq, so he collaborated with Lebanese partners. His animation won 3rd place in an Australian animation award.

Image: Mohaned Al-Kateb, Mohaned Studio. Source: Stephen Hignell

Key Challenges	Recommendation
Lack of finance, including public funding and private investment	Invest in film production funding. Raise awareness, advocacy, value and understanding of the sector. Develop business skills and investor readiness of production companies.
Lack of film sector- specific skills	Support film-specific training for technical, creative and business skills, including both above-the-line and below-the-line roles.
Lack of market development and sales	Harness the cinemas across Iraq as regional hubs to connect the film industry and show Iraqi films. Promote and market the Iraqi screen sector at film festivals and markets internationally.
Lack of access to film locations and production support	Establish a film office or its key elements, such as film permitting and a locations office.



4.2 Writing and Literature

Literature is a pervasive cultural form, impacting the lives of every Iraqi. It shapes thoughts and ideas in all sections of society, expresses thoughts and feelings for the reader and writer alike, while preserving culture and fostering cross-cultural understanding. Literature is a key driver in many creative sectors, including film and TV, theatre, music, digital media and advertising.

Iraq's literary heritage is unparalleled, dating back four thousand years to the Epic of Gilgamesh, and has been a major influence on the written word since. Literature in Iraq today is popular for both its poetry and prose, and writers from both genres are often household names. One of the fathers of Iraqi literature, Al-Mutanabbi, ushered in the Islamic Golden Age across the Arab world with poems from the 10th century.

Literature remains central to Iraqi society. Today, contemporary Iraqi poets such as Mohammed Al-Jawahari, Badar Shaqr Alsaib and Lamiya Abbas Imara carry on the ancient tradition in dynamic modern ways. One prominent form is "Shaabi" poetry, a folk poetry with a musical form using the voice of the street. Celebrated Iraqi poets such as Arian Alsaied Khalaf, Mudafar Al-Nawab and Kadim Ishmael Gada influenced and developed its form.

Many recognisable Iraqi writers have moved abroad, like Ahmed Al-Sadawi (International Prize for Arab Fiction winner for *Frankenstein in Baghdad*), Enaam Kechechi, Mohasin Al-Ramlji, Sinan Antouan and Ali Bader, while some remain, such as Abdul Khaliq Al Rikabi (*Seventh Day of Creation*).

Baghdad is known across the Arab world for its exemplary

poets, Qur'an readers and calligraphers. Indeed, for any wedding, funeral or celebration, a poet or Qur'an reader is customarily hired. It is against this background that the Arabic expression "Egypt writes, Lebanon publishes & Iraq reads" underestimates the breadth of Iraq's literary sector. And so, another famous Arabic expression, this time unfair to its neighbours, "Poetry was born in Iraq, lived in Syria and died in Egypt", might resonate more loudly with Iraq's literature sector.

Key challenges and recommendations are presented below while a wider assessment is available in the full research report.



Key Challenge	Recommendation
Lack of market development and sales for Iraqi publishing	<p>Provide training for publishing sales and marketing.</p> <p>Promote Iraqi publishing at book fairs, markets and conferences around the world. Iraq has an opportunity to host a major market.</p> <p>Support more inbound and outbound translation and publishing with global markets.</p> <p>Position Iraq as a global hub for Kurdish publishing.</p> <p>Support schools and libraries to collaborate with publishers (and writers) on curriculums, guest speakers, skills development and sector awareness.</p> <p>Coordinate literature sector with other related sectors for cross-pollination.</p> <p>Invest in digital sales market.</p> <p>Improve regulatory environment to make sales, digital electronic payments and e-banking more accessible.</p>
Lack of publishing opportunities for writers (especially for innovative and underrepresented writing)	<p>Provide financial and technical support for Iraqi publisher projects and operations.</p> <p>Support capacity building for publishing companies.</p> <p>Invest in writer development through courses and workshops.</p> <p>Support publishing projects by funding more diverse and innovative content and from writers from underrepresented groups.</p>
High cost of printing and shipping	<p>Develop shared services for sourcing printing, equipment, tools, materials and shipping to achieve economies of scale.</p> <p>Explore onshoring of printing in Iraq.</p>



الشعر ولد في العراق وعاش في سوريا ومات في مصر

تعبير عربي

4.3 Music

Music is one of the largest and most widespread artforms in Iraq's creative economy; music is highly localised from region to region. It connects traditional and contemporary culture and builds bridges across languages, cultures, geographies and generations. An integral contributor to other creative sectors (film, theatre, advertising and digital media), music is also one of the least developed of Iraq's key creative sectors. With carefully designed support, it can grow to achieve its true potential.

Iraq is a highly musical country. It gave birth to some of the earliest musical instruments, including the oud (an ancestor of the guitar) and the Bull Headed Lyre of Ur, the oldest stringed instrument ever discovered, over 4,500 years ago. The Iraqi method of oud playing has

influenced music in the Arab world for centuries to this day; the distinctly Iraqi eastern semi-tone, known as maqam, has influenced generations of musicians around the world and is now enshrined as a UNESCO Intangible Cultural Heritage.

Music connects Iraqis to their past, present and future. Current trends see blending of Iraqi traditions with cultures from around the world, creating new sounds and stories.

Key challenges and recommendations are presented below while a wider assessment is available in the full research report.





Key Challenges	Recommendations
Lack of spaces to rehearse, perform, create and record music	<p>Support venues to diversify and commercialise operations.</p> <p>Provide financial and technical support for venues, sound, lighting, stages, artist rooms and backstage.</p> <p>Facilitate knowledge transfer and exchange with international venue and festival experts.</p> <p>Support venues to become creative hubs.</p>
Lack of industry standards for the sector to operate with stability and consistency and safety	<p>Develop live music industry guidance and terms of reference for artists and businesses.</p> <p>Create safe spaces for women and people from underrepresented groups to perform and consume live music.</p>
Limited recorded music sector	<p>Develop skills and capacity in recorded music. Provide industry-specific training for recording, publishing, copyright, licensing and distribution.</p> <p>Develop a marketing and promotion campaign for Iraqi music publishing and synch licensing for film and screen.</p> <p>Develop signposting and connections with studios, labels, publishers and distributors internationally.</p>
Disaggregated and siloed music industry	<p>Build capacity in industry self-organisation and representation through associations and syndicates.</p> <p>Develop a nationwide performance and touring circuit or syndicate of artists, promoters and venues.</p> <p>Foster regional collaboration, knowledge transfer and exchange among creatives.</p>

Iraqi Musical Heritage

Arabic music developed in Iraq in the eighth century AD, when Baghdad was the capital of the Abbasid Caliphate and the whole Islamic world. During the Abbasid period, Arabic music developed in Baghdad, Kufa, Basra and Mosul. Among the most famous musicians of the time were Ibrahim Al-Mosuli, Ishaq Al-Mosuli, Ibrahim Bin Al-Mahdi, Ibn Jami', Zeryab, Ibn Mehrez, Zureiq and Yehya Al-Mekki among others.

Singing during this period developed with the flourishing of poetry in Iraq at the time. The musician Ibrahim Al-Mosuli, for example, was granted exclusive rights to creating the music for the poems of Thil-Rimma by Caliph Harun Al-Rashid. Al-Mosuli trained female singers in perhaps the first organised female musical school in Arab history. Many books were written in this period on the rules of Arabic music and singing by Al-Khalil Bin Ahmed, Ishaq Bin Ya'qub Al-Kindi and Abi Faraj Al-Asbahani.

Traditional Iraqi music and singing were revived in the early modern times and named "Al-Maqam Al-Iraqi". Among the famous musicians and singers of this genre are Nazim Al-Ghazali and Muhammad Al-Qabanji.

For some creatives, traditional and religious music can be seen as the biggest unique advantage for Iraq's creative economy, with a potential to become normalised across cultural occasions in a similar way that Qur'an reading has.

The distinctly Iraqi eastern semi-tone, known as maqam (literally "rank") means "place" in Arabic, and is a distinctly Iraqi melody type of technique of improvisation

technique that defines pitches, patterns and development. Originating during the Islamic Golden Age in Iraq, maqam has influenced music and culture across the Iberian Peninsula, within Sephardic Jewish liturgy and weekly Torah reading (the Jewish and Israeli religious music called the Weekly Maqam), and traditional and religious music of the Italian isle of Sicily. The tone can be characterised in Arabic music where there are many multiple scales with each branched out (e.g., joyful scale), distinct from Western music which works in a minor and major scale.

The Iraqi school of oud was prominent and famous throughout the Arab world for many centuries. In 1998, the famous Iraqi oud player and master Naseer Shammah was given Egyptian nationality and established Beit Al-Oud Al-Arabi (The House of Arab Oud) in Cairo, with other branches established in Alexandria, UAE and Algeria.

4.4 Theatre and Performing Arts

Theatre and performing arts are a highly active sector in Iraq. The education system plays a key role in theatre making, linking schools, teachers and students to the artform.

Iraq's theatre sector experienced a boom in the 1970s and 1980s until sanctions were imposed in the 1990s and conflict through the millennium brought activity to a halt. Decades ago, companies frequently toured the country, cities established new venues, and investments in facilities supported the sector's wider cultural infrastructure. A small number of state-

run and education-linked productions emerged out of this period of instability from a modest but dedicated grassroots theatre community, providing a foundation for the sector today.

In recent years, initiatives of schools, universities, and local communities have spurred the return of students and experienced professionals to the sector.





Key Challenge	Recommendation
Lack of audience and market development	<p>Support marketing and promotion of sector activities.</p> <p>Support venues to improve physical infrastructure and programming.</p> <p>Convene and collaborate with other sectors such as tourism, festivals and events, digital media, screen and music.</p> <p>Support theatres to become creative hubs.</p> <p>Expand connections with education and theatre in schools.</p>
Small and limited professional theatre industry	<p>Support amateur theatre to develop a robust grassroots sector ecosystem. Embrace fringe and independent theatre as a strength.</p> <p>Provide financial and technical support for theatre industry training, workshops and courses.</p> <p>Provide industry leadership capacity building.</p> <p>Facilitate international theatre training, exchange and knowledge transfer.</p>

4.5 Cultural Heritage

Iraq is a global exemplar in cultural heritage. It is rich in archaeological sites and expertise, and as the cradle of civilization, its global potential to lead is enormous. The sector is strongly linked to the international community, academia, government and education in Iraq. It is also deeply influential in the country's tourism sector, drawing more policy attention and international interest than any other creative sector. This includes UK support through the Cultural Protection Fund, a partnership between the British Council and the UK's Department for Culture, Media and Sport (DCMS). Iraqi people themselves are engaging increasingly with the nation's cultural heritage. This momentum positions the sector well for contributing to sustainable development and inclusive growth.

Ancient sites are highly significant and extremely fragile. Most ancient Iraqi archaeological sites, unlike those of Greek, Roman, Egyptian or Indian heritage, were built with mud or fired bricks, which makes them highly vulnerable to weathering and vandalism. Despite their historic and scientific values, they are not easily understood by the typical person. The Ziggurats of Bursippa and Kish, for example, are not immediately recognisable as heritage sites to the average visitor – they are sometimes even mistaken for a "heap of mud". Meanwhile, most medieval and more recent historic buildings are in a poor state of conservation due to neglect, weathering or destruction by war and vandalism.

Work is needed to establish a cultural tourism industry. The lack of tourism infrastructure is an obstacle. But more importantly, the state of conservation, presentation and interpretation of heritage sites and buildings requires a lot of attention.

Key challenges and recommendations are presented below while a wider assessment is available in the full research report.



Key Challenges	Recommendation
More heritage sites than the sector can handle	Convene the sector through a forum or network to enhance coordination and allocation of resources. Maximise international collaborative missions, training and research. Support R&D in infrastructure, tools, methods and techniques.
Shortage of preservation and presentation skills development opportunities	Support international exchange, knowledge transfer and learning through mentorships, work placements, internships and developing communities of practice.
Lack of facilities, equipment and technical capacity	Invest in physical spaces for preserving and presenting cultural heritage. Invest in equipment, tools and technology, and the necessary skills to operate. Support industry coordination and shared services.
Lack of domestic and international awareness of the sector, including untapped tourism potential	Engage with other creative industries to amplify the reach, voice and creativity of the sector locally, nationally and internationally.



4.6 Visual Arts

Visual art in Iraq evolved over millennia to take varied forms, linking ancient traditions, religion, local and global contemporary influences. From traditional painting and sculpture to a longstanding tradition of visual art on buildings, the sector presents unique opportunities for Iraqi society. Indeed, visual art adorns the built environment as a key feature in architecture, on sites of conflict and destruction, and in the branding, packaging and decorating of street carts and vendors.

Calligraphy, like poetry, plays a vital role in the national identity. It presents a unique opportunity to link the traditions and heritage of the past with the present and future. Indeed, much of the visual arts sector focuses on social priorities and issues for the betterment of Iraqi society. Arabic calligraphy dates to the early days of Islam in the city of Kufa, Iraq, from which its name – Kufic script – is derived. The writing of the Qur'an, as the exact words of God, motivated Muslims in the early Abbasid period to dedicate a lot of care to calligraphy. Besides producing copies of the Qur'an, calligraphy was also used in secular texts, inscriptions in the public realm, on buildings, fashion and other objects. One of Iraq's earlier contributions was establishing the rules of Arabic calligraphy by Ibn Muqlah; Al-Bawwab adopted round script. In modern times, famous Iraqi calligrapher Hashim Al-Baghdadi revived interest in Arabic calligraphy across the Arab world with his own calligraphic works and authoring educational books on its many styles.

Calligraphy is a major component of contemporary design across the Arab world. In 2021, UNESCO declared it an "Intangible Cultural Heritage of Humanity". It is part of the Arab identity, and some of the widely recognisable Iraqi companies, such as Ridha Alwan Coffee, base their branding and awareness directly on their own personalised calligraphy style, designed by Iraqi creatives, which can be seen in its logo. In this supportive manner, the tradition of calligraphy formed the foundation for contemporary popular art calligraphy, which in turn supports the prestige, preservation, awareness and accessibility of this living intangible heritage today and into the future through product and branding design and social media.

Key challenges and recommendations are presented below while a wider assessment is available in the full research report.



Key challenges and recommendations are presented below while a wider assessment is available in the full research report.

Key Challenge	Recommendation
Lack of market size and sales potential	<p>Campaign to raise awareness of the value of Iraqi visual art and increase demand.</p> <p>Provide infrastructure, programming and exhibition support for galleries and spaces showing art.</p> <p>Develop schemes facilitating visual art to be shown in public buildings, hospitals, schools and private businesses.</p>
Lack of training and professional development opportunities	<p>Deliver specialised visual art courses and training modules.</p> <p>Incorporate regional and international experts in programme curriculum and delivery. Facilitate knowledge transfer, exchange and inspiration.</p> <p>Co-develop and design programmes with artists and young people.</p>

Decades of wars, destruction and displacement left us with wounds that must be healed with beauty, and in life, beauty perishes, but not in art. I believe that it is in the hands of creatives to take part in constructing what has been lost or forgotten.'

– Survey respondent



Religious arts

Religion and belief are at the foundation of much of the art, culture and creativity in Iraq. Iraq's religious arts extend back to the first civilisations.

Religious music has been important from the early days of Islam, when beautiful voices were chosen for recitation of the Qur'an as well as the call to prayers (adhaan). During the Abbasid period, religious singing developed to include poems of religious sentiments, such the praise of the Prophet. After the establishment of Shi'a Islam, different types of melodies were developed, such as Al-Raddat Al-Hussayneyyah and Latmeyyat Ashuraa, to praise Al-Hussain, his martyrdom, and the family of the Prophet.

Religious performing arts have a longstanding role in society today. During religious ceremonies, popular creative theatrical representations of the martyrdom of Al-Hussain are performed. Certain Sufi groups perform singing, and others also add dancing with religious subjects. Sufism and related creative performances exist in both Sunni and Shi'a Islam. Throughout the history of Iraq

Some culinary traditions – considered a creative sector by many – are related to and motivated by religious occasions, including harissa, Al-qeema al-Najafeyyah and khubz Al-Abbas, which are made and eaten during the main ceremonies of 'Ashura.

Religious visual art is an important part of the creative economy, alongside calligraphy. The Baghdadi school of decorative paintings started in the Abbasid period using floral and geometric decorations in the beginning of chapters and in the margins of pages of the Qur'an. Among the most important artists of the Baghdadi

school are Abdullah Bin Al-Fadl and Yehya Bin Hassan Al-Waseti. Some of their works are kept today in major international museums and libraries.

Religious literature has drawn from across the creative fields, as later, religiously inspired illustrations adorned books, some on scientific and medical texts, while others on literary publications such as Kalilah we Dimna and Maqamat Al-Hariri.

In the twentieth century, modern visual art of paintings and sculpture were pioneered by Iraqi artists like Jawad Selim. Furthermore, a more spontaneous popular art is produced on carts, tuk-tuks and shops. Political protests in recent years inspired spontaneous artists to produce graffiti in Baghdad and other Iraqi cities. Calligraphy forms a major pillar to Iraqi visual arts.

Another form of religious art is the popular paintings that express Shi'a religious subjects, such as the Battle of Karbala, and religious figures, such as Al-Hussain and Al-Abbas.

Similarly, Qur'an reading and religious expression are respected and valued creative pathways which can generate a viable income and livelihood. There is a growing demand for Qur'an readings, which are embedded in daily life, regularly hired at every funeral, wedding, ceremony, etc., and rates for these activities are rising as it is increasingly valued and demanded. Iraq has a longstanding tradition of religious singing, with legendary figures such as Mulla Uthman Al-Mawsili (1854-1923) paving the way through the art of the maqam al-'Iraqi, as well as performing mawlid and dhikr ceremonies, writing poetry and composing songs still used today in classical and religious Iraqi music.



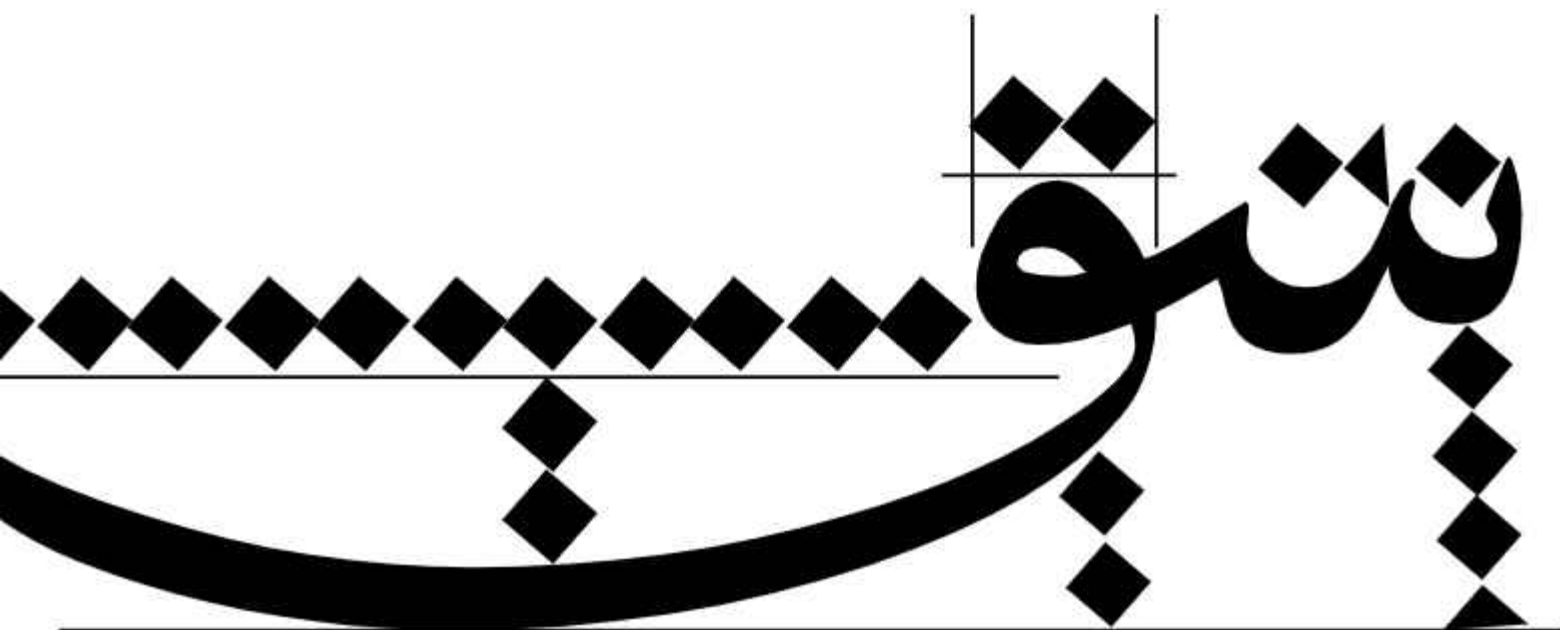
4.7 Handicrafts

The handicraft sector in Iraq spans the country. It draws on local traditions, techniques, tools and materials, bridging the past with the present. There is a drive to build capacity in the sector, particularly amongst women, so they can take the sector forward through training, coaching, and mentorship. Homewares, furniture, figurines, jewellery and clothing, candles and beauty products are characteristic of Iraq's handicraft sector.

The small and well-connected sector is clustered in Baghdad and Erbil, with smaller secondary centres like Duhok and Karbala. The industry is highly collaborative, organised and through informal networks, trade shows and fairs, markets and showrooms. People from across the sector are known to inspire, support and influence

each other. Influential promoters of the sector are the airports, foreign embassies, international development partners and multinationals acting as retail channels for handicraft enterprises.

There is a general lack of perceived value of Iraqi designed goods. While the value of local design and boutique production is gaining ground globally, the challenge of international competition, high costs and varying quality is a major barrier for the sector.





Key challenges and recommendations are presented below while a wider assessment is available in the full research report.

Key Challenge	Recommendation
Lack of financing for R&D, production, warehousing and shipping, human resources and sales	Develop accessible loans for the sector. Provide entrepreneurship training and develop investor readiness
Lack of sales and marketing	Support discoverability, awareness and wayfinding. Leverage and enhance quality assurance and kitemarks like "Made in Iraq". Invest in digital technology, online sales and social media. Provide capacity building in commercialisation, industrial design, merchandising, sales and distribution. Promote and market the sector at fairs, conferences and markets in Iraq and internationally. Improve regulatory environment to make sales, digital electronic payments and e-banking more accessible.
Lack of infrastructure, facilities equipment, tools and materials for production, storage, retail and showcasing	Develop shared services for buildings, facilities and other physical infrastructure for production, storage, retail and showcasing. Develop shared services for sourcing equipment, tools, materials and shipping to achieve economies of scale.



4.8 Advertising and Digital Media

Advertising and digital media represent one of the fastest-growing creative sectors in Iraq. They burst onto the scene in 2009 and are now considered among the most prominent segments of Iraq's creative economy. They harness the artforms of storytelling, scriptwriting, audiovisual production, design and advertising, helping break down barriers and change perceptions of Iraq domestically and internationally. In 2021 and 2022, the Al-Monitor reported "over a dozen YouTubers and dozens of famous Arab singers visited Iraq and extensively posted on their social media accounts about their stays" from across Europe, North America, MENA and the Far East.

And while this greenfield sector has been flourishing with its homegrown leadership, the lack of a long legacy of businesses, infrastructure and established leadership introduces some constraints on capacity development.





Key Challenges	Recommendation
Lack of finance in companies	<p>Raise awareness of the sector, the value of creative enterprises and their economic impact.</p> <p>Support business skills and investment readiness.</p>
Lack of skilled sector workforce, and shortage of business and technical skills	<p>Support development of major domestic flagship companies with global scale and reach to develop the workforce and talent pool.</p> <p>Provide training for business, technical and creative roles.</p> <p>Support business capacity development support and funding for business operations investment.</p>
Lack of business-to-business (B2B) sales and demand for advertising and digital media	<p>Raise awareness, promote the value and measure the economic contribution of Iraqi design and the wider creative economy.</p> <p>Develop procurement structures with government, international development partners and the private sector as key suppliers; early adoption by large public and private buyers can guide the market and stimulate wider demand.</p>
Lack of industry coordination; lack of industry advocacy and engagement with policy.	<p>Recommend establishing formal industry representation bodies such as industry associations.</p>

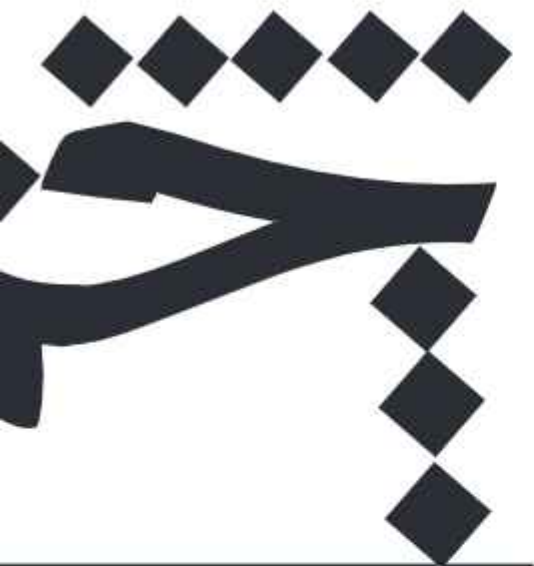


5. Thematic Findings

Iraq's creative industries were assessed by the themes of skills, policy, market and sales, finance, infrastructure and coordination across the sectors of screen, writing and literature, music, theatre and performing arts, cultural heritage, visual art, handicrafts and advertising and digital media. An overview of the themes is presented in the table below, where the degree of barriers facing each is marked by an H (for high barrier), M (for medium barrier) and L (for low barrier).



Barriers	Screen	Writing & Screen	Music	Theatre & Digital Media
Finance	H	M	M	L
Skills	H	H	H	H
Market & Sales	L	H	M	H
Policy	H	L	H	L
Infrastructure	H	M	H	M



	Cultural Heritage	Visual Art	Handcrafts	Advertising & Digital Media
	H	L	H	H
	H	H	H	H
	M	M	H	L
	H	H	M	M
	M	M	H	L

5.1 Finance

There is a general lack of finance across Iraq's economy. The competing priorities of security, education and health often overshadow financing for the creative economy. A general undervaluing of the creative economy leads to low levels of investment, though related areas like football more readily receive investment.

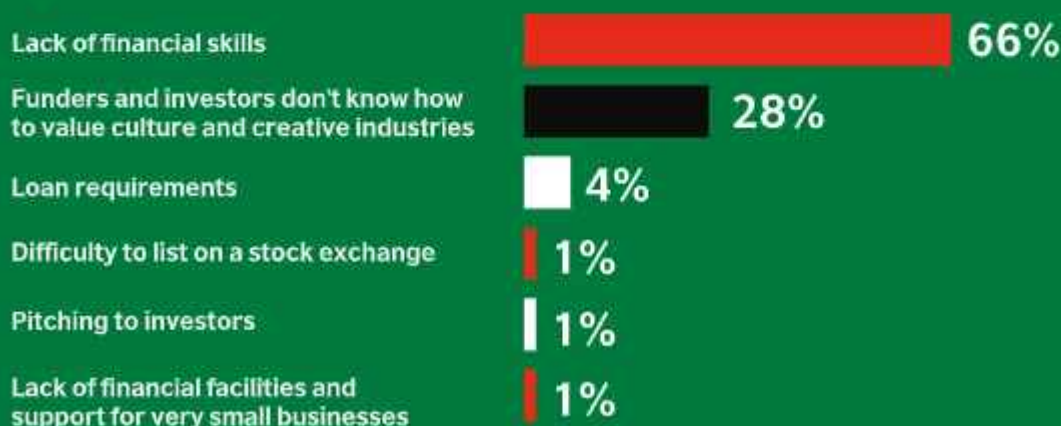
Significant barriers to the financing of industries in Iraq are constraining the development of cultural and creative industries. In 2020, domestic credit to the private sector in Iraq accounted for 13% of GDP, a strong improvement from 1.6% in 2005, but still far behind the 55% average in MENA countries. The World Bank ranked Iraq 186th out of 190 countries in terms of access to credit.

Industry members were surveyed to understand the barriers to investment, as illustrated below. The biggest

barrier to investment was considered a lack of financial skills, followed by a lack of funders and investors' understanding of how to value the sector (66% and 28% of survey responses). Other factors included a general aversion to risk, cultural norms and lack of funders and pitch opportunities available in Iraq.

In another question, survey respondents were asked about challenges facing the creative economy (see full report for details). They rated lack of investment and financial capital as the second biggest challenge (28% of survey respondents). And when asked what form of supply chain support was most needed by creative enterprises, financing support was rated second most needed (26% of survey respondents).

Figure 2: Barriers to investment



n=271. Source: Nordicity Iraq Creative Economy Survey 2022

Because of the private sector's informality and lack of credit history, banks view lending to SMEs as high risk and tend to do so at high premiums and collateral requirements, reducing the quantity of credit demanded. Thus, increasing the formalisation of businesses is an important step in expanding access to finance. In addition, bankers tend to have limited experience lending to SMEs, let alone creative enterprises, and often lack the necessary skills to adequately evaluate credit risk. Loan applications are onerous and time consuming for both parties, and as a result, only 5% of SMEs in the formal sector have received a bank loan, and under 3% of all firms in Iraq have financed investment projects through bank loans. In 2014, the CBI launched the One Trillion Iraqi Dinars initiative to expand access to finance for SMEs, providing finance to private banks to be loaned to SMEs, expanding access to credit – to which the creative economy is entitled.

Restrictions to digital e-payments are severely damaging to the whole of the creative economy. Digital e-payments are restricted nationwide, severely damaging the ability for businesses across the creative sectors to generate income, exports and facilitate safe transactions. Iraqi enterprise is excluded from the primary means of digital payments, with no access to global standard providers like PayPal and major global online markets like Amazon, eBay and Etsy. In 2017, 19% of Iraqis received a digital transfer of funds.

There is a role for microcredit. The gap between financial supply and demand may in part be alleviated through microcredit. The World Bank stresses the role of the microfinance sector in serving the gap between high demand for credit and the underdevelopment of the banking sector.



Mini Case: Microcredit: the story of Metrography

Metrography counts itself as Iraq's first and only photo agency, run by Ahmed Naim. It provides photo coverage of conflict in Iraq for local and international newspapers, such as The New York Times and Germany's Der Spiegel. Thanks to two micro-loans of \$25K from Relief International, the agency now employs 70 photographers across five offices in Iraq, including 15 female photojournalists.

The loans were primarily used for capital investments in cameras and laptops, which enabled the business to significantly expand operations.

5.2 Skills

Skills development is one of the biggest opportunities for the creative economy in Iraq. It is a priority for the sector and, as evidenced in this research, amongst the most sought-after forms of support by Iraq's creative practitioners, businesses, leaders and policy-level stakeholders. Skills shortages were rated by industry members as one of the biggest impediments to growth and sustainability for Iraq's creative businesses. On the other hand, due to the talent and potential of Iraqi creatives, skills were also rated as the third biggest strength of the creative economy by survey respondents.

For policymakers and institutions, skills development also directly contributes to supporting economic growth through improved employability, productivity, income and social sustainability. The success of the creative

economy will be determined largely by investment in the attraction, retention and development of a skilled and productive workforce.

There is an overall lack of creative, technical, and business skills. These shortages are shared by all creative sectors and exacerbated by a lack of formal training in all parts of the country. Moreover, as a nascent sector, there is a dearth of older and more established role models to learn from. Meanwhile, many people work multiple jobs, including those outside the creative economy, and are too stretched for time to develop their skills.

Survey respondents indicated the skills and training support needed most by the sector as illustrated in the figure below.

Figure 3: Skills and training support needed most by Iraq's creative economy



n=286. Source: Nordicity Creative Iraq Survey 2022

dustry members expressed the key gaps shared across sector as follows:

Lack of creative and technical skills	<p>The improvement of digital skills promises substantive opportunities for increased revenues (56% of survey respondents).</p> <p>Providing more production training is the second most needed form of support for improving the 'development, production and delivery' of creative goods and services (21% of survey respondents).</p> <p>A shortage of training and education for practitioners was the third biggest challenge facing Iraq's creative economy (14% of survey respondents).</p>
Lack of business and entrepreneurial skills	<p>Business and entrepreneurial skills training is the "enterprise support" most needed by creatives and businesses (40% of survey responses).</p> <p>A lack of financial skills is the biggest barrier to investment (66% of survey respondents).</p> <p>A shortage of sales and marketing skills was consistent throughout the consultations.</p> <p>A lack of advocacy, leadership and policy skills was raised throughout the consultations.</p> <p>A lack of soft skills was raised throughout the consultations.</p>
Lack of arts education in schools	<p>Investing in young people as future leaders was considered the third biggest potential driver of growth for the future of Iraq's creative economy (7% of survey respondents, shared with "leveraging culture heritage").</p> <p>Increasing arts education is the "skills and training support" most needed, followed by increasing awareness of where sector opportunities and resources can be found (56% and 27% of survey respondents respectively).</p> <p>Enhancing arts in schools was moderately rated as a policy area needing the most support (7% of survey respondents).</p>

For creative practitioners surveyed, the most important form of sector support sought was training in business and entrepreneurial skills. These skills shortages were raised extensively in consultations with workers who seek to advance their craft and careers as well as businesses that seek to grow their operations.

5.3 Market and Sales

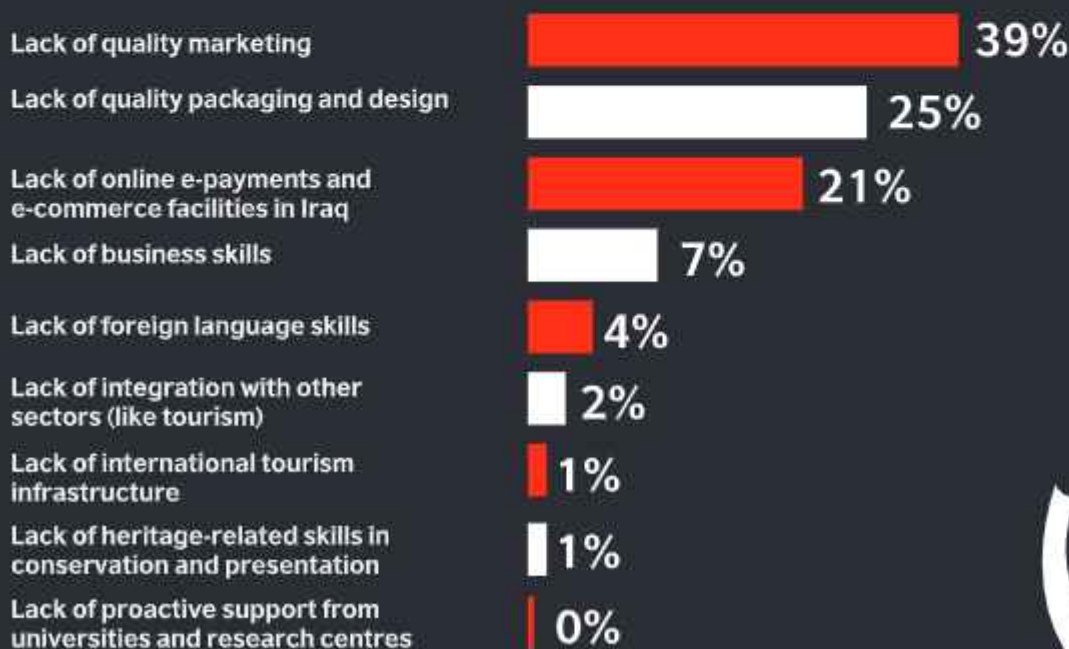
Market development and sales are a priority for Iraq's creative businesses. Industry members note a growing demand for Iraqi creative goods and services both domestically and internationally. The public has become more receptive to diverse and innovative artists and genres.

This demand, however, is not converted into markets and sales for creative businesses. In another question, respondents point to a lack of domestic market demand for Iraqi goods and services as the biggest challenge facing Iraq's creative economy (36% of

survey responses).

Market demand has been stifled as people do not see the value of paying for quality creative goods and services. This was considered a significant challenge facing Iraq's creative economy (7% of survey responses and a majority of consultations). In addition, raising the standards and quality assurance was rated as the third most important kind of support

Figure 4: Biggest sales challenges facing Iraq's creative economy



n=271. Source: Nordicity Iraq Creative Economy Survey 2022

needed for leadership (15% of survey responses and many consultations). Moreover, the cost competitiveness of Iraqi goods and services is low. It was ranked last amongst possible strengths in Iraq's creative economy (0% of survey responses, same as "the connection Iraqis have with other countries and peoples", and a consensus amongst consultations).



5.4 Policy

Appropriate policy is integral to the development of a thriving, inclusive and sustainable creative economy. Effective cultural policy decisions lead to achieving desired outcomes for citizens, creatives, businesses and government, with desired outcomes shared by all.

In one survey question, the creation of more jobs and businesses was projected as the most important benefit of investing in Iraq's creative economy, followed by peacebuilding (46% and 35% of survey respondents respectively). Connecting tourism with the creative economy was the biggest potential driver of growth for Iraq's creative economy, followed by supplying other sectors and adding value through creativity (58% and 21% of survey responses respectively).

In another survey question, the biggest challenge in creating a supportive policy environment was a lack of government understanding of the creative economy (74% of survey respondents), as illustrated in the chart below. As a result, establishing representative bodies or industry associations is the leadership support most needed, followed by dialogue with policymakers (42% and 33% of responses respectively).

Figure 5: Biggest policy challenges facing Iraq's creative economy



n=273. Source: Nordicity Iraq Creative Economy Survey 2022

Meanwhile, the consultations revealed the industry faces major policy challenges with copyright and IP, safety and security, lack of banking and payment options and challenges with movement. While these challenges did not rate as highly in the survey, they were considered critical by industry members. A wider appreciation for the social and economic value of the creative economy would raise its profile in policy discussions.



5.5 Infrastructure

Infrastructure is a major weakness in Iraq's creative economy. It consists of facilities, equipment, tools and materials, as well as the processes that drive creative businesses and enable creation, production and distribution.

Sector infrastructure is concentrated in the major cities. Indeed, cities like Baghdad, Erbil and Basra are home to most of the industry associations, institutions, facilities and equipment. But its reach is far wider, as much of the sector infrastructure can also be found online, where activities are increasingly done digitally.

Shortages in facilities, such as film sound stages and music recording studios, disrupt domestic supply chains, hinder finances and productivity, compromise quality and reduce output. A shortage of printing presses forces publishers to source printing from costly producers outside the country, and a lack of materials makes much of the country's handicraft sector dangerously reliant on imports and highly exposed to external trade factors from global supplies, tariffs, currency exchange, shipping and warehousing.

Equipment is essential for production in many sectors. A lack of equipment is one of the biggest challenges facing the cultural heritage sector, as it struggles with its world-leading collection of historic sites and artefacts. The sector also requires the equipment and corresponding skills to document, archive, preserve, restore and display these treasures of the world. To address the loss of books from years of conflict with ISIS, institutions in Mosul established book drives from partners around the world.

And where infrastructure is lacking, the sector has been innovative and adapted some solutions, such as repurposing, reactivating underused and meanwhile spaces, and working from home. Usually implemented as a temporary measure, these solutions are often insufficient and present major barriers to growth and sustainability.



5.6 Informal Economy

The informal economy is a major contributor to Iraq. A snapshot of Iraq's informal economy in 2021 estimates a total of 5.7 million people in Iraq with informal jobs (67% of total employment). This comprises 4.7 million people employed in Iraq's informal sector (55% of total employment) and 1 million people with informal employment within Iraq's formal sector. The informal economy is broadly defined as the "diversified set of economic activities, enterprises, jobs, and workers that are not regulated or protected by the state". A significant part of the creative economy remains informal, in Iraq and globally.

Most of the creative economy businesses and creatives alike are not formally registered as businesses. Only 70% of creative businesses and 11% of creative individuals responding to the survey were formally registered as a business, due to barriers to becoming registered and a distrust of data and information required. This registration status can have major negative effects on creative businesses, such as lack of attention and appreciation from government and investors.

Creatives and businesses responding to the survey were asked about their legal status. Of creatives, only 11% had formally registered as a business, and only 30% of businesses had.



“I am motivated to generate understanding among people.”

Iraqi Creative

5.7 Inclusive Growth

Developing Iraq's cultural and creative industries presents an opportunity to foster inclusive growth—economic and social growth that is distributed equitably and reduces inequalities. Carefully designed policies can ensure that economic growth is shared across Iraqi society and that it serves to uplift underrepresented or marginalised groups.

The research explored how the creative economy supports underrepresented groups in Iraq, helps bridge the intergenerational gap, builds connections among the people from across the country, and furthers the inclusive growth and sustainable development of the country—all amplified through a people-centred cultural development approach.

According to survey respondents, the vast majority (95%) agree their work should have a wider societal impact, and nearly half (47%) indicated that the diversity of the Iraqi people was one of the creative economy's greatest strengths. Moreover, the survey results indicated that “investing in young people as the future leaders of the creative economy” is the most important potential driver of growth for the future of Iraq's creative economy.

Research conversations further confirmed the overlap between the creative economy and social impact, for instance, by highlighting its potential to support women and equity-deserving groups and to promote cross-cultural and intergenerational understanding. Taken together, the results suggest that Iraqi creatives support the potential for cultural and creative industries to support inclusive growth.

“The major intergenerational gap is to the detriment of not only the creative economy, but the country as a whole.”

Iraqi Creative

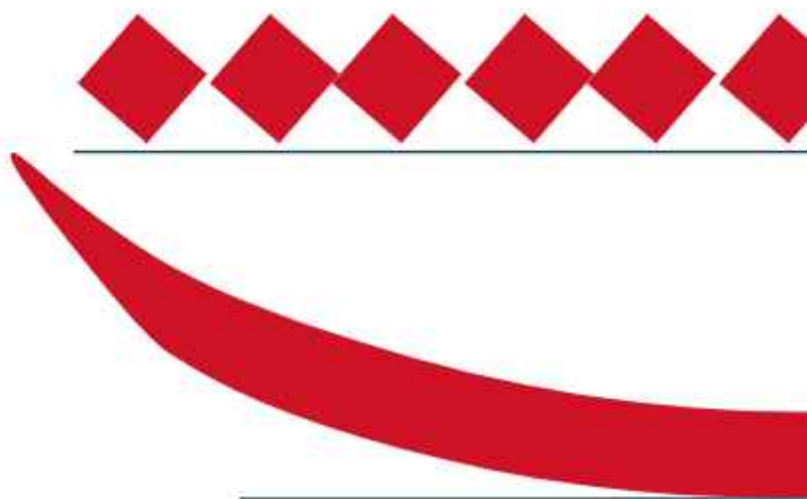


Mini Case Study: Sisterhood Products

Sisterhood products is a social enterprise led by Dr Sarah AK Ahmed that supports the skills development of Iraqi women. When this beauty product business started in 2015 in a makerspace in Sulaymaniyah, it contended with limited local demand for Iraqi products and competition from international markets such as China, Turkey, and Iran. Sisterhood gained support from USAID through the Prosperity Institute programme to enter US markets, enabling it to expand.

Sisterhood's goals have since evolved with its employees at the core. Dr Ahmed aims to transition Sisterhood into an employee-owned cooperative owned and operated by its nine full-time female employees. She places staff development at the heart of Sisterhood, and Sisterhood also involves staff in research and development. By participating in market research and marketing, employees learn new skills, develop capacity, and have greater ownership over their work.

This grassroots initiative from the handicraft sector demonstrates the potential for Iraq's creative economy to advance gender equality, support learning, and generate social impact.





5.8 Conflict and Peacebuilding

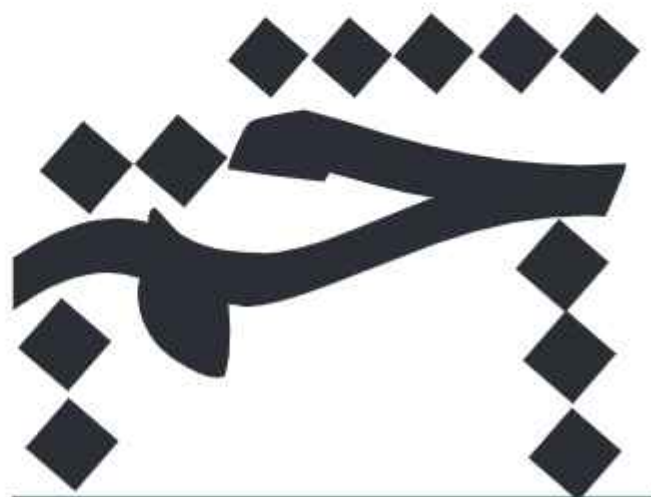
Through periods of conflict and instability into a new phase of development, Iraq's cultural and creative industries have proved resilient. Despite war, sanctions, occupation and conflict, Iraqi creatives have persisted. As Iraq continues its transition into an era of peacebuilding, arts and culture practitioners are aware of the role they can play in helping society rebuild and reconnect.

Linkages between culture and peacebuilding are growing. The potential for arts and culture to reduce economic, environmental, political, security, and societal fragility in fragile and conflict-affected states is evident in consultations with Iraqis from Mosul and Basra. These findings mirror research by Balta and Baily, which also points to some key challenges of incorporating culture into broader peacebuilding.

Conflict and instability have severely impacted Iraq's cultural sector, and attention to cultural activities and the ongoing efforts of artists and cultural practitioners can support peacebuilding efforts.

The research suggests that Iraq's creative economy supports peacebuilding by:

1. Facilitating dialogue to build trust in people and institutions.
2. Acting as a site of advocacy for citizens' needs and stimulating civic engagement.
3. Restoring, rebuilding, and protecting tangible cultural heritage.
4. Sharing Iraq's stories and giving visibility to issues and people at risk.
5. Supporting community building and social cohesion.
6. Providing therapeutic outlets to ease collective mental strain.
7. Making space for everyone to contribute, including international partners.
8. Supporting capacity building for the next generation of Iraqi creatives.





6. Recommend

The research identified key recommendations for the creative economy at the grassroots level, enterprise level, leadership level and policy level. The ziggurat approach, modelled on the ancient Mesopotamian tower structure from a



Recommendations Ziggurat

Recommendations for how to support Iraq's
creative sector ecosystem level,
industry level, and policy level in a progressive
way, inspired by the structure of
the traditional Ziggurat (a stepped
pyramid structure in ancient Mesopotamia).

Policy Leadership

Assess the Economic Impact: Measure the contribution of the creative economy.

Support Policy Research: Support Iraqi policy-level stakeholders in developing evidence-based policy for the creative economy.

Establish a National Advisory Group: Form a national advisory group to represent the creative economy, connect industry members, policymakers, and development partners.

Connect Policy Level Stakeholders: Connect Iraqi policymakers, international development partners and institutions through meetings, forums and groups.

Address Regulatory Challenges: Address regulatory challenges for business registration, digital banking, e-payments, online sales platforms, copyright and intellectual property protection.

Build Policy Representation: Represent the creative economy sector at the policy-making level.

Build Industry Capacity: Establish and support industry associations to build sector capacity, coordination, and leadership.

Enhance Association Governance: Support capacity development in industry associations with governance, strategic planning, best practices, mentorship, and knowledge exchange with international associations.

Develop Localised Training: Facilitate Iraqi-led training programs for leadership development and "train the trainer" style learning.

Support Networking and Training: Support networking and training opportunities for associations and representative groups.

Future Leader Development: Provide leadership training and succession planning for high-potential future leaders in the creative economy.

Enterprise Ecosystem

Support Skills Development: Develop a creative economy training program to develop skills, network, raise awareness, and engage with policy- and leadership-level stakeholders.

Provide Industry-Specific Training: Provide sector-specific creative and technical training tailored to industry needs to advance the cutting edge of the sector.

Develop Expert-Led Programming: Commission creative sector experts to deliver tailored programming for creatives.

Deliver Tailored Training: Commission Iraqi and international expert practitioners to tailor and deliver training in person and remotely.

Support Physical Infrastructure: Support creative organizations by obtaining, maintaining, and improving their physical infrastructure, buildings, and facilities at risk.

Support Supply Chain Development: Support creative organizations by obtaining, maintaining, and improving their access to equipment, tools, materials, and supplies to enhance the supply chain.

Focus on Key Sectors: Focus early support on the film, literature, festivals and events sectors.

Embrace Inclusivity: Develop interventions through an inclusive and participatory approach.

Develop National Network: Establish a national creative economy network for stakeholders across the creative ecosystem to connect, coordinate, and empower.

Foster Information Exchange: Facilitate communication, information exchange, and knowledge transfer across the creative economy through newsletters, social media, shared calendars, databases/platforms, websites, or directories.

Enhance Physical and Digital Networks: Support physical and online digital networks to build and formalize communities.

Connect with Policymakers: Strengthen connections between the creative community and policy-level decision-makers.

Facilitate Knowledge Exchange: Facilitate knowledge, information sharing and coordination, wayfinding and referral systems.

7. Conclusion

Focus on Key Sectors: Focus early support on the film, literature, festivals and events sectors.

Embrace Inclusivity: Develop interventions through an inclusive and participatory approach.

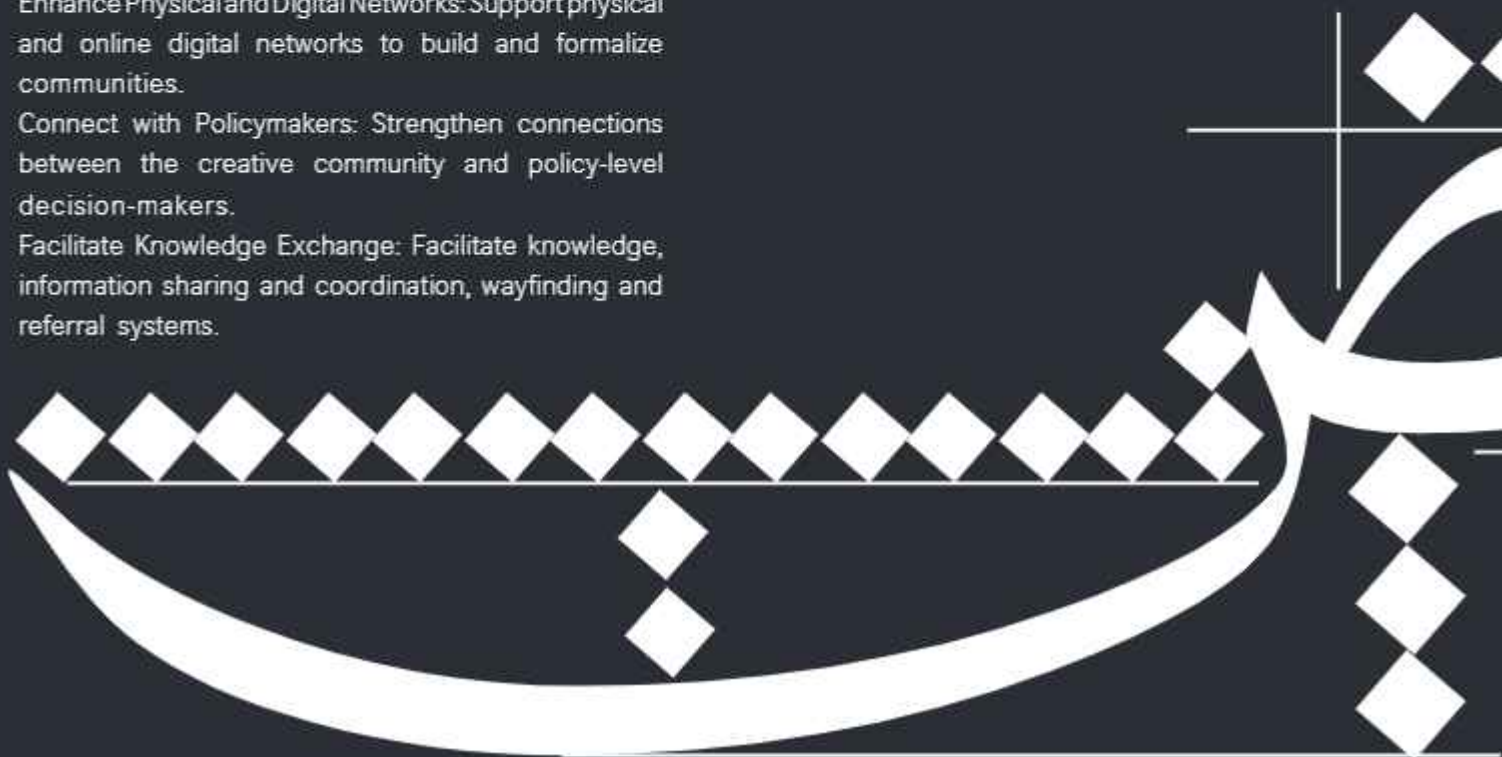
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Nordicity

Nordicity is a research and evaluation, strategy, policy and economic analysis for the arts, cultural and creative industries.

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