



Framework Contract Commission – Lot 1

MED CULTURE PROGRAMME

**Identification and Feasibility Mechanisms for a Programme Dedicated to Culture in the
Med region - Culture as a Strategic Factor of Political, Economic and Social
Development**

Request N° 2011/270633

(Author: Ignasi Guardans, Ph.D)

February 2013

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I. INTRODUCTION

1. It was UNCTAD, the United Nations Commission for Trade and Development, who introduced the topic of the "**creative economy**" in the world economic and development agenda. In its own terms¹, "the creative economy is an emerging concept dealing with the interface between creativity, culture, economics and technology in a contemporary world dominated by images, sounds, texts and symbols. Today, the creative industries are among the most dynamic sectors in the world economy providing new opportunities for developing countries to advance into emerging high-growth areas of the world economy. (...) The creative industries are at the crossroads of the arts, culture, business and technology. All these activities are intensive in creative skills and can generate income through trade and intellectual property rights". It is a belatedly discovered truth that "adequately nurtured, creativity fuels culture, infuses a human-centered development and constitutes the key ingredient for job creation, innovation and trade while contributing to social inclusion, cultural diversity and environmental sustainability"²

2. Such is the perspective behind this report. In Europe, a critical juncture in the understanding this dimension came with the publication of the report "The economy of culture in Europe"³.

The study structures the concept of Culture and Creative Industries in the following way: **The "cultural sector", divided in**

a) Non-industrial sectors producing non-reproducible goods and services aimed at being "consumed" on the spot (a concert, an art fair, an exhibition). These are the arts field (visual arts including paintings, sculpture, craft, photography; the arts and antique markets; performing arts including opera, orchestra, theatre, dance, circus; and heritage including museums, heritage sites, archaeological sites, libraries and archives), and

b) Industrial sectors producing cultural products aimed at mass reproduction, mass-dissemination and exports (for example, a book, a film, a sound recording). These are "cultural industries" including film and video, video-games, broadcasting, music, book and press publishing. And **the "creative sector"** in which culture becomes a "creative" input in the production of non-cultural goods. It includes activities such as design (fashion design, interior design, and product design), architecture, and advertising. Creativity is understood in the study as the use of cultural resources as an intermediate consumption in the production process of non-cultural sectors, and thereby as a source of innovation. Consequently the study's scope of investigation is the "cultural & creative sector". This approach enables them

¹ <http://unctad.org/en/Pages/DITC/CreativeEconomy/Creative-Economy-Programme.aspx>

² UNCTAD, Creative Economy Report 2010, p. XIX. This extensive document, although as limited as the sources it is based on, is an outstanding approach to this issue. The mission preceding this report, and almost each interview around it just confirms the importance of this approach.

³ A study prepared by different partners for the European Commission (Directorate-General for Education and Culture) in October 2006.

to measure more accurately the economic and social, direct and indirect impact of culture and creativity⁴.

3. This report is extremely more modest in its scope and depth, but looks into the reality of Morocco and Egypt from that same angle. It is based on information obtained from available publications, including media; on the answers to a set of questionnaires sent to a large list of cultural players in the region⁵ and, essentially, on the content of long interviews with relevant stakeholders and authorities in both countries in January 2013.

4. The author of this report is fully aware of the huge importance of the **digital dimension** in the transformation of cultural and creative industries and of culture consumption and distribution in general. However, at the time of this study, such a revolution is marginal in the analyzed countries. Since this is supposed to be a study on the current situation, and not on what it could be or look like in a theoretical world, the approach may sound somehow old if read bearing in mind Europe's cultural realities and challenges⁶.

5. The **data** mentioned in the report have been partly obtained from official, or at least documented sources, but in other cases information is selected content from the interviews, with the corresponding risk of inaccuracy. They should all be taken as an orientation, good enough in the understanding of a described reality, but not in scientific unchallengeable terms.

The **lack of reliable data in the cultural field** is a common characteristic of both countries studied, although in different terms.

6. In Egypt, the **Central Agency for Public Mobilization and Statistics (CAPMAS)**, a governmental organization independent from any ministry, includes "Culture" as a specific chapter of its publicized data⁷. Its data have two sorts of origins: surveys based on polls via questionnaires sent throughout the country; and official data obtained from civil servants in charge of government controlled structures. Apart from that, its "Employment" section also offers some light on the CCIs. Even if they basically refer to the Governments' own activity

⁴ See "The economy of culture", p. 2

⁵ A total of 98 Questionnaires were sent to an initially identified list of cultural organizations. We received 6 full replies. The list was based partly on the rapporteurs' own information, but also on the data base published by the Fondation René Seydoux (<http://www.fondation-seydoux.org/pages/repertoire/presenta.html>)

⁶ A recent analysis on the European situation produced in terms of European policy, which would certainly be very different if applied to the countries in this report, and the Mediterranean Region in general, is found at Jean Paul Simon and Marc Bogdanowicz: "The Digital Shift in the Media and Content Industries", Joint Research Centre, European Commission, 2012

<http://ftp.jrc.es/EURdoc/JRC77932.pdf>

⁷ <http://www.capmas.gov.eg/?lang=2> The English online statistics version is slightly shorter and less detailed than its Arabic original. Surprisingly, even the existence of these statistics is unknown to many cultural players in the country, including high officials working in Government.

(that is, the independent cultural activity is poorly or not reflected at all), there are some interesting figures in those materials, but certainly not enough in the context of this report. However, they prove that the instrument is efficient and ready to provide better answers, if it is decided to put the right questions and to introduce them in the procedures⁸.

7. In **Morocco**, the lack of official and updated figures in the field of culture is a natural result of the deep structural disarray and disorder of the cultural activity in the country. There is no reliable cultural data in a country where –according to some interviewed experts- almost 20% of its publications do not respect the legal deposit; or in a country where only a very small part of its artists register their songs for copyright purposes, just to quote two examples. A quantification effort was made in 2006, in the context of Morocco's 50th anniversary of independence⁹, but it has not been updated since. A private effort worth mentioning is on its way right now, promoted by the Association "Racines" and the Centre d'Études Sociales, Économiques et Managériales (CESEM), to produce before two years a sort of inventory or "**Etats Généraux de la Culture**"¹⁰. Another accounting exercise of the situation was the result of a meeting held in Casablanca on June 29, 2012. Different artists and intellectuals were working for three months to identify the main problems affecting culture in the country, of which they collected data on several cultural industries. The result is a challenging document, which is used thoroughly in this report¹¹.

8. Needless to say, an improvement in quantifying the impact of creative economy would be extremely useful to better elaborate policy, improve target decisions and programs. This consideration is relevant, but is not the only element of importance. As it happened in other places, including Europe as a whole, politicians and decision makers come to a better understanding -- through proper figures and data -- of the impact of cultural and creative activities in their countries' **job growth and social development**, including the very important **local impact**¹² This in turn, may have a long-term impact in planning, in structural reform and in the allocation of public resources.

⁸ CAPMAS officials confirm that an economic approach to the analysis of culture has never been in their objectives; however, they have more data than those actually published, and they could actually cut and cross their information in a way much closer to the current European or even UNCTAD's approach.

⁹ 50 ans de développement humain & perspectives 2025; Cinquantenaire de l'Indépendance du Royaume du Maroc : «Dimensions Culturelles, Artistiques et Spirituelles» Rapport Thématique élaboré par Mohamed Tozi.

¹⁰ This important project, funded with the support of the Ministry of Culture, Norway's Mimeta Foundation for Culture and Development (www.mimeta.org) and the British Council, is under the responsibility of Aadel Essaadani et Driss Ksikes, both interviewees for this report.

¹¹ "Pour un Maroc de la Culture", Actes du Colloque, Casablanca 29 juin 2012.

¹² Culture, from a perspective of its **local impact**, has been called the "**Fourth Pillar of Sustainable Development**" See for example the *Policy Statement* approved on 17 November 2010, in the framework of the World Summit of Local and Regional Leaders- 3rd World Congress of UCLG, held in Mexico DF; and the Document "Rio+20 and culture: Advocating for Culture as a Pillar of Sustainability", An initiative by the Committee on culture of United Cities and Local Governments (UCLG),

9. With these limitations, what follows is the most accurate possible description of both countries' cultural reality generated from the mentioned sources and as examined in the restricted time and remit terms of this mandate¹³.

(2012http://www.agenda21culture.net/index.php?option=com_content&view=article&id=139:report-6-rio20-and-culture-advocating-for-culture-as-a-pillar-of-sustainability&catid=58&lang=en&Itemid=0)

¹³ The mandate for this report excluded Cinema and audiovisual arts as well as Cultural Heritage. And, in the case of Egypt, requested that particular attention was to be placed on the realities taking place (or having an impact) outside Cairo.

II.THE STRUCTURES BEHIND CULTURE AND CULTURAL INDUSTRIES: THE PLAYERS AND THEIR RELATIONSHIPS

10. As we know, only recently have culture and the globally called Culture and Creative Industries or CCIs been considered as a sector of the economy and quite possibly a consistent “sector” of social and political life. Such an approach allows a **horizontal analysis of the essential structural elements** which have an impact in the reality of creativity and culture, and in the activities deriving from it; in the various elements linked to production, management, funding, trade related to culture and CCIs; in those involved in training; and finally the governmental structures with an impact on it.

11. Through the succession of interviews that preceded this report and an analysis of available documentation, what follows intends to be a description of the main components of such a reality, with a description of the main actors who are behind culture and CCIs in Morocco and in Egypt. It is partially a context taken at a precise moment in both countries’ history. But, as it would be the case if this same exercise was done with any other sector, from education to defense or social welfare, there is undoubtedly elements with an essential connection with either countries’ history, traits and character.

II.1 The public players

12. The first distinction among these, with an impact in this sector, can be done between **those who are part of the State**, essentially funded by public money and subject to public law regulations and criteria (II.1), **and the others** (II.2). Within the public group we can also introduce, (if not more, for the sake of clarification, but also due to what that means in terms of social perception) a distinction between those public institutions with actual decision making power and a political nature (II.1.1), and those organizations which are part of the public sector but cannot be considered political in themselves (II.1.2); to this group of actors we can add what we can consider foreign public actors (II.1.3)

II.1.1 Public players with political decision making power

MOROCCO

13. Several Ministries have some sort of responsibility and can have a direct impact on the situation of culture and CCIs in Morocco, through general policy or through the management of instruments directly affecting that reality.

To this, a special mention needs to be added regarding what we can call the Royal Palace.

14. The **Ministry of Culture**, as many other aspects in Morocco's government, is basically inspired by organizational terms in the French equivalent. But of course, on a much smaller scale. The Ministry's budget in 2011 was 513 million dirham¹⁴ (MAD). This represented a 0,3% of the total State budget¹⁵. In 2013, the allocated budget for culture is 571 million dirhams (51 million €)¹⁶.

15. In 2011, with a **budget** of 323 million dirham, 63%, was dedicated to salaries and current expenses, 190 millions MAD were dedicated to investments, such as the reinforcement of infrastructures and cultural installations, extension of the network of cultural centres and organizations dedicated to lecture, modernization of equipment for artistic establishments and preservation of cultural heritage. The budget allocation for investments in 2013 is higher, 217 million dirhams.

16. The figures of **direct subsidies** to culture are not easy to obtain, nor its beneficiaries transparently identified. Based on the interviews with public officials, it can be said that the budget for subsidies to "music activities" in 2012 was 4,5 million MAD; and that a total amount of 6 million MAD was spent in supporting cultural associations.

17. The Ministry directly controls most of the **cultural infrastructures** in the country, such as museums, libraries and archaeological sites. It has important plans related to the development of cultural infra-structures, which are supposed to be developed through the country in the coming years. The planned schedule for execution in no less than 20 years. This plan includes, for example, the creation of a large network of libraries and mediatheques throughout the country. It is indeed a solid long term objective which, when it is compared to today's reality regarding such facilities, few people consider realistic without a generous budgetary increase, and a degree of commitment which is not easy to find in those who are supposed to implement it.

¹⁴ 1 euro = 11,1 MAD

¹⁵ For the sake of comparison, here are some other figures (according to the Report with the minutes of "Pour un Maroc de la Culture", Actes du Colloque, Casablanca 29 juin 2012): the described budget for 2011 represents 15,5 MAD per inhabitant; in Tunisia, in 2011, the Culture budget was a billion MAD, 100 MAD/inhabitant; in Algeria, it was 2,6 billion MAD, 79 MAD/inhabitant. The budget for France's Ministry of Culture in 2012 was 7,4 billion€, which would represent 1.300 MAD/inhabitant. In terms of percentage of Culture within the total State budget, the highest in Europe is France, which has never gone beyond 1%. It is to be noted however that any such a comparison is extremely complicated, among other reasons since it should take into account the existence of State agencies in the field of culture with a semi-independent budget. For an approach into the complexity of calculation such a budget distribution regarding culture, based on the French model, see "Budget de l'Etat: Retrospective. Etat, Culture et Budget. Culture et Médias 2030, Perspectives de politiques culturelles ». Ministère de la Culture et de la Communication, Secrétariat Général .

¹⁶ Projet de loi des finances 2013, Annex I. « La_vie_ éco », Documents. http://www.lavieeco.com/documents_officiels/Note%20de%20presentation%20projet%20loi%20finances%202013%20-Maroc.pdf

18. The Ministry is also responsible for most, but not all of the **public education and arts-related training**. Regarding cultural activity in itself, the Ministry of Culture is the direct promoter of 30 different cultural festivals through the country, and the supporter of others, together with support for other cultural activities: in many cases, this is not done through direct economic support, but indirectly through other means (public spaces, payment for catalogue...

19. Finally, the Ministry has the responsibility of organizing the **social aspects of the cultural activity** for professionals, such as the granting of ID cards that identify someone as an artist (Carnet d'artiste), which subsequently provides some social benefits.

20. The Delegations of the Ministry of Culture in the provinces may have their own initiative that supports cultural activities, which is subject to the almost discretionary decision of the delegates. While the budgets are very small, they may have an essential impact on specific events, such as exhibitions or a local concert.

The international activities related to culture which are channelled through institutional public structures are under the direct decision and funding control of the Ministry of Culture. There is some criticism towards the Government's excessive control over imported cultural events from abroad and towards the confusing management of their funding¹⁷.

21. In theory, the Ministry of Culture deals on an equal basis with the different **cultural identities present in Morocco**. However, on the initiative of King Mohamed VI, a specific body promoting and supporting amazigh culture was created by law in 2001, the **IRCAM (Institut Royal pour la Culture Amazigh)**. Although IRCAM behaves in many aspects as a sub-ministry for the amazigh cultural development, it is legally just a research centre, and advisory institution to the King and to the Government. It has an annual budget of 66.600.000 dirhams. Among its activities the majority is dedicated to identification, preservation and valorisation of the amazigh's cultural heritage, most of it immaterial: mainly arts and crafts, but also music. IRCAM has a complex legal framework restricting what it can and cannot do. However, it extends its influence through other means: conventions signed with several Ministries turn the organization and its "Rector" into some sort of Ombudsman of the amazigh culture; its 11 yearly awards (for cinema, literature, ancient music, modern dance, etc..., at 50.000 MAD each); publications; and above all, the direct funding of around 500 associations working with the bereber people and culture, which takes between 15% and 20% of its budget. All this is turning IRCAM into a strange administrative animal that is socially

¹⁷ One recent example of this: a theatre company travelling to Belgium to attend a large cultural event ("DabaMaroc") was told by the Ministry that part of its expenses would be channelled through the National Theatre in Rabat. As a result, that theatre did pay those expenses, but cancelled another activity already programmed with that company. In other words, a performance in Brussels was paid with public funds... at the expense of a performance already booked in Rabat.

recognized and well respected,¹⁸ and with more opportunities to collaborate with civil society and NGOs than any other public organization.

22. The **Ministry of Communications** is responsible for some training or educational institutions with an impact on this sector, such as the Institut Supérieur d'Information et de Communication (ISIC). It has also the authority over the Bureau Marocain des Droits d'Auteur (BMDA), Morocco's Intellectual property collecting society.

There have been communication difficulties between Communications and Culture, since their areas of influence are getting increasingly interconnected. This is particularly evident and direct in the case of intellectual property management and the BMDA, which the Ministry of Culture considers should be under its jurisdiction. And, according to several interviewees, the lack of coordination between them both is not altogether helpful, in particular regarding the activities and objectives of the educational institutions under their respective surveillance.

23. The **Ministry of Higher Education** has the direct authority ("la tutelle") over several public training and education centers directly related to this area. The **Ministry of Youth and Sports** plays (or one could say, could play) an essential role in Morocco's cultural life, since it controls the hundreds of "Youth houses", "Maisons de Jeunes", extending around the country. As it will be mentioned later, these spaces, often under-used and managed without any consistent cultural policy planning, are potentially the best possible cultural infrastructure in many places.

24. The **Ministry of Interior** is particularly relevant in this context, since it has the authority over the "collectivités locales": **regions, provinces and local authorities**. Morocco is implementing a moderate de-centralization. There are now 16 regions, 62 provinces and 1497 urban and rural local communities. This is not the place to evaluate the real results of this decentralization process, but it is relevant to underscore these decentralized bodies expressly manage (and sometimes have consultative powers) in many aspects related to culture: preservation and valorization of cultural heritage, and the construction, management and conservation of "socio-cultural and sports premises which may contribute to improve the life of citizens"¹⁹. As an example of this influence, 8 of the 9 conservatories in Casablanca are managed by the local authority, thus under the high authority of the Ministry of Interior and outside any control of the Ministry of Culture²⁰ These powers and capacities acquire a particular significance for one important reason: local authorities are relatively rich. According

¹⁸ Perceptions around IRCAM belong to the half full-half empty bottle logic. For some it is just a governmental instrument to "anesthetize" the political debate on the rights of the amazigh people; for others it is exactly the contrary, the strongest instrument that culture has, benefitting from public funding and some sort of indirect public power.

¹⁹ Loi 79-00, article 36 ;

²⁰ "Pour un Maroc de la Culture", Actes du Colloque, Casablanca 29 juin 2012, p. 10.

to media reports²¹, local authorities had in 2011 a surplus of 25 billion dirhams (and 19 billion in 2010).

Cities, within their own managing and budgetary autonomy, but under the patronage of the Ministry of Interior, play a role in the promotion and support of cultural activities (festivals in particular), and potentially in the support to cultural associations. Sometimes associations and cultural promoters complain that this support, when it exists, is rarely offered in financial terms, and is rather restricted to informal offers of equipment or free space. This is a fact that very much restricts or limits the possible support which can actually help a new activity to start or develop²². Some cities also have jurisdiction over arts and culture training centers²³

25. It is fair to say that local authorities (which, as said, include provinces) could play a very important role in supporting and promoting culture development in the country. This is today in contrast with a reality of grave accusations of corruption, cronyism, ignorance and/or pure lack of interest on what culture and the creative industries may represent. Criticisms extended to a very large part of the thousands of the civil servants working there, many of whom are accused of resistance to any possible change of objectives and methods.

26. But while this general state of things must have some truth if this negative perception is so generally extended, it is also undeniable that recent political changes implementing a more real democracy in the country are starting to create a natural effect: **public accountability** of officials in front of their citizens..An accountability with a natural impact in local elections, which is to be seen in combination with the reality of a more open and freer press (with an impact in the cities at least). As a result, a **higher social awareness** on the importance of culture and the need for cultural equipments may have a progressive impact in the 26.229 locally elected officials in the country “Les élus”, “the elected”, as people often call them, have a new role to play if their election actually depends on the satisfaction of real voters, and if a majority of these voters become aware of what is at stake here.

²¹ Bladi.net, Mai 9, 2012 : www.bladi.net/maroc-collectivités-locales-riches.html

²² An example of this situation can be **Awaln’Art**, “**International Artistic Encounters in Public Spaces**”, which has already finished its 7th edition. This high quality and highly professional event, promoted by the Collectif Eclats de Lune (www.awlanart.com) turns around a set of giant puppets and other activities which have a direct local impact in Meknes, which has been well appreciated by the local authorities, as it actively involves young people working in the design and arts & crafts preparation, for a large period of time. Other cities in Morocco have approached the promoter, an experienced cultural manager who is applying in his native country many year of experience acquired in Paris and Avignon. But even if they understand the impact a similar event can have among them, they just offer public space, which is certainly not enough.

²³ This authority extends to all management aspects, in principle not to content of the training. Such is the case of eight out of nine conservatories in Casablanca.

27. A mention can be made in this context to the role of **Walis and Governors**. There are 17 wilayas, regions, and as many walis in the country, directly appointed by the King, representing the highest authority in the region. The walis assume also the mandate as governors in the main province and other are governors are appointed for the others. In a country where subsidies are not objectively granted, where the use of public spaces is strongly intervened by administrative procedures, and where the King himself may have an impact in the support to cultural activities, Walis and Governors play sometimes, very much depending on the personal character and even cultural interests of the individual concerned, an indefinite role but important role in the financial and organizational aspects of cultural activities which is not easy to detail. This can affect the life of an association, the strength or weakness of a cultural festival, the speed with which an authorization is granted...

28. Other Ministries can be mentioned: the **Ministry of relations with the Parliament and Civil society** is formally in charge of modernizing the rules on associations and the limits of Government intervention, both essential elements to consider when observing the cultural fabric of the country. The **Ministry of Tourism** directly supports some festivals which, in their own independent judgment, is considered potential touristic impact. As far as it has been possible to assess it, there is no connections with the Ministry of Culture in this decision making process. The **Ministry of Arts & Crafts** is responsible for an area which employs 2,2 million people: this figure includes shoe- or furniture makers, but also 371.000 people who can be described, in the words of the Minister, as involved in activities “of high cultural value”²⁴. The Ministry is responsible for almost every single aspect related to this creative industry: training, innovation, financing, social protection, and the support to the development of better means of trade and export.

29. The intervention of **the Royal Palace** in Morocco’s cultural life introduces a very special dimension in any description of that reality. It is publicly acknowledged that the King, with his own personal budget, can subsidize cultural activities. This is not done on a regular basis, but it can affect several entities of the same kind. For example, in 2007, several bands integrated in the so-called “new wave”, such as the extremely popular hip-hop band H-Kayne, publicly received each a check of 250.000 MAD from the King.

30. Another well-known example is the festival of **Mawazine**, in Rabat. This huge cultural event, totally disproportionate to the rest of Morocco’s cultural reality, is largely acknowledged as being an initiative from (and linked to) the Royal Palace²⁵. Several interviewed professionals and cultural experts raise doubts regarding the accuracy of the figures contained in its published budget; State owned companies, attending requests to do so, have concentrated most of their sponsorship budget in this festival, actually cutting off other

²⁴ M. A. Kayouh, Interview on « Jeune Afrique », July 24 2012.

²⁵ The Festival is formally promoted by an Association, **Maroc Cultures**. Its members are not easy to identify, and there is a general perception that it is an organization fully promoted and supported from the Royal Palace

sponsorship options in other festivals. In other words, the Royal Palace is perceived as a public actor in itself, separated from the public policy lines designed by the Government. It is interesting to note, though, the completely different social perception and valorization by cultural stakeholders on the role of Government (and public bodies in general, including local authorities) and anything related to the Royal Palace. Mistrust and open criticism is a universal rule on the former, to the extent of making it very difficult to imagine any solid public/private partnership involving the players described in this section and civil society. On the contrary, the interventions from the Royal Palace are perceived, although not unanimously, as generous, well respected decisions in favor of the people to correct malfunctions of the system, generally based on a commitment to culture and its significance.

31. One could imagine that such a great amount of public offices being concerned with culture, with its creation and its expression, would put it at the very centre of governmental action. It is certainly not the case. Not only the very concept of creative economy and the existence of culture and creative “industry” appears as completely remote to decision makers, and is not reflected in any common policy. And, even assuming the best goodwill from all those players, it can be said that there is an **excessive diversity of public authorities** playing a potential role in the direct support of culture. This would even be a problem in the most efficient and well organized government; it is more than a problem if there is no common policy behind all this activity and decision making, nor actual coordination or in some circumstance no basic communication. It is a dangerous formula, and when this situation is combined with subsidies granted without the framework of objective, credible and respected rules, the result does not help in terms of sustainability of cultural projects and development of a real cultural fabric.

EGYPT

32. The **political situation in Egypt** coinciding with the drafting of this report, and during the mission in the country, does not require a long presentation. The country is immersed in a process which bears all the uncertainties of what some seems to be an open ended revolution, with deep, essential, constitutional and regime transformation. There is no single actor in Egypt’s institutional, power sharing landscape. But it is impossible to say now what will Egypt look like in ten years from now.

33. This transformation, and the important tensions behind it, is being played around the two essential axis of the cultural life of a country: one is **cultural identity** in itself; the other is the distribution of roles between **the State and civil society**. Both are defining elements in any description of the cultural situation of a country, and both are in open transformation or, at least, in an open essential debate.

34. The debate around **Egypt's cultural national identity**, and the role Islam (or, better, a specific interpretation of the Koran) has on it, is seeping through every single cultural structure in the country. There has not been one interview to prepare this report in which the clash between a secular cultural approach and the potential impact on culture of a governmental policy led by Islamic principles has not been raised. For a majority of interviewees, this represents a risk not to be neglected, which may not only change priorities in cultural policy, but actually become a threat to several cultural expressions and to freedom of expression.

35. Any government actively promoting religious values in society would have a direct impact not only in the "expression" of culture (visual art not being allowed, performances not being authorized, ...), and in the priorities of what is funded or not, but also in the notion of creativity itself, that is, in the creation and production of cultural works.

36. In the personal exchanges during the mission it was not been possible to assess how much of this is based on a real threat from public authorities, based on facts, or how much is an undefined fear based on declarations of new elected politicians or previous attitudes. One high ranking interviewee, speaking from his official office, described the pressure against secular performances organized by party cells and groups, with full and passive knowledge of Members of Government, as if allowing or even pushing others to do that job. Some interviewees, including public officials, spoke of a real "anti-culture" policy which could be implemented soon, with a particular impact in areas such as theatre and performing arts, as well as in visual arts. Others dismissed that risk, not because of lack of will on their promoters, but because of lack of real capacity to implement it, and due to confidence in the strength of a secular or at least open and multicultural Egypt. There is no real evidence to confirm either position. Some interviewees have described incidents including the arrest of performers for hours or days. Coalitions of artists, curators and academics have been created in defense of freedom of expression of creativity²⁶; and a group of writers and academics has been created under the auspices of the Muslim Brotherhood, with the purpose of contributing to Islamize official cultural institutions. The group called "Hawiya", (Identity), targets in particular the **Supreme Council for Culture (SCC)**.²⁷ This respected body is supposed to play an essential role in fixing the objectives and priorities of cultural policy in the country. It is formally dependant of the Ministry of Culture, but composed by elected members. Its deep internal crisis, as it receives ever stronger pressure to push for a new cap in Egypt's cultural policy, turns it into one of the clearest scenarios of this struggle of unclear outcome.

²⁶ An overview in www.theartnewspaper.com/articles/Egypt/28487

²⁷ *Hawiyya* is the name given to a newly-formed group of writers and academics with Islamist leanings, which aims to "establish Islamic values in literature and place authors with religious inclinations on the map of cultural institutions and in the membership of their committees." (see the article "Muslim Brotherhood Has Eyes on Egypt's Culture", March 16 2012, at <http://english.al-akhbar.com/content/muslim-brotherhood-has-eyes-egypt%E2%80%99s-culture>

37. Secular or not, the issue of **the role of the State** and the free space left to society is a different one. Indeed, the political changes which started in January 2011 are essentially related to a fight for the role of citizens, democracy, and accountability. And when one approaches the reality of the Egyptian Government in managing culture, the first evidence is the **extremely high centralization of power** (as the joke goes, this has been a topic in Egypt for the last 5000 years). And indeed, this political and administrative centralization is directly related to a grave social unbalance between what happens in Cairo (eventually, the Great Cairo, which would include a few more Governorates) and the rest of the country.

38. But even more than that, what really strikes the analyst is the impressive role the State assumes in the cultural world. This giant State, assuming the leadership and the total initiative in cultural management that somehow tolerates civil society, can play a role, but at its own expense. It is not just an issue of management, but a much deeper, conceptual issue, which will only be changed with a constitutional transformation.

39. All distances considered, and at least as far as cultural policy and cultural management is concerned, the Egyptian State can be better understood using as a point of reference what used to be the approach to public management of culture in **Eastern European countries before the fall of the Berlin wall**. This comparison of course does not refer to what is or is not allowed in terms of personal freedom. It refers to the reality of the patronage by the state of the largest part of cultural activities. A State which since the 50's²⁸ has assumed that almost every single activity related to cultural creation, production, dissemination and training falls under its direct mandate. And not in terms of support to what society does in that field, but assuming it directly, as it assumes and manages the Foreign Service or the public infrastructures. This state-centered approach to culture, and its interesting analogies with old practices in, say, Poland, Czechoslovakia or Rumania, has a long history running parallel to Egypt's political changes in the 20th century,, and reached its apogee under the rule of Gamal Abder-Nasser, when even press, cinema and most publishing houses were nationalized.

40. The issue is not just about public presence or public control of cultural organizations. Other countries, also in Western Europe, have public orchestras, public museums, or even publicly owned dance or theatre companies. Several countries in Europe, for example, have orchestras or choirs which are directly linked to their public broadcasting organizations. Sometimes those musicians are public employees very much in the same way, legally speaking, as those working in the national railway system²⁹. But even when this happens, this "public" ownership and/or public control of cultural structures corresponds to **different levels of government** (national, regional, local), and is often managed under different formulas

²⁸ Egypt's Ministry of Culture was created in 1958 as an evolution of the Ministry of National Guidance.

²⁹ Such as the components of the Orquesta Nacional de España, to mention just an example within the EU. According to article 11 of Royal Decree 1245/2002, its musicians are to be hired in application of the general principles of State contractual employees.

which preserve **some autonomy or even independence** of those cultural institutions and their co-existence with others privately owned.

41. This is not the case in Egypt. It is probably the only country in the world, except those under the political system which collapsed in Europe in 1989, in which the State, the **central Government as such**, directly manages the largest part of cultural players and structures in the country: musicians, dancers, theatre players and other artists; cultural centres managers; cultural training institutions and its staff.

42. Of course, some sort of private cultural sector exists as well. It is stronger in some areas, such as the audiovisual sector, including film, commercial music and TV production), and extremely weak in others, and we will come to that³⁰. And there is not, and there has never been a State monopoly on creativity or on intellectual thought. But this reality, **the disproportionate unbalance between public and private** is a fact to bear in mind not only when trying to identify who are the public interlocutors and what would be the options, if any, for public-private partnerships; it is also a reality to bear in mind when trying to understand the role and the capacities of those who are not part of the State and have no interest in being part of or in working with it.

43. The mandate originating this report requested to look into the actual and potential cultural reality outside Cairo and its centralized structures. A good understanding of the described State reality helps to explain how **difficult it is for culture to play a stronger role outside the capital**, if the authorities do not promote it, and the independent sector is not supported to do it.

44. Egypt is divided into **27 governorates**, each one administered by a Governor appointed by the President. The central ministries, such as Culture, have directorates in each one of them; and although the Governor is the administrative head, those line or area directors keep their direct relationship with the Ministry who appointed them. Hence, the Governors' intervention in the cultural field is rather limited, it very much depends on the personal initiative, and –within the current structure- any landscape changing initiative would only succeed if supported by the Ministry of Culture. The two additional levels of local administration, at a district level, and the local administrative units, have little autonomy and are due to implement instructions from the next level, from which they receive the resources. So, even if local authorities were convinced of the opportunity of a cultural initiative, there's not much they can do on their own to support it.

45. It is to be noted that this **sub-national level** has very little resources. It has not been possible to obtain spending figures with a territorial distribution (if they exist at all). But what we can say is that, globally, in Egypt only 15.8 % of its national recurrent resources are

³⁰ In Egypt the word for “private” is “independent”, just to confirm with the language that “publicly funded” and “independent” are incompatible concepts.

provided to the local administration level. In other words, only one out of seven Egyptian pounds are budgeted for the provision of services at a local level. Six out of seven pounds are spent on central government administration. Resources among Governorates are allocated on the basis of population³¹.

46. The Ministry is divided in **Sectors** of books, fine arts, etc..., all of them coordinated by a person working closely with the Minister himself. In the interviews, even high ranking officials acknowledge the actual hypertrophy of the Ministry, while recognizing that it will be very difficult to cure. An 80% of the total budget of the Ministry is spent in current expenses. And the largest part of these is the salaries of its thousand employees, many of them without any particular expertise or training in this field. The Ministry's main instrument of presence and cultural activity throughout the Egyptian territory, in and outside the capital, are the five hundred and sixty Cultural Palaces, also referred to as Cultural Houses. Their role and limitations are described later in this report. Their managers, civil servants with or without any experience in the area, are appointed directly by the Ministry. A **Cultural Development Fund** is the Ministry's financial instrument to support artistic activities and infrastructures³². As far as the management of this Fund is concerned, two points can be mentioned: there are no clear rules or procedures regarding access to subsidies; and there as general perception, including among public officials, that the granting/receiving of public money implies some public authority on the content of the cultural activity.

47. There is, however, a strange **paradox** in this strong, centralized, quasi monopolistic approach to culture. Through the different interviews, perhaps the most repeated criticism against the Government management in the field of culture has not been on decisions taken or resources allocated. The biggest criticism is, in fact, the very **absence of a cultural policy**, a coherent line of action, a mandate received from above to be implemented by officials throughout the country, mainly, but not only, by those in charge of the hundreds of cultural palaces. So, in practical terms, the actual orientations and decisions in cultural policy depend, beyond reason, on the personal character, motivation and initiatives (or on the total passivity, ignorance and laziness) of those who are supposed to implement them.

II.1.2 Public players of un-political nature

48. The distinction between public sector and private sector is a common one, and can be based on many elements such as the obvious funding, but also legal rules applicable to staff and management. It is in the latter, with management in the largest sense of this word, where the situation in both countries under analysis differs most from European standards. In the

³¹ J. Boex, "Democratization in Egypt: the potential role of decentralization", Policy brief, Urban Institute Center on International Development and Governance, February 2011.

³² It is difficult to describe it in present or in past terms. The Cultural Development Fund budget was cut in 2011 by 83%. (<http://english.ahram.org.eg/NewsContent/5/35/11796/Arts--Culture/Stage--Street/The-budget-of-the-Ministry-of-Culture-to-be-reduce.aspx>)

world of cultural management, there is a distinction in Europe between “public” and “governmental” (in particular in terms of “politically controlled”). There can be public organizations and structures with an important degree of autonomy or even independence from Government and from the political sphere, in the use of their resources and in the operational decisions. De-centralization, the existence of different levels of power, contributes to this autonomous management. Unfortunately, both Morocco and Egypt have a long way to go before any institution can be at the same time “public” in terms of the resources it uses and the staff it employs, and perceived as **“owned” by society, and not “owned” by the Government**; and alternately accountable, subject to some objective criteria and rules of management, with managers appointed on merits, and free from simple cronyism.

49. This is the situation of most, if not all, public educational and cultural institutions in both countries. Public theatres, public festivals, cultural or youth centres, academic institutions, and other similar bodies have an appearance of autonomy, but have an **extremely high level of dependence of the Ministries** responsible for them. The consequences are negative in many fields: first, it is difficult for such organizations to have independent initiatives, and therefore to be promoters of new projects. The potential for courageous programmers to adapt the content of what they do to new tendencies or just to the reality around them is limited. This is a difficulty based on the mentality which derives from this structural situation, but also from a very limited budgetary decision making capacity. Second, this reality has a direct impact on the social perception of the public sector on society. The so called “independent” sector sees itself as freed from “Government”, which includes everything else, even public theatres, public orchestras and theatre companies (especially in Egypt), or public education. As a result, most interviewees rejected the very idea of public-private partnerships, or real collaboration. Or, in the best case scenario, they reacted with deep skepticism to it.

50. Still, there are public institutions which, even if linked to and dependant on the government, have a **basic autonomy in their essential role in the field of culture**, and which, at least theoretically, can be the basis of some sort of public-private collaboration³³.

³³ In an effort to identify possible partners in a project, and potentialities for public private partnerships, it is worth to recall the role of some professional organizations related to the creative economy with some sort of hybrid nature, which could potentially take part in projects in the area of training, workshops, etc.... By dual I refer here to the fact that these are not really governmental structures but, at least in the current state of things, nobody would see them as simple components of the private or civil society scene. That is the case, for example, of the **Ordre des Architectes du Maroc** (and of each of the 8 Regional Councils, who have their own budget and legal personality; the one in Casablanca represents a third of the country’s total professionals). Or, in different terms, the case of Egypt’s important sector **syndicates**. There are several who are directly linked (although sometimes only in part of their membership) to cultural professions, and even if they are centrally based in Cairo, they represent professional from the whole country: the Film Association, established in 1955; the Syndicate of Actors, established in 1955; the Syndicate of Musicians, established in 1955; the Syndicate of Artistic applied professions, established in 1976; the Syndicate of Applied Arts Designers, established in 1976; and the Syndicate of Artists, established in 1976. They are all considered as too official, too close to government. As a part of the post revolutionary mood, there are movements to create new syndicates in some of these disciplines, starting with actors. Whatever happens to these

Education and training

51. The first public institutions playing an important role in the what we can generally describe as the creative sector and the Culture and Creative Industries (CCIs), which may be eventually play a role as partners in cultural projects, are all those involved in **education and training**.

52. In **Morocco**, public education in the arts, and in other disciplines which can have an impact in preparing CCIs professionals is mostly developed around “Instituts”. These are high level schools, always dependant of (“sous la tutelle de”) one or another Ministry. In some cases they have one or even more private counterparts³⁴. The opinion from the interviewees on these institutions is not negative as a whole in terms of their seriousness and the qualification of those teaching in them. However, there is some criticism on the rigidity of their programs. The word “old” is probably the one most repeated terms when describing teaching methods and content. There is almost no public educational offer on what could be called “new jobs” on creative industries: from multimedia to advertising or design. When it exists, it is implemented by private schools.

53. In **Egypt**, several Public Universities have an Arts and Fine Arts Faculty³⁵. There is a large proportion of women among students (two thirds in the case of Helwan Arts Faculty).

initiatives, it appears certain that the internal structure of these institutions and their interaction with their members will be affected sooner or later by the whole new political landscape.

³⁴ The following can be cited:

Institut Supérieur de l'information et de la Communication (ISIC), in Rabat, under the control of the Ministry of Communications. Mostly about journalism, but with an impact on advertising. **Institut National des Beaux Arts (INBA)**: Founded in 1945 as National School, transformed in National Institute in 1994. (Ministry of Culture).). In 2012 the first Fullbright Fellowship to be granted ever in Morocco in a non scientific discipline was granted to a female student of this School specialized in cartoon design (bande dessinée).

Institut Supérieur d'Art Dramatique et d'Animation Culturelle (ISADAC) in Rabat. It is under the authority of the Ministry of Culture. **Institut National des Sciences de l'Archéologie et du Patrimoine (INSAP)** (under the Ministry of Culture). **Ecole Nationale d'Architecture**, in Rabat (Ministry of High Education). **Institut Supérieur des Métiers de l'Audiovisuel et du Cinéma (ISMAC)**, in Rabat, under the auspices of the Ministry of Communications. **École Supérieure de l'Information (ESI)**, dependant of the High Commissioner for the Developpement Plan (Haut Commissaire du Plan) : this institution prepares experts in archives and libraries management and in information management. Finally, a list of Music High Schools (Conservatoires) can be found at http://www.minculture.gov.ma/fr/index.php?option=com_content&view=article&id=200%3Aconservatoires-de-musique-relevant-du-ministere-de-la-culture&catid=43&Itemid=130&lang=fr

³⁵ The **Fine Arts Faculty of Helwan** was long time ago an “independent” (private) School; it is now a part of Helwan University, with no autonomy at all. Its figures may give an idea of the demand in different disciplines: 135 students in interior design, 15 in sculpture, 265 in architecture, 110 in

As it corresponds to the highly centralized and State centered approach, an essential element on higher education in the arts is a large complex collectively identified as the **Academy of Arts of Egypt**³⁶. The Academy is based in Cairo, and it is acknowledged by its own managers that, even if in theory it is open to students from all over Egypt, it may be actually very expensive for a student from upper Egypt to receive musical formation at the Conservatoire, for example. In some disciplines, such as Arab Music (to be read “classical Arab music”), it may receive students from abroad, as it the most important center of its kind in the Arab world.

54. Behind these institutions, of course, there are some brilliant, experienced and well intended arts professors, linked to their disciplines and committed to cultural education in the most passionate way. It would not be fair to criticize them generically. But the academic structures they operate in, in particular in Egypt, are considered by many as **out of touch with the contemporary reality** in which their students and potential students work and live. A small research through their rather poor web sites (often just an url address, or outdated, almost never interactive...), is an interesting element for consideration. Their rigidity is also reflected in the closed categorization of disciplines. Particularly important from the perspective of this report, and according to many opinions received, these are largely “arts” schools with a mentality where concepts such as trade, commerce, cultural industry, funding, production, cultural management, audience building, are absolutely foreign.

painting, and 110 in graphic design. Another public institution worth mentioning outside Cairo is Minia University. It has both an Arts and a Fine Arts Faculty. The latter includes a graphics and an animated cartoon department, both with potentially interesting in areas such as videogames and computer graphics.

³⁶ The **Academy of Arts** is divided in disciplines, each discipline having its own training institution: The Cairo Conservatoire; the Higher Institute of Artistic Criticism, Higher Institute of Arabic Music, which includes two performing groups; the Higher Institute of Cinema; the Higher Institute of Dramatic Arts, comprising programs in acting, dramatic arts, décor, criticism, make-up,...; the Higher Institute of Ballet; and the High Institute of Folk Arts. As part of the Academy there are some public performing groups, such as Academic Troupes for Folk Music; the Academy of Arts Symphonic Orchestra; the Children & Youth Chorale; the Academic Troupe for Ballet; the Academic Troupe for Theatre; the Umm Kulthum Band for Arab Music and the Religious Recitation Band.

Libraries

55. In some countries, national libraries play a significant role beyond their own walls and archives. La **Bibliothèque Nationale du Royaume du Maroc (BNRM)** based in Rabat is the second biggest library in the country³⁷. It manages the **Legal Deposit of books**, and its large facilities play a significant role as a place for social and political events in the capital. On acknowledgment of one of its managers, only 40% of its registered 20.000 users have actually consulted a book from the library. It is therefore basically a large space for students and for public events. Its cultural impact beyond that is basically restricted to what they are doing in the field of digitization of ancient manuscripts. Plans for digitization of more modern works, or for any form of e-library, are not on the agenda for now.

56. The **Egyptian National Library and Archive** is the largest library and cultural archive in the country, and is very much respected due to its centennial history and the importance of its archives. As such, it is a big player in the field of digitizing ancient content to make it available on line³⁸. It works closely with **CULTNAT**, the **Center for Documentation of Cultural and Natural Heritage**, one of the impressive initiatives of its better known and better funded “sister” in Alexandria, the **Bibliotheca Alexandrina**.

57. As it is well known, this library, also called **New Library of Alexandria**, was an initiative of Egypt’s previous President. It was and remains, in the most literal sense of this word, and extraordinary initiative. It is not just a library, but a huge cultural complex³⁹. It is also host to a number of institutions, such as the **Anna Lindh Foundation**. It is easy to be surprised by the figures behind this institution, and equally difficult to make an assessment of its impact. If considered at a world level, or perhaps under some sort of Mediterranean scale, it is undeniable that it is making an important contribution to the world’s online content in Arabic. The Library is at the forefront of several major international initiatives including the World Digital Library (of which it bears the Chair) and the Encyclopedia of Life (EOL) where it is

³⁷ Morocco’s biggest library is the beautiful and modern **Fondation du Roi Abdul Aziz**, also based in Rabat, with an yearly budget of 3 million dollars provided by several donors and, above all, by Saudi Arabia funds.

³⁸ In collaboration with **CULTNAT**, they have successfully initiated and completed the digitization of two archival collections of approximately 10,000 maps and 3,500 papyri.

³⁹ Within its premises one can find: a Library; an Internet Archive; Six specialized libraries (for Arts, multimedia and audio-visual materials, the visually impaired, children, the young, microforms, and rare books and special collections); Four Museums (Antiquities, Manuscripts, Sadat and the History of Science); A Planetarium; An Exploratorium for children’s exposure to science (ALEXploratorium); Culturama (a cultural panorama over nine screens, a multi-media presentation of Egypt’s heritage across 5000 years); VISTA(The Virtual Immersive Science and Technology Applications system, an interactive environment allowing researchers to transform two-dimensional data sets into 3-D simulations); Eight academic research centers (Alexandria and Mediterranean Research Center, Arts Center, Calligraphy Center, Center for Special Studies and Programs, International School of Information Studies (ISIS), Manuscript Center, Center for the Documentation of Cultural and Natural Heritage (CultNat), and Alexandria Center for Hellenistic Studies.); Fifteen permanent exhibitions; Four art galleries for temporary exhibitions; and a Conference Center.

represented on the Executive Committee. The mere reading of the list of names serving on its Executive and Advisory Boards reflect the impressive international dimension of this initiative.

58. But if the Library is to be analyzed within the **parameters of Egypt's cultural life and cultural reality**, the analysis becomes slightly more complicated. For example, according to data in the public domain, the literacy rate in the country is 71.4% of the total population (male: 83%; female: 59%). And a new campaign called the 'Sona'a el-Haya' (Life Makers) campaign has launched an initiative called 'Education is Power', with a budget of 22 million EGP⁴⁰, to eliminate illiteracy in five years⁴¹. This is in solid contrast with the fact that the Bibliotheca Alexandrina received in 2011 a total amount of more than 128 million EGP⁴² in subsidies from the Ministry of Finance (of which 113 million correspond to the salaries and wages of its 2.000 employees). The same could be said if the comparison is made with the budget of the Ministry of Culture as a whole. The impact outside the city of Alexandria of the Library's activities (including its museums, art galleries and everything else) is really minimal. In fact, even in the city itself such an impact is not big, in terms of individuals benefiting from and taking part in their activities, as reflected by the data on the Annual Report.

59. So, as far as the **budget** of the New Library of Alexandria is concerned, it appears a fair consideration to say that it will be difficult to preserve this state of things for the new Egyptian rulers, and for a Government with some sort of democratic control and accountability of its budget. And if the Bibliotheca Alexandrina is to play such a role for the international community on the back of the Egyptian people, other foreign partners will need to come in.

60. In coherence with its approach to culture, the Egyptian Government, through the **General Egyptian Book Organization**, is the owner of a network of bookshops distributed around the country. There are 20 such bookstores in Cairo, 2 in Alexandria, and 1 in the main city of each Governorate. These bookshops sell mainly books published by the State, at a subsidized and fixed price (printed in the cover). These publications may include children books or literature, and of course studies, research and other. These public bookshops are also a point of sale of foreign publications, mainly research or scientific books and magazines.

Public cultural venues

61. If there is a complaint which has been repeated almost in each and every interview preceding this report, that one could be the absence of proper spaces, facilities, in which cultural activities can be developed. Both in Egypt and in Morocco, all interviewed cultural players complained that there are not **enough available locations** to rehearse, to organize activities with young people, to meet, to perform. But the paradox is that those spaces exist

⁴⁰ 2.393.000 €

⁴¹

<http://213.158.162.45/~egyptian/index.php?action=news&id=20998&title=%E2%80%98No%20renaissance%20without%20education%E2%80%99>

⁴² 13.921.000 €

and they are public, but they are ill managed, and not made available to civil society as they could and should be.

Egypt

62. An essential part of Egypt's cultural landscape are the **Cultural Palaces**, and their smaller versions, **Cultural Houses**. There are 544 Cultural Palaces (and Houses) around the country, employing 8.569 staff (see detailed figures in the Annex). Each one of them has a Director, appointed by the Ministry of Culture, who runs the whole scheme through the General Organization of Culture Palaces (GOCP). Every manager, often civil servants with no previous relationship with culture, has authority on the use of the premises and programming, in consultation with the Palace's advisory committee. Each Palace has one of those advisory committees, composed by intellectuals and artists, who are supposed to decide on what is done or performed there.

The story and role of Egypt's Cultural Palaces is intrinsically linked to the previously described political philosophy, strongly developed by **Gamal Abder Nasser**, which adopted Eastern Europe socialism as model⁴³. But *whereas in the 1950s and 1960s the focus was on raising the cultural level of workers and peasants in the interest of social equality and development (al-'adala/ al-tanmiya al-ijtima'iyya in the Mubarak period many culture workers argue(d) that cultural levels must be raised in order to fight religious ignorance and extremism. What (was) at stake for them was their power to determine the future of the Egyptian nation.*

The view that more culture is needed to fight wayward religion is so dominant among state officials and among intellectuals generally that it is rare to find a critique of the state's culture project outside of its terms. (...) Even many critics of the government believe it is the state's job to provide the infrastructure with cultural enlightenment (...). Criticisms of the culture palaces usually stress that they are underfunded, mismanaged, or corrupt, not that they should be abandoned. Outside critics and culture palace employees both argue that the culture palaces fail in their mission because of the "lack of culture" or religious extremism of some employees, and of the general population.

63. Cultural Palaces are not to be understood as "public places" or cultural halls at the disposition of civil society, although NGO's and private artists may eventually authorize to use them, on certain restrictive conditions. Cultural Palace's are, or rather, *were intended to be*, expressions of a certain concept of culture decided by the authorities, and implemented through the Government's own means: actors, musicians, dancers⁴⁴ or poetry readers on the

⁴³ See: Winegar, Jessica; "Culture is the Solution: The Civilizing Mission of Egypt's Culture Palaces", Review of Middle East Studies, Volume 43, Numéro 2, 2009-01-01, Pages 189-197. This author's description of the current reality of Cultural Palaces and its perception is confirmed by the interviews preceding this report. I therefore quote extensively her well documented text here, of course without backing its judgments.

⁴⁴ The most important national public troupe is the "**Reda Troupe**". This is an old institution, founded in 1959. Its members are dancers with a government contract, well known around the country. Historically, the repertoire of the Troupe included more than one hundred and fifty dances that ranged

State payroll⁴⁵ and at the service of a State manufactured cultural message. The number of employees per Palace (15 is the national average, see the Annex) are also an obstacle this system will have to change.

64. **Cultural Palaces' programming** was intended as a key weapon against religious ignorance and extremism. And, as such, they used to deliver their own, secularist version of Islam⁴⁶. If this description is accurate, it is easy to understand that the Palaces are now the perfect symbol of the crossroad's Egypt's cultural life finds itself in. A model is dying, but there is no model to replace it. In the current post revolution environment, two opposite forces and visions may be on the same side to defend a secular Egypt: those who may be called the heirs of Nassers and afterwards Mubarak's approach (culture as a State promoted protection against fanaticism and a radical approach to religion and Islam); and those who defend culture and creativity as an expression of freedom, as a space of independence, as just one more result of modernization, openness and democracy. But those in this unstructured "alliance" against a new Egypt where culture expression would be controlled by religion find themselves in total disagreement on the role of Cultural Palaces as well as on the quality of what is done inside their walls. And on how they should interact with civil society and new culture creations. According to many interviews, the reality and daily life of Cultural Palaces completely depends on the personality of their directors or managers. A few of them may have some initiative, and may sometimes open the doors to activities which are not 100% controlled by the public officials, and not performed by the publicly appointed musicians or actors. But that is still an exception. However, the truth is also that often there is almost no alternative location for an amateur group to perform, for a band to play, for an artist to show his/her work⁴⁷.

from duets to three act dance dramas with more than thirty dancers on stage at one time. In its glorious times the Reda Troupe gained renown in Egypt and visited more than fifty countries. Strongly criticized today as its quality has faded, it is probably one of the clearest examples of a model with no future, and the risks of the Government acting almost directly as a producer.

⁴⁵ Not that these payments are huge, though: A theatre troupe directly under the Ministry of Culture has an annual budget of 5000 EGP (560€, the troupe of the Culture Palaces have an annual budget of 2500 EGP (280 €), and in the culture houses an annual budget of 1500 EGP (190 €) or less.

⁴⁶ Winegar, Jessica; "Culture is the Solution...": *At Ramadan music and dance performances, everyone sits in chairs and watches, just as they do at literary readings or plays. Audiences are meant to show appreciation by seated applause, typically at what is judged the "end" of a segment of performance. Ramadan performances often feature music and dance categorized as "folklore," a category framed as national more than religious. Sometimes culture palaces feature programs of Sufi lyrical recitation (inshad), but again audience members sit in chairs and are expected to applaud, rather than sway their bodies in Sufi dhikr.*

⁴⁷ An interesting source of information here is an unpublished report prepared by Astrid Thews for the Cairo based organization "**Mahatat for Contemporary Art**" and funded by Dutch donors. As a preparation for a specific project, they examined in detail, through a series of visits at the end of 2012, the situation of culture in the Governorate and the city of Damietta. The report mixes interviews to local artists, formerly and currently active, with anecdotal description of the relationship between cultural creators and performers and the Cultural Palace or the Public Library. A vivid quote among others: "Not everybody has easy access to these public facilities or can influence or successfully suggest activities there due to patronage. XXX, as an example has personal relations to some of the

65. Could it be possible to imagine these venues or most of them turned into publicly supported places radiating culture and creativity at the benefit of the societies around them, and in reasonable collaboration with private initiatives? It is actually difficult to imagine. But if such a scenario is ever to exist, one of the important things to do would be to train professionals to manage those places.

Morocco

66. There is nothing similar to the Cultural Palaces in Morocco. There are around 25 “**Maisons de la Culture**” around the country. But this common denomination is misleading if it is understood as a common standardized category of cultural centers under the control of an administrative authority, however this is not the case. The Maisons de la culture, together with the libraries and mediatheques, are in some cases linked to (and have been built by) the ministry of culture, and in others they belong to other authorities or to the local administration. So in a way the name refers to a network of spaces which can be used for cultural activities; some of them have better developed premises, other have poorer infrastructure.

67. In this context, an institution such as the Youth Houses, les **Maisons de Jeunes**, could play a much larger and important role in supporting a stronger cultural fabric through the country.

68. There is a total of 479 Youth Houses in Morocco, depending on the Ministry of Youth and Sports. 40% of them are in rural areas; this represents an average of one Youth House for 20.888 people of 15 to 35 years. The allocated budget from the Ministry, which is often complemented locally, is of around 3000 MAD⁴⁸.

According to their internal regulations, Youth Houses are run by an elected council, composed of the director of the House and representatives of youth organizations. The oversight comes from the directors, who are public officials trained at the Institut Royal de Formation de Cadres under the responsibility of the Ministry of Youth and Sports. They are supposed to have a specialized training in the field of socio-cultural animation.

Library staff which is why he can use the premises free of charge. As another example, YYY can use the roof of the Library for dance rehearsals as his wife is a Library employee”.

⁴⁸ 270 €

69. The **World Bank** has dedicated a recent report ⁴⁹ to the actual and potential role of these youth houses in Morocco, in the context of problems related to youth in the country⁵⁰. As the World Bank describes, “the Houses’ staff tends to come from a higher age cohort, with few new recruits youth. In some of them, this seemed associated with low motivation, poor communication between staff and young beneficiaries and low attendance. Over the next three years (from 2012), 1,800 employees aged 54 and 55 years - a total of 2,800 - retire. This is an opportunity to recruit young people whose experience and skills are best suited to work with young people.”

70. The Bank’s approach is one of employment and social integration. But its analysts assume that one very strong contribution to those young people would be to integrate them in what the Bank describes as “social and civic life”.

71. According to the Bank report, “Young people are concerned about the consequences of their exclusion from the social and civic life.(end quote?) Factors such as school dropout, unemployment, underemployment and lack of support structures that facilitate social participation contribute to idleness, isolation and frustration, exposing young people to behavior risk such as indulging on drugs or crime. They suggest that associations and youth centers should offer opportunities to acquire the skills and personal skills to find a job but also to participate, express themselves, show their skills and get useful training”.

72. This approach confirms the importance of these institutions, which goes far beyond their potential as a place for “entertainment”. This is a perfect example of the role of culture and cultural activities, as proposed and developed by NGOs and different sort of associations, as tools for social development, including an indirect impact on the preparation of individuals for the job market.

73. In the words of the World Bank, “youth centers are public spaces designed to accommodate various learning activities whose content must be improved. More specifically, the centers could offer programs and activities around the following three themes: (i) non-technical skills (soft skills) and social skills, (ii) the active participation of young people, and (iii) the ability to employment skills. (...) Soft skills and life skills (...) include basic skills such as literacy, numeracy and communication skills, behavioral skills and construction of identity, such as leadership , teamwork and skills; skills of conflict resolution, as well as opportunities that foster creativity and cultural and sporting initiatives”⁵¹.

⁴⁹ «Promouvoir les Opportunités et la Participation des Jeunes», Banque Mondiale, Région Moyen-Orient Afrique du Nord; Département du Développement Durable, Mai 2012.

⁵⁰ According to the World Bank, the young population in Morocco (15 to 29 years old) represents 10% of the total youth of the MENA region. It represents a 44% of the fit-to-work population in the country (15-64 year old).

⁵¹ «Promouvoir les Opportunités... », p. 124. Our translation.

74. Such a change of perspective would require not only thoughtful mentality and management changes on the part of the public officials involved, but also the support to those associations and organizations who can play this role.

75. The Ministry of Youth is investing in some Houses, and renovating its cultural equipment and facilities, sometimes with the support of social development funds (such as the INDH, “Initiative Nationale pour le Développement Humain”). And such an effort, if combined with the presence of an efficient and motivated Director to manage the House, could have a very positive impact⁵².

76. However, the interviews and exchanges preceding this report are less optimistic or positive, although with some contradictory statements referred to different Houses in different places. The context for these considerations is always the same: lack of venues to be used for cultural purposes. The general complaint from those that could be developing cultural activities with particular impact on youth stems from the fact that they do not have venue opportunities available to them. This has worsened after the closure and demolition of cinema theaters which were also used for a range of purposes like music rehearsals or concerts. Similarly, Youth Houses and their auditoriums or small theaters, remain closed to them, even when they are unused⁵³.

77. There are already several working channels and structures of cooperation among the Youth Houses with civil society and NGO’s (in the field of training, in the organization of workshops...). So in this case it is not difficult to imagine, perhaps with very little changes and some decisions adopted at a national level, a real improvement in the openness of these institutions, with their current and future director’s participating in projects of different sorts⁵⁴

⁵² Le Matin, Interview with the Al Quod’s Youth House Director (28/08/2012): « Vu le rôle que jouent ces établissements dans l’encadrement des jeunes, permettant, ainsi, de contribuer efficacement à la dynamique culturelle, sportive et artistique, le ministère de la Jeunesse et des sports a tenu, par le biais de ses services centraux et de ses délégations provinciales, à mettre en place des opérations de mise à niveau, de réaménagement et d’entretien des maisons des jeunes au Maroc. Par ailleurs, de nouvelles maisons des jeunes ont vu le jour. Pour ce qui est de la maison des jeunes Al Qods, elle a connu dernièrement une série d’importantes opérations de réhabilitation et de réaménagement. Ces opérations ont ainsi permis la création d’une salle d’enregistrements musicaux et sonores, d’une salle de musique et de multimédia ainsi que d’une salle multidisciplinaire. Par ailleurs, la salle de spectacles a bénéficié de plusieurs opérations de réhabilitation, qui concernent notamment la scène et les sièges, et la création d’une cabine technique pour les lumières et les effets sonores. En parallèle avec ces travaux de réhabilitation, la délégation du ministère de la Jeunesse et des sports à Fès, en collaboration avec les services centraux du ministère, s’est assignée comme mission la réhabilitation et la création de nouvelles maisons de jeunes dans le cadre de l’INDH ».

⁵³ The leaders of two different music groups in different cities and with different musical approach made identical comments in their interviews: Othman Benhami, of the Hip-Hop group H- Kayne in Meknés; and Reda Allali, of Hoba Hoba Spirit in Casablanca.

⁵⁴ Some initiatives which have been already proven successful would have a larger social and cultural impact and better stability just with the possibility of access to a stable structure. Such is the perception, for example, of the promoters of the Association “Urban Style”, the popular Hip-Hop band **H-Kayne**. They organize workshops in Meknés, under the name of “**Hip-Hop Madrassa**”, which have a

II.1.3 Foreign Public Players

78. Just for the sake of classification, it is worth mentioning the role of foreign public organizations in the cultural landscape of the countries analyzed.

79. A simple review of any flyer or poster announcing the smallest cultural activity in Egypt and Morocco will testify of the essential, indispensable role played by **foreign embassies and foreign cultural national institutes** in the support of cultural events and projects. In structural terms, this adopts to different forms, and an in depth analysis of it exceeds by far the remit of this report. But it is worth saying that sometimes one activity appears supported by the Embassy of one country and by its cultural Institute, with both logos presented separately. This suggests the existence of two different “cultural” budgets, with two different managers and decision making procedures, related to one single country. Different countries have different public management models in this area, which may have an impact in the decisions taken. France, for example, concentrates its cultural support through the structures of the Institut Français (an organization of huge cultural influence in Morocco). Others, such as Spain, make a difference between the Language Institute (Cervantes), which is involved in and supports cultural activities as well, and the Embassy’s Cultural Attaché, with direct links to Spain’s foreign development agency.

80. There is some degree of **coordination** among foreign agencies and cultural centers, with a role on being played by the EU Delegation in the country. But this coordination is mostly limited to information exchange: interviews to both sides, donors and recipients. However, this does not provide any element which demonstrates regular coordination at the level of decision making, common prioritization or any other joint effort when approaching their countries’ challenges of culture in the country.

81. This doesn’t mean that there cannot be common projects in some cases: the most recent example could be the joint support provided by the Institut Français and the Goethe Institut to setup a new cultural web radio, intended to start in May 2013⁵⁵.

larger demand than places to offer. Through 6 different workshops they train young motivated people in DJing, the use of computer-aided music, stage presence, writing techniques, break-dance, and graffiti. The activity, which is funded at 50% by the Ministry of Culture, takes place for a short period every year; they are convinced that, if offered the proper space, for example within a Youth House, they could be developing this courses (with a strong social benefit beyond culture) on a regular basis for the whole year.

⁵⁵ This project should lead to the creation of an important communication tool for the visibility of cultural activities and the support to the associations behind them. The new internet radio, promoted and to be managed by the cultural association **EAC L’Boulevard**, is receiving financial but also technical and training support from several other European cultural internet radios, and from a Germany’s Allianz Foundation. .

82. It can be said that, if we leave aside those directly promoted by the Ministry of Culture, and those with a clear business oriented or commercial nature, there is almost no cultural event, project or activity in those countries which could survive without the support of foreign public funding, channeled through foreign institutions in that country.

83. In Morocco, this situation has created such a high level of **dependence on foreign collaboration** that there are legitimate fears about the impact of Europe's financial situation, and subsequent cuts imposed on public agencies related to cultural development. Foreign public support is never 100%, and, for some events and activities, is sometimes not more than credibility through logos and name dropping, which ultimately reinforce the sponsorship options of a specific project.

84. As in other aspects of policy enforcement, the differences between the role played by one foreign country or another in the support to cultural activities in these countries are not only based on budget or general policy considerations. The personality (which includes their personal connections, their initiative capacities, and so on) of those foreign civil servants living in Rabat or Cairo and managing those big or small cultural budgets plays an essential role, and is sometimes an essential explanation of the differences of what one same country or agency has supported in different periods.

85. Indeed, the nature of projects supported in Morocco and in Egypt differs as much as their respective cultural landscape. Egypt has a large story of public – private partnership agreements related to cultural heritage (including manuscripts and, obviously, anything related to archaeology) and fine arts. In Morocco the heritage dimension also plays a role, but most foreign agencies and cultural centres are involved in other cultural activities. For those with a stronger presence in the country, mainly France and Spain, and to some extent, Germany, this role in Morocco's cultural world includes the availability of foreign owned facilities, such as theatres or other spaces. A particular mention can be made to the network of mediatheques promoted by the Institut Français, for example.

86. These foreign organizations are **urban almost by nature**. They have no or very little impact in rural areas. Indeed, while this applies to both countries analyzed, the situation is not identical. In Egypt there is practically no foreign presence nor activity outside Cairo and eventually Alexandria. In Morocco, France, who is the biggest foreign player by far, has 10 centres and 13 "mediathèques. Spain follows with 6 cultural centres while it has only two in Egypt and Germany with two centers in both countries.

87. It is interesting to verify that these foreign public centers have very **little relationship, if any, with local (or regional or national) public organizations** related to culture and cultural industries. According to some interviews, this would be very difficult in practical terms, although there is no theoretical or legal obstacle to common projects or activities. In Morocco, this situation, that is, public governments intervening in cultural activities directly or through

private organizations, and with almost no communication with the public authorities, is not evaluated in a positive way. The “obsession to bypass the public organizations”, as one of the interviewees put it, is “not helpful” in a long term perspective. This is being said with full acknowledgement of the essential role of those foreign institutes in supporting the country’s cultural activity. But this is a concern which is there and cannot be denied. And the more the country modernizes and evolves in the path of democratization, with its effects on accountability and internal reform, the more it will be necessary to develop those bridges between the public sector and the foreign public support.

88. The easiest framework for public national-public foreign cooperation could develop around the previously described network of public cultural training and academic organizations. There are already some examples in that direction. The Institut Français has some cooperation agreements with National Schools such as the ISADAC (performing arts) or the ISMAC (cinema and audiovisuals). The agreements offer training and technical support. But there hasn’t been much activity beyond the simple existence of those signed documents.

89. Perhaps the main criticism cultural players raise in regards to support from foreign organizations (quite common to public and private donors) was previously described described by a report in 2009⁵⁶. As it was written there, “the main concern of operators regards the priorities according to which subventions will be attributed. If the criteria for the attribution of public funding remain vague when it is not clearly dealing with individual specific interests, international donors and foundations usually adopt **project based funding** while cultural operators request long term and sustainable modalities of subventions. (...) Giving access to funding only through punctual calls for projects, they do not allow cultural operators in dire need of structuring their activities the possibility to have some horizon and plan in the mid and long term to elaborate challenging strategies and sustainable programs”.

90. Funding for multiannual projects, -which when it exists can be mainly linked to decisions from abroad, that is, from central development agencies and not from locally based institutions-, could certainly reduce this negative impact. Within the limits of their respective structures and legal frameworks, those directly involved in the field are trying to move away from the practice of supporting specific events and short term activities. Indeed, every activity supported or directly promoted which is related to training or to capacity building runs in this positive direction.

91. Turning Embassies and Cultural institutes into high quality cultural programmers, even if that is done in a collaborative way, is not the ideal model from a development perspective, and certainly not the way to promote the surge of long term, sustainable cultural initiatives,

⁵⁶ “Towards a Strategy of Culture in the Mediterranean Region. Needs and Opportunities assessment report in the field of cultural policy and dialogue in the Mediterranean Region”. Fanny Bouquerel and Basma El Hussein, p. 40

and even less, build a creative industry economy around it. Unfortunately, the limits to that approach risk are becoming evident as soon as cultural budgets are cut across Europe.

92. A final mention in this section can be made to the **UNESCO offices** in Rabat and Cairo.

It must be noted that the relatively new approach to culture from the angle of cultural industries has not been received and is not being implemented by UNESCO in a uniform way in its activities worldwide. A simple comparison among websites of the different UNESCO bureaus proves this⁵⁷. And both Rabat and Cairo Offices remain rather attached to a more “classical” conception, in which culture is essentially a good to be “protected”. The combination of this fact with the legal reality under which UNESCO is supposed to deal essentially with Governmental authorities (a requirement which can also be interpreted in very different ways) has the consequence that in both countries UNESCO’s activities and influence quite distant from civil society, the private sector, or the “non-state” cultural sector in whatever way it is defined⁵⁸. UNESCO’s relations are exclusively with the Government and with the different ministries. That being said, with this essential angle, and with the sources and methodology which derives from it (and with the unavoidable and intrinsic limitations of that approach), UNESCO has produced in Morocco some solid and very interesting studies on the cultural situation in the country, including several with a certain perspective of cultural industries and of culture as a development factor⁵⁹. In Cairo, the Organization’s office is

⁵⁷ To quote one example among many possible others: UNESCO in Bangkok has a full page dedicated to cultural industries in its website (<http://www.unescobkk.org/culture/creativity/asia-pacific-cultural-industries/>), presented in very clear terms: “UNESCO emphasizes greater public awareness of the value of all the industries concerned and the development of diversified local capacities.

Because the creative sector has the potential to contribute to socio-economic development and poverty alleviation, and is a vital source for the cultural identities of individuals and communities, UNESCO aims to firmly embed the cultural industries within regional and national social and economic goals, strategies and programmes in the Asia-Pacific region.” The website of the Rabat Bureau (http://www.rabat.unesco.org/rubrique.php3?id_rubrique=16) includes a discrete reference to “cultural industries and the craft industry”. And the one corresponding to Cairo has no mention to this perspective at all, and the closest it comes to it is under the terminology of “intangible cultural heritage”

⁵⁸ A simple visit to the Organization’s office in Rabat (located in a distant residential area, with double security checks behind big walls) illustrates in the most graphic way their approach and concept of their mission: it is not an institution open to dialogue and to work with civil society and with independent cultural players; it is not even a transmitter of information to them (non of the interviewees had ever had any contact with that office in the past).

⁵⁹ These studies have been the result of a global collaborative program of the Moroccan Government and the United Nations System (in particular, UNESCO, UNDP, UNIFEM, UNIDO and UNFAP), on the general topic of «Le Patrimoine Culturel et les Industries Créatives comme Vecteurs de Développement au Maroc - 2008-2012”. The resulting documents are quoted in the bibliography, and include titles as “Evaluation de l’intégration des priorités de sauvegarde et de valorisation du patrimoine culturel, du genre et du tourisme durable dans les Plans Communaux de Développement (PCD). Rapport Final». Or «Les écomusées au Maroc : Propositions pour un mode d’implantation et identification de sites potentiels ».

concentrated mostly in the areas of protection of tangible and intangible cultural heritage and in the subject of intercultural dialogue.

II.2 The private players

93. The role of civil society, (private sector, independent sector), in the cultural reality of the analyzed countries is in direct relation of their political situation, and directly linked with the space “freed” by the State and government, as already described.

94. Consequently, in Egypt the very existence and role of an **independent cultural sector** is an essential part of the current political debate. In March 2012 a group of 25 cultural innovators, university professors and experts in cultural administration, led by an initiative launched by the Mawred Cultural Foundation, established the **National Cultural Policy Group (NCPG)** for the purpose of formulating an Egyptian Cultural Policy. They produced an extensive policy document which they publicly delivered to the People’s Assembly. In this document⁶⁰, a call is made in favor of “decentralizing culture politically, administratively and geographically, and ending the hegemony of the capital and other major urban centres over cultural life”. Their call was in favor of “restructuring the Ministry of Culture and all the frameworks for the funding and administration of culture so as to enable civil society to play an effective role in cultural life and in order to increase transparency and prevent corruption”.

95. Later in the document, the authors expressly mention the need to “develop and institute plans and measures to enable the Ministry of Culture to assume a pivotal role in boosting strong national cultural industries as major contributors to the national economy. Toward this end, the Ministry of Culture must coordinate closely with the Ministries of Economy and Trade and Industry, and with the private sector. In addition, it must seek to foster a legislative and regulatory environment conducive to stimulating investment in these industries and enhancing their competitiveness”⁶¹.

It certainly sounds as a determined agenda. The document, in fact, is almost a de facto revolutionary manifesto, in calling for a dismantling of the current State cultural structures and putting those resources in the hands of civil society. Is that a plausible scenario? The group announced the preparation of a detailed list of legislative reforms, to be communicated to the newly elected Parliament. Only with time it will be possible to say how much of this deeply transforming program has been put in practice

⁶⁰ The full text of this document is enclosed in the documentary Annex to this Report.

⁶¹ Paragraph 5. See Annex.

II.2.1 Cultural and creative entrepreneurs

95. As anywhere else, **the non-governmental sector operating** in the cultural and creative field can be divided in two very different “species”: **commercial and not commercial**, that is, profit and non profit. But it must be noted that here this difference is not based on the legal structure, but as a discrepancy in mentality and the approach to cultural management, to funding, and in connection with audiences. In other words, strange as it may sound (in particular in Egypt), there are organizations acting as non-profits, but under the legal personality of a limited liability company, assuming to be commercial. The reasons for this are easy to explain: non profit organizations, associations, NGO's, are entities under the scrutiny of the State, and subject to its approval. Commercial companies are not. This is particularly evident in Egypt, where its old style socialist identity of sorts coexists with a relatively free and open economy. In this context, cultural organizations, even those with a high social commitment, often prefer to find refuge in a legal world conceived to promote entrepreneurship and investments, instead of using other associative instruments which would subject them to a regime of strong State control, often discretionary. But a simple look into their figures and their way to do business shows their authentic, non-profit nature.

There are not fully trustable figures regarding cultural entrepreneurship in Egypt and Morocco.

96. **In Egypt**, leaving aside the audiovisual industry, the strongest among creative industry commercial companies are the conglomerates related to the media world, TV and record production, and advertising. Some of those corporations are of Egyptian majority capital ownership⁶²; others, while they have a strong presence and influence in Egypt, they can be considered pan-arabic, in terms of audience and, sometimes, in terms of shares' ownership⁶³.

97. These companies are an important source of jobs for creative professionals (including scriptwriters, actors, technicians...). They often do the training of their professionals in-house. It could be foreseen that through one of these groups and with their direct technical and financial support some school or university could be created, really adapted to the market of the needs and the business reality behind these creative industries. This seems to have been a real project started by the Tarek Nour Group, which did not evolve for lack of funding.

Egypt's **old publishing sector** may come to mind in the first place here. But although it is true that there is a private sector of an important dimension and high export capacity

⁶² Such as Tarek Nour Communications (tareknour.com), or Good News Group (www.goodnewsgroup.com), which includes FM radio stations, film and music production, events management...

⁶³ The clearest example being the **Rotana Media Group** (<http://www.rotana.net/en/r/home>): a huge pan-Arab media conglomerate that includes a film production company, a magazine, television and radio (including several music channels with a huge impact in the commercial musical scene in the whole Mediterranean region), and the largest record label in the Arab world (Rotana Records).

(according to South Mediterranean standards or patterns), its big dependence from Government subsidies, and the huge reduction of these, have hit them very strongly⁶⁴.

98. So it could be said that there is almost no middle term between the small, modest (and, in real terms, non-profits) LLCs (Limited Liability Company) and big corporations with an impact mainly in music and the media. Among the few exceptions in this landscape, one could quote the important role of Cairo's **EI Sawy Cultural Wheel**. In the context of this report, not focused on the activities restricted to Cairo, it is interesting to mention that as soon as the Cultural Wheel managers started looking for cities in which they could replicate their current well respected business and management model⁶⁵, they received the support from several Governorates. This fact in itself proves the potential for cultural private investment outside Cairo. If this geographical extension succeeds (it will be based on a model closed to franchising) it would represent a very interesting model for other ventures to follow.

99. **In Morocco** a recent study by the *Centre d'Études Sociales, Économiques et Managériales* (CESEM) tried to present a physiognomy of the state of entrepreneurship in the field of culture. Its results are of relative value for this report, since the study mixes cinema with other much weaker cultural industries⁶⁶. Since the study includes also associations with economic activity, but actually funded through public subsidies, it is not totally clear what is the real concept of "entrepreneurship" here. However, it is still an interesting document, and a rare example that approaches the cultural sector specifically from the perspective of creative economy,⁶⁷ which due to its rare economic approach deserves proper attention and study.

⁶⁴ And in any case, this is a national industry concentrated in Cairo or, as it is said, in a specific sector of the Capital. See "Cairo's place as a publishing powerhouse: all but disappeared?" *Daily News Egypt*, November 21, 2012

⁶⁵ **EI Sawy Cultural Weel** is a family owned LLC, which gained independence from the large advertising company which had "hosted" it only a few years ago. It started its activity mainly as one of the very few music scenes in Cairo, in a very particular building near the Nile shore. It is now an organization employing a staff of 160 people, hosting not less than 45 different events per month: performances, workshops, seminars, exhibitions, etc... It has become an essential cultural center in the capital's life, which explains the fact that it is open to the public almost 24 hours a day seven days a week. Its revenues come from the box office, commercial sponsorship, renting its space to third parties, and membership fees. In most cases, artists performing there share the risk on a 50-50 or 60-40 basis. The Centre has received subsidies from the Ministry of Culture, but only on a project by project basis. Foreign cultural agencies have also supported some of its activities, most often by assuming part of their costs.

⁶⁶ Caroline Minialai, **Au royaume des entrepreneurs de la culture**, Published in *Economia* (<http://www.economia.ma>), February 2010

⁶⁷ « We selected the following areas: music, cinema and audiovisual performances, visual arts and broadcasting and cultural events. We position ourselves as the concept of "creative industry" that extends the concept of cultural industry in areas such as cinema or event producers. For each of these areas, we have tried to include all organizations involved in one way or another in the value chain of cultural industries. Therefore, we include production companies, and distribution, communication, post-production, communication and financing». (our translation).

100. The report attributes the weakness and lack of structure of the whole cultural sector to the absence of a real public policy. Companies in the sector are mostly SMEs, and most commonly Limited Liability Companies⁶⁸. And presents the following data, based on its own research (after adding one more voice to the general complaint on the lack of public figures on the cultural sector):

- 96% out of the 169 interviewed companies have less than 50 **employees**. 16% are individually managed companies, and 55% have 1 to 9 employees. All those companies with a staff larger than 50 employees belong to the audiovisual and cinema sector.
- There is a difference of **women** present between the cinema industry, with only 6% of female managers, and visual or performing arts, in which women represent 40% of managers.
- The structures are certainly small: only 20% of the examined companies have a **turnover** of more than 2 Million MA. 37% have a turnover of less than 700.000 MAD.
- 9% of the interviewed companies are totally dependent on the Ministry of Culture or other public **subsidies**. This public support, however, is not granted in cash in 65% of the cases.
- 66% of these companies are **based in** the economical axis Casablanca-Rabat, the other 26% in the rest of the Morocco.
- 42% of the identified companies have been created after the year 2000.

101. It must be noted that the concept of commercial companies which can be considered as part of the creative economy goes beyond those directly related with content production or distribution. Activities related to sound, lightning, box office management, web design, costume and scene design, stage construction, logistics around concerts and festivals, packaging (for example, on the commercial side of arts & crafts), are all to be included in total or partially in this sector. Using standard terminology, the large majority of them are micro or small enterprises. And they should be considered and should benefit from not only the angle of culture and creative industries, but also any policy approach or program intended to supporting SMEs.

II.2.2 Non profit organizations

The previous figures and mentions to cultural entrepreneurship can certainly provide a distorted image of non-governmental cultural activity in both countries examined here.

102. **In Egypt**, the already described immense presence of the State as cultural player and, one could say, as some sort of “cultural services provider”, together with other social, cultural and political factors which exceed the remit of this report, has limited to an enormous extent

⁶⁸ SARL, Société Anonyme à Responsabilité Limitée, or its single shareholder, EURL.

the capacity of social or private initiative in the field of creativity and the arts. The already mentioned “Proposal for a general framework for a new cultural policy in Egypt”, submitted to the People's Assembly Culture, Media and Tourism Committee by the National Cultural Policy Group describes the need for these essential changes as part of the deep transformations it calls for. After it mentions the important potential role of cultural industries in the country's economy, and it calls for the promotion of investment in this field, the authors call as well for “the gradual administrative reform of the Ministry of Culture with an eye to resolving the problem of its overstaffing and to facilitating the shift of the ministry's role from producer and distributor of cultural services and products to chief funder and sponsor of cultural work”.

103. In other words, they request a move **from a State as cultural service provider to another which supports private activity through grants and subsidies**. But this requires a structural change, and also one of mentality: on the public side there is very little room or understanding for private cultural initiatives which could be supported and promoted without actually controlling them. And as a result, there is very little stimulus addressed towards society to put in place private, non governmental, social structures to work in an area, culture, with little or no public support

104. There is still a long way to go in Egypt before the impulse for freedom of culture creativity moves strongly into the direction of stronger social initiative in the production, management, distribution, communication of that cultural activity. Indeed, a softening of the current state control on society will ease this transformation. But there is probably also space for training and for closing the huge current gap between cultural creation and cultural management. Considering the size and population of the country, and leaving aside more naturally commercial and potentially income-generating areas such as cinema and media, private activity and private initiatives can be considered very small, and professionally rather weak.

105. This doesn't mean that there are not new artists emerging, intellectuals and new creators struggling to have their voice heard, their works performed and acknowledged⁶⁹. For example, independent theatre groups (which may not even have a legal structure behind), may receive support from abroad, from institutions such as the Brussels based Young Arab Theater Fund (in itself a non profit initiative receiving funds from other public donors). Foreign festivals and programmers may invite them and assume their costs, often on the basis of private connections and relationships.

⁶⁹ The work of the young theatre writer and director Laila Soliman, interviewed for this report, is internationally acknowledged, for example. But her work and that of her company, remains an exception, one of a few islands of creativity and independence, in the middle of a much poorer landscape, and extremely weak in structural terms.

106. This weakness, in a global perspective, is compatible with the existence of well **organized social initiatives** which have been popping up here and there in the last years. These are initiatives with an actual or potential **local impact through art and culture**: in the field of performance and stage creativity⁷⁰; or as a means to promote tourism through culture in an area such as the Nile Delta⁷¹; or with the purpose to empower marginalized communities by cultivating their aesthetic sense and creativity, and through the activation of social responsibility among artists⁷²; or as a promoter, through camps and other activities, of the Arab youth improvement in digital expression and artistic creation⁷³; or promoting street art and the decentralization of access to contemporary art⁷⁴; or the already mentioned activity mixing street theater and arts&crafts⁷⁵.

As already explained, even some of these initiatives may adopt the legal form of companies, and not of non profit associations, although the economic reality is totally different⁷⁶.

107. **In Morocco**, cultural **associations and “foundations”** are the essential backbone of the country’s existing cultural life. The Government’s intervention or control on them is rather light and formal. Almost every single cultural initiative and project in the country can be related to an association behind it (to the extent that some even see the long arm of the Government behind some supposedly private associations).

108. Associations are generally **weak structures**, financially and in terms of human resources. There are hundreds of associations involved in the cultural field through the

⁷⁰ **Mashroo3 Mareekh** is an initiative to promote self-expression, an outlet to channel ideas and an umbrella to incubate many other self expression initiatives. Mashroo3 Mareekh, which acts through the whole country as a mobile performance adopting different formats, branches out into different projects in different governorates outside Cairo.

⁷¹ **The Foundation for Tourism and Heritage in Fowa** was created as means to try to re-establish some cultural fabric in this city of 60.000 inhabitants, within the Governorate of Kafr el-Sheikh. This is an area with a documented history going back to Ancient Egypt. The Foundation is the initiative of a group of tourist operators and a few local;

⁷² Such is the mission of the **Gudran Association for Art and Development**. Created in 2000 around a project in the fishermen village of El Max, near Alexandria, it has developed afterwards other projects in that city, including street culture, arts and crafts, public spaces for the youth, etc...

⁷³ This is the purpose of the Cairo based **Arab Digital Expression Foundation**, which has organized several training courses for youth in art, cinema, design, web design, and media technology, and it is promoting that same activity through the country.

⁷⁴ **Mahatat Collective for Contemporary Art** is a multi-cultural mobile art initiative, founded in 2011 by four individuals from different national and professional backgrounds. Among other things, it works for decentralization, as a process of continuous de-concentration and diversification of the independent artists and art scenes all over Egypt.

⁷⁵ Collectif Eclats de Lune and Awal’n Art. See §24, note 20.

⁷⁶ Such is the case as well for example for **Makan – Egyptian Centre for Culture and the Art**. This organization, well known as a traditional music venue in Cairo, has a much larger impact in the country as a preserver and sometimes modernizer of Egypt’s cultural memory by researching and documenting its intangible cultural heritage, in direct contact with local communities in their places of origin.

country, and it would be impossible to make a census here. Some may receive public funding, others receive support from the Government or other authorities in the form of materials, access to premises or similar contributions in kind. Some associations combine a cultural role with a very solid and important social commitment. Such is the case in the association Yerma-Gnaoua, who is behind the Gnaoua Festival, and plays an essential role in the protection of Gnaoua cultural heritage and in the social support to that people ⁷⁷.

109. In some cases, though, the cultural activity is organized even without the most basic legal structure or organization. Music groups and bands, including some with an important popular success, manage their resources on a purely reciprocal relationship of trust. It is difficult to see how some of these associations, (and obviously, the “de facto” structures behind some interesting initiatives⁷⁸) could manage both the budget and essential management requirements of a relatively big project.

110. Some of the biggest and to some extent nation-wide private non profit organizations are based in Casablanca, by far the city with the strongest private initiative in the cultural field. It is interesting to note that several of these organizations, and their well respected leaders and promoters, are in fact among the main voices on cultural policy in the country.

Such is the case of **Racines**, the “Association for cultural development in Morocco and in Africa”⁷⁹. Other structures to mention could be **L’Boulevard**, an essential player in Morocco’s music life in the last decade⁸⁰, which is now behind a new initiative of a cultural web radio; or the **Fondation des Arts Vivants**, a strong example evidencing the capacity of Morocco’s private sector ⁸¹. These structures collaborate closely among themselves, although, according to several interviews, the strong personalities behind each one of them may weaken the influence they could have working together⁸²..

⁷⁷ <http://www.festival-gnaoua.net/fr/association>

⁷⁸ As it is the case of the **Hip-Hop Madrassa** in Meknés.

⁷⁹ **Racines’** ambitious goals include lobbying in support of Moroccan and African creative industries; collect and disseminate cultural data and documents; promote debates on arts, culture and creative industries;. building international circuits, to distribute cultural goods and services; Contribute to the training and development of human resources in the fields of culture; Improve the conditions of work and life and the rights of artists and culture professionals.

⁸⁰ Founded in 1999 in Casablanca, **L’Boulevard** describes itself as a “movement” based on volunteer work. By extending into other cities and promoting the image of creative and contemporary young Moroccans it undoubtedly played a decisive role as a “breeding ground” for young groups. Through its “tremplin” programme, it gave the opportunity to a whole generation of musicians to play in front of a large audience, and for the most talented ones, to become successful professional musicians” (Towards a Strategy for Culture...”, p. 50)

⁸¹ Founded in 2004 by a group of theater professionals and lovers, under the presidency of the publicist and highly influential opinion maker Nouredine Ayouch, this Foundation is, besides its activities in support of theatre and performing arts one of the big promoters of public debate on cultural industries in the country.

⁸² **La Fabrique Culturelle des Abattoirs**, the new structure created to manage the important multi-cultural facilities established in the old Casablanca slaughterhouse, is now an association of

111. In some disciplines, and in particular in the area of visual arts, a strong role is also played by non profit organizations (Foundations) directly linked to big industrial conglomerates or to banks. Not only in terms of funders of third parties' activities (which can also be the case), but directly as independent cultural actors. A particular mention in this context is to be made to the **Fondation Ona**,⁸³ Which is well known by the public thanks to the **Villa des Arts de Rabat** and the **Villa des Arts de Casablanca**: two important spaces dedicated to contemporary art and to several other activities in this discipline. But the Fondation Ona plays also a role in other cultural fields (dance, theatre...), and, through its socio-economic division, is starting to play a role as a think tank on cultural diversity, cultural policy and eventually a capacity building center⁸⁴.

II.2.3 Private sponsorship

Private sponsorship for cultural activities is an important element of the cultural landscape in Morocco, much less in Egypt today.

112. A large part of Morocco's cultural life is built around the **incredible number of festivals** taking place all along the country, from spring to autumn. There is not such a thing as a standard structure or business model common to the different festivals. Some of them are directly promoted with public money: it is the case of those directly promoted by the Ministry of Culture, or the Festival of Casablanca, in which the city puts more than 50% of the budget. In other festivals, such as the Gnawa festival, or the Sacred Music Festival in Fés, the private resources can be as high as 80% or 73% of the total budget respectively. Understandably, a large part of this private funding comes from the sponsors. The irruption of a huge festival such as Rabat's Mawazine, promoted from public (Royal) initiative but largely funded by sponsors can absorb an equivalent amount of sponsorship to the whole budget of other festivals. As a result there is a concentration of private support in favor of one festival,

associations, involving **Casamémoire**, **Racines** and **L'Boulevard**. This should contribute to finish its strange legal situation, a real metaphor of the somehow chaotic and unstructured legal life Morocco lives in. The managers at Les Abbatoirs (53.700 sq.m, of which 22.000 are built) which hosts exhibitions or large music concerts have been waiting for years from the local authorities a legal document justifying their title to the building. It is difficult to make long term plans, including structural funding both public and private if you cannot even prove your title to the building. But at the same time, those same "undocumented" managers have always had a de facto position over the building and its activities accepted as valid by the police, firefighters, health services, and all those involved in the organization of a concert with thousands of attendants

⁸³ The Foundation is directly linked to the holding **Omnium Nord Africain (ONA)**.

⁸⁴ Other bank foundations (Attijariwafa Bank, MCI), besides their financial contribution to specific projects, are in fact the most important private exhibition spaces for visual arts in several cities.

while companies cancel or reduce their previous support to others thus, impoverish Morocco's cultural diversity⁸⁵.

113. There are different **business models** related to the business support to culture through **advertising**: telephone companies may establish long term agreements with rock groups, support it financially, and basically purchase its live performances for a large period of time, which are then offered for free under the company's brand⁸⁶. Or, following a well-known model in Europe, a commercial FM radio, such as the very popular **Hit Radio**⁸⁷, may be a sponsor or even the main promoter of a pop-rock concert.

114. A lesser known reality of equal importance and impact can be also mentioned: some big companies, such as O.C.P.⁸⁸ (a company with 18.000 employees), or the Office Nationale de l'Electricité (O.N.E) contract cultural activities on a regular basis addressed to their staff. Moroccan films are shown, and Moroccan artists are called to perform theatre in the company's facilities, with activities often targeted to young audiences.

115. The impact of **foreign private sponsorship** is really minor, at least if we are talking about European companies.⁸⁹ One could imagine, in Morocco at least, that some of the big foreign companies present in the country would perhaps play a role in supporting cultural projects or events, perhaps even in coordination with the embassy of their country of origin, but that is not the case. A particular exception worth mentioning is the annual literary award created by the (French owner of) the well know Mamounia hotel in Marrakesh. The award of 200.000 MAD (18.000 €) is delivered to the best fiction in French by a Moroccan writer.

⁸⁵ The Casablanca Festival used to have a budget of around 35 million MAD, 50% of which supported by sponsors (last year's edition was cancelled). The declared budget of Mawazine's Festival is around 65 million MAD, although several interviewees consider that the real figures must be around 100 million. The Fes Festival reports a budget of 19 million MAD, of which 73% comes from private sponsorship.

⁸⁶ Such was, for example, the successful relationship for a few years an several concerts between Maroc Telecom and the very popular reggae gnawa group **Hoba Hoba Spirit**.

⁸⁷ **Hit Radio** is a perfect example of the dynamism of commercial investment in the cultural industry in the new, more open Morocco. With its 74 different FM stations it covers the whole country, and it is a leading influence in the music sector among the younger generations.

⁸⁸ Office Chériffien des Phosphates

⁸⁹ We are not talking much here about foreign private donors. The essential impact of foreign private foundations and donors is somehow taken for granted in this report, but deserves to be specifically mentioned. It has been very common to see the "long hand" of all sorts of European development funding structures behind most of the cultural initiatives with a social impact. Switzerland, Denmark, Italy, Germany, The Netherlands, and a few others are the countries of origin of discreet, silent funding partners (no big panels, no big logos) in Morocco and in Egypt.

II.2.4 Private Education and training in culture and the arts

116. This mapping exercise would not be complete without a mention to the essential role of the private sector in the field of training and education in the arts and, more generally, in the jobs related to cultural industries.

117. In the case of **Morocco**, this role function is assumed by private **High Schools or Institutes** (delivering a university degree). It would not be responsible to make here a general evaluation of their quality standards in comparison with the public sector. But it can be said that the social perception is that they those centers are more open and flexible in their educational programming, they are perceived as more interdisciplinary, and they are closer to the job market place⁹⁰.

118. **In Egypt**, the **private universities play this important role**. The American University in Cairo, for example, plays a pivotal role in preparing artists, creators and creative industries professionals in its Department of the Arts⁹¹. The German University in Cairo has its own Faculty of Applied Sciences and Arts, specialized in design. And other cultural training in several disciplines is organized by the Jesuit cultural centers (in Cairo and Alexandria). As it is understandable, these training activities suffer from the same centralization as the whole country.

II.3 The collaborative models. Public-Private Partnerships?

119. The gap between those who are working in the cultural field on the public payroll and those who are not is absolutely extraordinary in terms of social perception. Those who consider themselves part of the State too often look to civil society players (both in the commercial and in the non profit field) with suspicion, as people who are essentially unable to have any general interest in their activities. When asking public officials about the possibility of European public funding to support middle term cultural projects, the idea that this could happen without public intervention was not always easily understood or accepted.

120. But the reverse is also true. Those who are working on the private sector express, with very few exceptions, an evident despise for what is public: there is no real sense of social,

⁹⁰ Among others, we can mention: Ecole Supérieure de Communication et de Publicité (Casablanca); École Supérieure d'Architecture de Casablanca; Ecole Supérieure de Design, which includes graphic design, interior design and multimedia); Ecole Supérieure des Arts Visuels (ESAV), in Marrakesh; Ecole Supérieure des Multimédia Informatique et Réseaux (SUPÉMIR), in Casablanca, which covers Multimédia (sound, digital video, 3D, video games...). And, on another academic level, the Ecole Internationale de Musique et de Danse (EIMD), based in Casablanca and Rabat.

⁹¹ Among its titles: [Bachelor of Arts in Theatre](#), [Bachelor of Arts in Graphic Design](#), [Bachelor of Arts in Film](#), [Bachelor of Arts in Visual Arts](#), [Bachelor of Arts in Music Technology](#).

citizen ownership, and public just means owned and controlled by the government (and therefore, not by the people). The idea of working together with a “government” structure in any cultural project was received almost as unreal and of impossible execution. This approach will probably evolve in parallel with a democratic transition. But as long as this does not happen, public-private partnerships may be difficult to build. In the meantime, training and educational public organizations may be the best possible partners to work with.

III. THE ARTS AND CREATIVE INDUSTRIES: SOCIAL AND LEGAL FRAMEWORK

121. An approach to a few of the main elements which constitute the social and legal framework surrounding CCIs, within the limits of this report, may be useful in identifying needs and weaker points

III.1 Training and capacities

122. A constant question in every conversation and questionnaire has been the situation of human resources in the different disciplines. When asked in general terms, the general perception of the country's professional preparation and offer, both in Morocco and in Egypt, is always positive. But when the questioning applies to the particular cases ("are you surrounded by all the qualified people you would need?") the answers are much more nuanced. There is almost unanimity in the need to reinforce the **management capacities**, in the largest sense of this concept, of those involved in cultural activities. "Lack of professionalization" is the concept most repeated by the interviewees.

123. **Technical capacity** in the diverse jobs around cultural industries (sound recording or mixing, lighting, technological services...) does not appear to be an issue when it refers to average professionals. Some did mention, however, the insufficient preparation available to cover higher jobs in this area, particularly when it comes to meeting first level professional standards⁹². In Egypt, the insufficiency or lack of such resources outside Cairo, together with the lack of acceptable technical equipment in the few available venues, is presented as one of the main reasons why it is too expensive for independently produced performance to circulate.

124. **Programming** is also an area with little or no expertise. The fact that the majority of those in charge of public venues are often officials with little or no experience in the cultural field results in spaces with little more than that: spaces, instead of cultural centers with a diversified program, in coordination with creators and performers

III.2 Communication

⁹² Some contradictory replies have been received regarding this aspect in the case of Morocco. The multiplication of festivals has created a demand of technicians and equipment which has been dealt with sometimes internally (as in the case of **Mawazine**), or by a group of event management companies developed in the last years.

125. **Public communication** in the field of culture and the arts appears to be a field in need of support, training and capacity building. Several interviewees complained about the lack of journalists with a minimum of preparation in this field⁹³, and the lack of understanding by their editors. Information on culture, here understood as information on cultural activities, events and projects, is progressively disappearing from the media⁹⁴. According to several interviews, television is already considered a lost battle. The situation is different for magazines, written press and even radio. But there is a consensus in describing an important gap between cultural activities, the basic cultural knowledge and an understanding of those who should inform about them. This includes theater or music events reviews, writers' promotions: there is less and less people prepared to do it.

126. In a way, it must be noted that on the problem with the presence of culture in the media should be considered, and dealt with, from a much wider perspective: there is a grave problem with the **social reputation of culture**, of creativity, of cultural jobs and cultural activities. So the issue of communication is not only an issue of creating audiences for a play or readers for a book: it is also an issue of attracting people into turning their personal creativity into a way of life; a way to communicate the long term impact of cultural initiatives... and the social and also economic consequences for a country if cultural expression is in the best case a memory of the past, or something imported on TV. And this requires a social environment of respect for cultural professions, which is among other things a long term communication exercise. If culture is pure entertainment for the public, only commercially viable and mass entertaining products receive media attention⁹⁵. It is a responsibility of public authorities and of opinion makers to create an atmosphere in which cultural creation is projected as a value, as an asset, both for the country and for those intervening in it. In Egypt, the state's quasi- monopoly on culture production doesn't help at all to reach this goal. In Morocco, the exaggerated role of festivals is transforming the cultural landscape into a succession of public events, leaving no cultural trace behind, even at a local level. This situation, combined with other elements already described, such as the lack of available venues for cultural activities on a stable basis, means with no continuity, no creative stability, and little visibility for any creative work which is not ready to attract a massive audience.

⁹³ Anecdotic evidence was mentioned in the interviews, such as the conflict between a publisher and a radio station as a writer was invited to present his new book, just to end being interviewed on many other topics since nobody in the studio knew nothing about the book he had written. Theatre plays are less and less reviewed.

⁹⁴ Cultural events and productions receive less attention in the media, as it is proven in Morocco for example by the cancellation in the last years of several culture newspaper supplements.

⁹⁵ As everywhere, television has a huge impact in the construction of social perceptions. But it has little impact outside the world of soap operas and, more recently, pop music. There is a new "music star system" taking place in Morocco through the action of foreign pan-arabic commercial TVs, mainly from Lebanon (in which several cultural players see a long term attack on cultural diversity, much in the way some in Europe may see the pan European English speaking music TV channels). There have been cases of singers with no particular recognition in the country which have been turned into national stars through the imported impact of these foreign broadcasts.

127. From the perspective of the cultural players, the **limited and poor online presence** of many of them⁹⁶ demonstrates the limited importance its promoters give to internet visibility, as well as a possible limited knowledge of basic web design instruments. It is not clear if the absence of an English version in many websites, in particular in several arab-only web pages in Egypt, is a free decision or just the result of difficulties to organize it differently, particularly in terms of translation costs, etc.... In any case, this adds to the poor online presence of those countries' cultural realities, which obviously has an impact on their visibility, in regard to their own national audiences, and abroad.

128. This situation is compatible with the existence of some well-respected and professional companies working in the field of **communication and cultural events management** and production. But their expertise is naturally concentrated in the big events and festivals they organize or they provide services to⁹⁷. They mostly train their professionals inside the company. These companies and professionals could well play a significant role in the training of managers of cultural centers; and indeed, could evolve into promoters of new private multifunctional cultural centers... if only their economic viability had some potential.

III.3 Employment and social conditions

129. Professionals working in artistic and creative fields have difficulties in many countries (including Europe) regarding the issues of labor law and social protection.. That is why specific systems and rules not only in Morocco and Egypt, have been implemented, which take into account the nature of their work.

In Egypt, artists linked to state owned organizations have a treatment which basically assimilates them to other public employees. But those in the independent side of culture have extreme difficulties organizing their work in a professional way (in Morocco, as well). Besides the lack of social recognition at the start of any artistic career (which can be a strong deterrent for creative people to enter the cultural field), and outside the audiovisual world, the position of independent musicians, actors, dancers, writers, etc... is such that full time professionals living out of their art expertise and skills are an exception. The important syndicates linked to cultural activities, already mentioned here, is seen as almost alien and ineffective regarding those who are not "inside" the public system or circuit. As part of the current revolutionary moment, there are efforts to create one or two new unions in the arts world.

⁹⁶ Several cultural projects, and the institutions behind them, have only a simple facebook page as a witness of their online presence. A blog within the online available models (Wordpress, etc...) is already a step forward. When there is a web page in a dedicated host domain, it is rare to see its content really updated.

⁹⁷ A strong example is the Casablanca based group composed by **A3 and Rezo**. With 30 employees, they are the main organizers of the **Gnaoua Festival**, among many other activities in cultural events production and communication

130. In Morocco a law approved on June 17 2003 established the “**Statut de l’Artiste**”, and determined certain rights in their favor in the context of labor law. The whole system is based on the fact of receiving the condition of “artist”, which is granted by the Ministry of Culture on approval from a committee specifically charged with this duty. Some artists reject this method of a two-fold review of their work and CV, and this whole procedure was under review at the time of this report. Only those who have been granted the status as artist (with their families) are accepted into the social security system structure dedicated to their field (la **Mutuelle Nationale des Artistes**).

III.4 Intellectual property

131. There is **no economy of culture without intellectual property**. There is no intellectual property in a country without a clear legal framework, and efficient structures to implement it and put it into practice. Equally, there is no way to develop such a legal framework and make those structures work if there is not a basic social understanding of the role and importance of intellectual property rights, especially among those who are supposed to pay for them, to benefit for them, and implement them.

Except for the theoretical legal framework, almost every element in the previous description is problematic or altogether missing, in regards to copyright in Morocco and Egypt. Both countries have intellectual property laws, as well as neighbor rights, and are signatory parts to the basic international conventions in this subject, so copyright and neighboring rights are formally protected. But reality is different.

132. In Egypt, **intellectual property is directly managed by** a department within the Ministry of Culture. But in fact IP is somehow “outside” the cultural reality of the country. This is not an issue of piracy: that is an issue for foreign films indeed, but for national cultural production the problem precedes this: most of it is not even registered. It is perceived by many as a useless effort and an administrative burden which will produce no benefit. Many artists won’t even register their works (in some case, as the censorship office⁹⁸ is closely link to those in charge of copyright). There is in fact the feeling that registering represents granting the government some authority or requesting some permit on content. Others, as soon as they start having some success, will register their works abroad, mostly in Europe. And there is little if any repartition of revenues for those who do register in Egypt.

133. In Morocco, at least it can be said that the management of copyright is an important issue of debate among cultural stakeholders, and even the Government acknowledges the need to reform and is currently in process of making necessary changes.

⁹⁸ Although it appears not to be applied since the revolution, the law still requires that every single playwright must be approved by the Ministry before it can be performed in a theatre.

134. The **Bureau Marocain des Droits d’Auteur (BMDA)**, which depends on the Ministry of Communications, is responsible for copyright enforcement, and for collecting and distributing the corresponding payments to authors in all cultural disciplines⁹⁹. The BMDA manages its international activity through its French counterpart, **SACEM**. It has also reciprocity agreements with other collecting societies, such as **SACD and SCAM**.

135. Only 2.000 people are registered as authors in the BMDA. According to the owner of **Hit Radio**, his radio broadcasts a large majority of artists that are not registered as authors¹⁰⁰. This reality proves the authors’ lack of trust in the collecting society which are supposedly to work for them: there is an absent sense of ownership which is common among authors and collecting societies elsewhere¹⁰¹. This small figure of registered authors may partially explain why the BMDA spends around 40% of its revenues on its own internal management. While this is proof of mismanagement for some, it is just a problem of proportion for others: with more authors to pay based on more revenues received, the part of management would be smaller. Why so little revenues? Besides this evident vicious circle generated by authors who boycott and impoverish an organization they don’t respect. it appears that the main areas to be reviewed within the BMDA (other unverified management accusations left aside) are on the collecting side (from broadcasters, public places ...), and on the management of its catalogue.

136. In other fields, such as design, for example, there is in fact no protection of copyright at all. Books are theoretically covered, but remuneration to authors comes through their publishers, and piracy through photocopies (important in educational publications) is considered for many as a lost battle. The Rector of **IRCAM** also denounces the practical inexistence of IP rights for the amazigh culture.

⁹⁹ The BMDA legal structure is currently on revision. Its current dependence from the Ministry of Communications is a matter of debate inside the Government itself. At the end of this reform process, it is to become an “Etablissement Public”, which should give it more flexibility and higher independence.

¹⁰⁰ Mr. **Younes Boumedi** offers an unverified figure of 90% of artists not registered. Hit Radio, which has a revenues agreement with the BMDA, and declares yearly payments of 550.000 MAD to it, dedicates direct efforts to promote the registration of music authors as an essential element to be able to claim their rights. Two anecdotes have awakened some spirits. When the Swiss collecting society contacted SACEM to pay 12.500 € it had collected in the country, it appeared that the beneficiary, **Hoba Hoba Grpoup**, was not registered. It only did it afterwards, and the money was paid retroactively. A similar situation arise when a Moroccan artist saw her music been incorporated into a commercial. When she tried to claim for compensation, it appeared that she had not registered he work at all. The conflict was eventually solved.

¹⁰¹ There have been fierce attacks on the BMDA, its management and its accountability. But those attacks, such as those led by the **Hip Hop group HKayne**, are moving from external boycott without registration to demands done by registered authors. If, as announced, the reforms include changes in the election to the boards, the legitimacy of the organization among Moroccan authors will change in the next years.

III.5 Mobility and regional dimension

137. **Mobility of artists and culture professionals** is conditioned by different factors: the visa legal framework; the possibility to travel on a cheap basis, the actual opportunities to travel abroad in the context of the development of a cultural activity ¹⁰². Regarding Visas, in objective/legal terms the situation is not very different in both countries¹⁰³.

138. But the perception is different ¹⁰⁴ In Egypt, those independent artists who want to travel abroad don't feel particular restrictions to do so, as long as they can afford it, or they receive invitations from foreign festivals or organizations. The lack of solid structures in the cultural field has an effect in the issue of visa obtention, in particular to access the Schengen area: those without a stable and structured work relationship and the capacity to prove it, such as actors, have an additional difficulty when invited to take part in foreign events¹⁰⁵. Geography counts as well, of course: Egyptians have easy cheap mobility with most neighboring countries which are culturally close (Syria, Lebanon, Jordan, Gulf countries)..

139. In Morocco, the issue of international mobility is perceived differently. It is not easy to travel even to neighbor countries which are, on paper at least, culturally closer.. However, notwithstanding these difficulties, there is travel and some circulation of artists from Morocco to take part in cultural events of different sorts in Europe.

140. As in many other aspects of Morocco's economy, trade of goods or services South to South is very poor, and with the Algerian neighbor, practically nonexistent¹⁰⁶. Publishing is too small for any book export to really take place; singers, except those who are promoted within

¹⁰² A particular and important role is played here by the European mobility funds, such as the Young Arab Theater Fund, or the **Roberto Cimetta** fund.

¹⁰³ At least 70 countries/territories grant visa-free or visa-on-arrival to holders of an ordinary Moroccan passport, and 39 of them are visa-free accessible, compared to 56 and 39, respectively, in the case of Egyptian citizens (compilation with sources at http://en.wikipedia.org/wiki/Visa_requirements_for_Moroccan_citizens and http://en.wikipedia.org/wiki/Visa_requirements_for_Egyptian_citizens)

¹⁰⁴ This may have to do with the evident emigration differences between Egypt and Morocco, which creates more difficulties to the latter; but also with the fact that visas are conditioned, among other requirements, to the fact of being able to prove a "structured existence" (revenue, bank account, labour contract...). Thus, the more informal the life of the artist, the more difficult to get a visa.

¹⁰⁵ Morocco's **Hip Hop Group H Kayne** recalls the day when they were asked to perform at some corridor of the German Consulate, as means to proof their identity as musicians and obtain the visa they had applied for. The close relationship of Morocco's arts organizations with many in France and with the French cultural establishment is always helpful to get a visa, and can makes more evident the situation of those outside that network. Under certain conditions, a few artists have been granted a special sort of French visa, "Compétences et talents" (<http://vosdroits.service-public.fr/F16922.xhtml>) which has eased enormously their relationship with the whole EU.

¹⁰⁶ A few examples of young people and even performers travelling from Algeria to take part in events in Morocco not far from the border have been reported. They were tacitly consented by both governments, leaving them in a sort of limbo, the possibilities and limits of which remain to be explored.

the orbit of pan-arab TV, have no presence in the arab or the Mediterranean region outside their country... and among the 4,5 million Moroccans who live in Europe. Technicians related to cultural industries travel rarely abroad. And there is no regional competition or exchange in technical services related to festivals and other cultural events¹⁰⁷.

141. There is a general concern about the inexistence of any structure, public or private, contributing to this international presence of artists and projects, or help to simplify it. There are, of course, in both examined countries, international programs linked to their Ministries of Culture, but those are understood as instruments of national promotion, in which the state interferes (or so it is perceived) with the content of the cultural activity or project to be developed abroad. There is no such thing as support to the internalization of cultural industries, of which weak internet presence does not help to fill this gap.

142. Is there a real South Mediterranean **regional dimension** in the development of culture and creative industries? A deep reply to this question should be based in currently unavailable figures and statistics on the presence in one country of music, books, theater and performing arts productions, etc... created or produced in another one. Or, analyze the real impact of co-productions. But even without that detailed data information, and based in the series of interviews and available documentation referring to Morocco and Egypt, an answer can be given: the regional dimension is very limited or almost non existent, in terms of import-export of cultural products, in terms of regional exchange of cultural services, in terms of coproductions. This can be confirmed, to a slightly different extent, in each of the disciplines analyzed here. The only exception is commercial or "hit" popular music, as it is mentioned afterwards: arab speaking TV channels do have a unifying regional impact. But in that case we should not speak about actual regional "exchange", but better about regional cultural hegemony.

¹⁰⁷ The market can be so distorted that two different interviewees refer examples in which the rental in Europe of high quality sound equipment for a concert is cheaper than the rental in any other Mediterranean country or even, on high season, in some other places in Morocco.

IV. A DISCIPLINARY OR SECTOR APPROACH

143. The last part of this report will have a closer approach to some cultural and creative industries or disciplines in particular. In the case of Morocco, an important source for data and judgements are the already quoted minutes of a Colloquium held in Casablanca which closed several days of work and analysis on the situation of the cultural sector in the country¹⁰⁸.

IV.1 Music

MOROCCO

144. There are **several new groups in the Moroccan music scene**, some extremely popular, and followed by large audiences (hip.hop, rock, fusion). But this does not necessarily mean that there is a “music industry” worth of that name: it would be difficult to speak about many of those groups, and the structure behind them, in real economic or professional terms. Records are self-produced, box office is a term strange to many, and some of those groups do not even exist in the legal, economic or fiscal world. They are often just a group of individuals sharing revenues as friends would do.

144. Groups and bands have some opportunities to perform live in small events and venues during the year, but the essential part of their professional life and income revolves around festivals, which represent the main income for many of them.

145. **Internet** is indeed a strong element of visibility for this new music scene, and it is often used as means of distribution (through You Tube or other channels). But it's the “free internet” they use. There is little culture and little structure to organize music licensing online through the new music platforms. There have been contracts signed with intermediaries, licensing music online worldwide. But as there have been no returns up to now, internet music channels are still considered marginal in terms of business model and, de facto, neglected¹⁰⁹. Consequently, no or very little attention is given to the huge foreign music market composed not only by other potential listeners in the Region, but by Morocco's “diaspora”, where there are millions of young potential internet and radio listeners (and purchasers) of good Moroccan music¹¹⁰. It is not difficult to imagine the revenues available to authors who produce their music in Morocco and are listened to via iTunes or Spotify in Paris or Brussels, and repaid to Morocco through proper license schemes.

¹⁰⁸ “Pour un Maroc de la Culture”, Actes du Colloque, Casablanca 29 juin 2012

¹⁰⁹ Online paid music in Morocco, as e-trade in general, suffers from the restrictions imposed on credit card payments. There are means to circumvent it, through pre-paid cards and others, but still it is clear that unless e-trade is promoted and supported online legal distribution of culture will be extremely limited.

¹¹⁰ An example of Moroccan online music, particularly strong in relation to Amazigh music, is <http://www.amayno.ma/tags/warda-vision/>

146. Music on CDs is still alive in the country, in its own way. Based on figures from customs and estimations from Hit Radio, 45 million pirate CDs and DVDs are sold per year. Regarding the sales of CDs, 65% are of local music, 25% of arab music, and 10% international. We can still say “sold”: the largest piracy is still one of illegal sales, not one of illegal downloading¹¹¹. However, in fact, there is practically no such a thing as a legal music market or circuit. CDs are sold in gas stations and other similar locations. Very often, groups, who self-produce their own records, sell them through the “illegal” circuit which distribute pirate content. .

147. There are two symphonic orchestras in the country; and folklore and popular music are also part of the picture. However, these are badly influenced (in the words of the said document “Pour un Maroc de la Culture”) by : “the sinking of the popular arts in the repetition and clichés, with no prospect of enrichment and development, the corollary being the maintenance **of rural artists in a lethargic situation**”, and “the persistence of an **assitantship mentality** installed since the sixties, a spirit that begins to be partially demolished by the youth of the New Scene”.

EGYPT

148. The strong situation of **commercial music in Egypt** is well described in a recent enough British academic paper¹¹², on which this information is largely based. The mainstream commercial music market is dominated by a few major recording companies, most notably **Rotana** followed by **Alam El Phan**. Both labels own their satellite channels, which act as important outlets for promoting singers through music videos.

Rotana has 75% of the Arabic music market share. The company has a set of 6 satellite channels, 4 of which are dedicated to music; Alam El Phan has 2 music channels. No other smaller companies own satellite channels, and their market share is much smaller.

148. Some companies have found it difficult to continue producing music for singers, since they have no music channels on which they can broadcast video clips for their stars, which is a cornerstone to the album’s success.

The importance of record labels derives on the fact that they assume the role of music producer and distributor at the same time, which is not the case in the international model.

¹¹¹ A DVD may cost 8-10 MAD, a music CD, 5-8.

¹¹² **Stories from Egypt’s music industry**. From “Access to Knowledge in Egypt: New Research on Intellectual Property, Innovation and Development” Edited by Lea Shaver and Nagla Rizk. Bloomsbury Academic, 2010. Its authors start underlining clearly underlines what we know: that “there are no publicly available statistics on sales, revenues or employment within Egypt’s music industry”.

149. The mainstream labels have also created their own digital download business models¹¹³. As a result of these intensive business efforts and bets, mobile phones are becoming a growing platform for music delivery in Egypt. Besides these models, there are also independent websites that also offer legal downloads.

150. The importance of video clips is matched only by the significant role played by the live scene in promoting pop stars in Egypt. Traditional culture carries on in the prominent play that live performances continue to enjoy: popular beach parties featuring pop singers, live performances in major hotels, (especially in festive times and during holiday seasons), and wedding parties¹¹⁴, which play an essential role in the live music industry through the country.

151. A separate mention can be made to the efforts developed to preserve and simultaneously, as much as possible, modernize or “bring to the present” the extreme richness of Egypt’s traditional music life through digital means¹¹⁵. There is a large potential of new activities here, through the use of digitization not only as means of preservation of content in its way to extinction, but also as the necessary step to bring new life to old musical creations and traditions.

¹¹³ In the case of **Rotana**, its website sells mp3 music paid for by credit cards. **Alam El Phan**, on the other hand, has developed a more complex model available only for Egypt: Streaming and downloading of songs and videos are paid for by credit points earned by hours of access to the Internet through a particular dial-up number. **Alam El Phan** also introduced another venue for music downloads via mobile phone: **Mazzikabox.com**, whereby Arabic music is downloaded to mobile phones via software that is freely provided. Songs are sold for LE1 (less than \$0.20), which is deducted from the customer’s phone credit and paid automatically upon the song download.

¹¹⁴ “In the Arab culture, marriage is a highly celebrated life event. Egyptians have a strong preference for live music at wedding parties, which emphasizes the nature of music as an experience good rather than a commodity. The small stratum of the upper class tends to make an excessively lavish show of its wealth in the form of extravagant weddings. This flagrant show of luxury is especially seen among families with newly acquired wealth. Families may live in debt, if only to ensure that their sons and daughters have the proper and prestigious wedding. The choice of a wedding singer is a most important status symbol. Pop stars are usually at the center of this choice, and are, naturally, in high demand”

¹¹⁵ **Makan** declares 30 terabytes of video recorded material, a sort of national backup of Egypt’s cultural diversity. From the ancient gypsy music to the music (and instruments) of the Nubians, all falls under this preservation-modernization exercise. And there are visible examples proving that there are real possibilities of connecting this efforts with a much larger international cultivated demand. The most spectacular of those is the record “**Mozart in Egypt**”, which delicately combines music from the child prodigy, played and recorded by an orchestra in Bulgaria, and ancient traditional Egyptian music in the original instruments, played and recorded in Egypt. This excellent production created by **Makan**’s managers was distributed by Virgin records, and has sold up to date a total of 650.000 CDs. Practically no benefit from those sales has returned back to Egypt.

IV.2 Theater and performing arts

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152. The theater reality can be summarized as follows: there are 15 independent theater groups in the country, of which 6 or 7 can be considered reasonably solid or stable.¹¹⁶ Theater is also part of the national festival “circuit”: on is a national festival, funded by the Ministry of Culture; several are regional public festivals; and four are festivals initiated by civil society, two of them in Casablanca. Theater screenplay authorship, however, is rather limited: a few authors have been dominant for decades.

153. Theater suffers from the absence of cultural venues, a problem previously described. The Ministry funds around ten productions per year. The rest are mostly “self productions”, with the help of limited sponsorship and sometimes local public support. Foreign public and private donors and agencies are also important funding partners, but often within the framework of their own cultural programming

154. Training appears to be a real concern: apart from ISADAC, there is general debate about the quality of professional training available.

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155. In general terms, independent theatre includes all productions created outside of the realm of the Ministry of Culture and government financing; it includes artists who are not accommodated by the Egyptian national theater. Performances in dance, storytelling, and stage theatre typically take place within privately owned spaces, as well as foreign cultural institutions, and a handful of local festivals. Most of the independent art scene in Egypt is still concentrated in downtown Cairo.

“The bureaucratic mechanisms of the Ministry of Culture have made it virtually impossible for alternative and experimental theatre and contemporary dance to efficiently develop, amongst many other art forms”¹¹⁷.

156. The previously described problems of legal entity apply here. Companies do not want to adopt the commercial, LLC form. But they do not apply for recognition as associations either, to preserve creative independence from Government. As a result, the lack of a legal framework makes it virtually impossible for independent theatre or dance troupes to receive funding from the Ministry of Culture because often times, they are not considered legal entities by the government. This ongoing predicament leaves proper funding and resourcing

¹¹⁶ To this, other theatre expressions have some success, even in business terms: stand up comedies; and French imported comedies.

¹¹⁷ “Independent Theatre: A political satire or a tragedy?” Maha EINabawi, Community Times, February 12, 2013. This article is the main source of this section.

inaccessible to independent troupes which forces the artists to self-finance each production with little hope of a financial return on their investment.

157. The contemporary dance industry in Egypt also runs into several of the same issues as independent stage theatre with most notably a lack of funds, little accessibility to rehearsal and performances spaces, and the void of continuing education programs. These ailments are also a direct result of the bureaucratic mechanisms associated with the previous regime.

158. Festivals are a crucial component in the ongoing development of independent theatre and culture in Egypt. But, once again, it is extremely difficult to find any of them, more generally, any activity, outside Cairo and slightly with Alexandria ¹¹⁸.

IV.3 Visual arts

In Morocco

159. According to the report « Pour un Maroc de la Culture », the reputation of famous training schools of Fine Arts has been lost, often becoming a place of confrontation between conservative and modern teaching.

160. On the trade side, **Moroccan galleries** born during the years from 1950 to 1970 have gradually disappeared, leaving little commercial space for artists who are then forced to sell their artwork in their private studios. Thus creating a vicious circle, in which new art galleries have difficulties to survive if art is sold informally and thus cheaper. There is also unfair competition between galleries and art dealers in apartments. A factor which can be lend to the critical issue of forgery, the lack of infrastructure to organize major professional events, and the lack of Museums with an art acquisition program.

161. There is strong criticism on the rigidity of some legal rules on the sales and exports of works of art, even modern. Paintings and other artworks are too often assimilated to capital or national heritage, which enormously impedes their export, and damages the visibility of Moroccan artists abroad.

In this panorama, those contemporary artists under 40 who are exploring new visual arts such as photography, video and installations, seem to have even more difficulties to promote their art ¹¹⁹.

¹¹⁸ It is rather interesting to see how a long, well documented deep article such as the one quoted in the previous note, published in the English speaking online cultural magazine “Community Times” , does not mention one single element on theatre and dance outside the capital (and once Alexandria).

¹¹⁹ «Pour un Maroc de la Culture”, Actes du Colloque, Casablanca 29 juin 2012. ”

162. **In Egypt**, since this report is intended to deal with the reality taking place or having an impact outside Cairo, interviews and available documentation show that there is little to say on visual arts (as a private sector) happening outside the capital, and eventually Alexandria.

IV.4 Books, publishing and writing

163. As already explained, **in Egypt** the only strong publishing industry is concentrated in Cairo, and is now in big turmoil due to its strong financial dependence on subsidies from the State. In the rest of the country, books are mostly distributed through the public bookshops of the General Egyptian Book Organization and its network of booksellers, one per Governorate.

164. The CAPMAS statistics (attached in Annex) provide some figures on **book publishing** between 2006 and 2010, a year in which, according to the Statistics agency, a total of 2.632 books were published, with a total number of copies of 89.250.000 This includes the 23 218.000 books dedicated to language learning. It is not easy to say how much of this was sold in Egypt, or exported, or is just waiting on a warehouse somewhere.¹²⁰

In Morocco:

165. **Book production** in Morocco is very low. This weakness reflects both in the proportion of titles published as in the number of copies printed. A deadly combination of illiteracy, poverty, the lack of investment capital in publishing, the lack of appropriate infrastructure, has a negative impact on the book industry and in book consumption that is, simply put, reading. The problem is also the scarcity of authors. It is obvious that in a country where more than 40% of the population is illiterate, there can't be a plethora of writers. Efforts in the field of education can, in the best case, increase the number of readers, but much more is needed of authors to produce.

166. An approach to data and figures doesn't leaves an optimistic scenario in the book sector (and we exclude here educational books)

- Around **2.400 titles** are published every year, according to the National Library which manages the legal deposit. The Library Managers acknowledge that around a 20% of book production is not registered. Of these, only around 1.200 can be considered real creation (that is, excluding conferences reports and so on). Which leads us to a figure of around 1000 titles a year, all languages combined (Arabic, French, Amazigh, etc.)¹²¹. There are around 40 books in Amazigh published every year.

¹²⁰ With a certainly non scientific approach, during the mission a small survey was done to verify the publishers of the Arab version of several bestsellers on sale in street kiosks ("The Da Vinci Code", and similar novels). The result was that they were all imported from Lebanon.

¹²¹ In this context, the direct support provided by the French cultural agency acquires a more relevant role. This support included the translation and publishing of 11 titles in 2005, 14 titles in 2006, 4 titles in 2007, one title in 2008, 11 titles in 2009 and 12 in 2010.

- The **average print** run today is about 1.500 copies (when a few years ago, it was around the 3.000 to 4.000 copies).
- There are no more than **20 publishers** who can edit fifteen titles a year .
- There are only **4 or 5 distribution companies** of books throughout Morocco.
- There are **a hundred libraries** in the country, but only 30 to 40 are properly equipped with books, although they are desperately short of skilled staff.
- There are **no local libraries**. And there are almost no libraries in schools and colleges. Not even all Universities or faculties have libraries. There are **less than two million books** in all the existing libraries in Morocco.
- As for **bookshops**, there are around little more than a hundred professional bookshops throughout Morocco (that is, less than a bookshop for 350.000 inhabitants). If “book selling points” include tobacco **shops or groceries** selling some print materials, the figure can raise to 1000¹²².

167. Regarding **book distribution**, the whole process is in itself completely out of date: bookshops do not have computers nor do they control their stock. A publisher and distributor interviewed for the report explains how he goes through the country with his track every three – four weeks, delivering books to bookshops on the spot, without previous orders.

168. The situation of the publishing industry requires the earnest attention. We are not only talking about the failure of an industry, but also about the total downfall of reading, and with it, of the development of imagination, reflection, and thus of creativity.

169. If the book industry is in crisis in both analyzed countries it is not only due to economic, structural business reasons (which are also true). In Morocco in particular, there is also a very important issue of demand, of **audience**. To reinforce a book culture in Morocco is an effort which may only produce effects in one or two generations. It is not only an issue of reducing illiteracy, which remains with extremely high rates; we are talking about the need to reinforce (to re-create, even) a culture of reading, a different relationship with written words, with storytelling, with narrative. In Morocco this is cause of real concern, as reflected in different interviews and confirmed by circulation figures. But such a change, if it is possible, it will only happen with a real involvement of teachers of primary school. In fact, several interviewees describe a problem which reaches not only a lack of readers, but progressively a lack of new writers¹²³.

¹²² Figures based on interviews and on the document “Pour un Maroc...”

¹²³ According to several interviewed people, the literary problem in Morocco, the poor reading figures and poor number of writers has a direct relationship with an approach to multilingualism in the educational system, which is subject of passionate social arguments and which is certainly original in comparative terms. The result, some experts say, may be that even those who reach a high cultural level have poor linguistic skills in the three languages consecutively present in the educational system: French, “Classical” Arabic and Darija (Moroccan Arabic). This is not the place to develop this issue.

And besides that, “if you are a writer and you want to succeed, you will publish in Paris or Beirut, not in Morocco”, as one of the interviewees clearly stated. Therefore, any program intended to support “books” or “publishing” in Morocco will not be effective if it just deals with the publishing industry (the “offer” side), or even less if it is reduced to building libraries: it requires the design of a global new policy, which would only succeed if it is coordinated with the educational dimension (generating “demand” in the midterm).

170. **Internet sales and digital publishing** are almost non-existent. Digitization of books is slowly happening, in particular at the National Library, but it is dedicated for now to old books and manuscripts. That is, as for now digitization is not a way to increase the availability of books which could be interesting to a general audience. T

IV.5 Arts & Crafts and design

171. **Design** does not belong to the traditional cultural industries such as cinema, music or visual arts, but belongs to the so-called creative sectors (including fashion, home interiors, crafts design, ...). It is therefore considered an important part of the creative economy. And a very important part, one could say, in economies where arts and crafts are the main or the only source of income to a large part of the population in less developed areas¹²⁴. It is therefore one of the areas within the creative economy with the strongest **local impact**.

172. In Morocco design does not have a specific or separated identified training scheme in the public system. Schools of architecture play an important role in training for that purpose, and other professionals are joining in from different personal tracks linked with visual arts, or just trained abroad, mainly in France. There is also an important school in Casablanca¹²⁵.

173. There is a growing perception in the country that design and its creativity deserves respect and recognition, and has an important role to play in economic life. One of the best-known Moroccan designers, Hicham Lalou, promoted in 2010 the creation of the new Fédération Marocaine du Design et du Design Industriel. Another designer, Réda Bouamrani,

But it is important to mention that it is intrinsically related to any long-term strategy on the subject of reading and writing, including creative writing.

¹²⁴ “Artisanal products are those produced by artisans, either completely by hand, or with the help of hand tools or even mechanical means, as long as the direct manual contribution of the artisan remains the most substantial component of the finished product. These are produced without restriction in terms of quantity and using raw materials from sustainable resources. The special nature of artisanal products derives from their distinctive features, which can be utilitarian, aesthetic, artistic, creative, culturally attached, decorative, functional, traditional, religiously and socially symbolic and significant.” (definition adopted by the UNESCO/ITC Symposium “Crafts and the international market: trade and customs codification” - Manila, 6-8 October 1997)

¹²⁵ **Art’Com, Ecole Supérieure de Design** (<http://www.ecole-artcom.com/>). The CEO of one of the biggest advertisement companies in Morocco, **Shem’s** (<http://www.shemspub.com/>) declared that they hired several of the professionals from that school.

has recently promoted an association, “Designers du Maroc”, with this same spirit of promoting design.

174. In the specific field of arts and crafts, the very existence of a “**Ministère de l’Artisanat**” is witness to the importance of this field in the country’s development. The Ministry acknowledges a figure of 371.000 people working in what could be called creative arts and crafts. UNESCO describes this as “artisanship with a strong cultural component”¹²⁶

175. Fenyadi, a Moroccan company created in 2009 by a group of local and foreign investors, and specializing in high end artisan products, is also good evidence of the strength which can derive from the fusion of talented international designers with the ancestral know-how of Moroccan craftsmen.

176. It is needless to say the millenary tradition of artisanship and design in **Egypt**. That’s why it may be a bit surprising to see how under developed this creative industry is compared to its huge potential. In addition to how difficult it is to promote its economic impact outside Cairo¹²⁷. The large majority of galleries and trade establishments which are at the end of the chain, starting with arts and crafts in remote villages, are based in Cairo. There is an effort to bring progressively a professional dimension to this industry at its various levels. Designers in Cairo and Alexandria can produce creative designs to be implemented in remote corners of the country in a more or less regular or professional manner.¹²⁸ The Government, through the Ministry of Social Affairs manages a series of “associations” which operate in each governorate in this field. Some of them cooperate with private associations and individuals. Foreign development organizations play also a role through workshops in which producers, designers, distributors, receive capacity building support not only in design and mainly in marketing, management, and so on.

A lot could be improved and strengthened here regarding the access of these creative products to the international market

¹²⁶ UNESCO has studied in depth, in collaboration with the Ministry of Culture and with other development Agencies, the situation of arts and crafts in Morocco. This includes even a detailed classification in categories of arts and crafts. That analysis, following UNESCO’s methodology and terminology has not been reproduced here, but can be found in the different documents mentioned in the bibliographical Annex to this report.

¹²⁷ A well-known jewelry designer based in Cairo, **Azza Fahmy**, had the intention to set up a new school of jewelry design in the south of Aswan, in the Nubia area. Bureaucracy and logistics proved that too complicated. She created the school in Cairo, where she brings people from Aswan for several months at a time.

¹²⁸ According to the experience of one of the interviewees, **Rehab Mansour** (“Melbalad Gallery”) who designs and sells artisan products from all around the country, only 50-60% of her providers can be considered professionals; but of these, only 25 % are people who work in this sector on a regular basis, with some sort of daily schedule, using professional means and basic structured organization.

V. FINAL CONSIDERATIONS

177. Before concluding, it may be useful to have a look into the information contained in the previous pages from the specific angle of the assignment which generated this report.

178. It should be noted that culture cannot be reduced to the approach used to write these pages, **from the point of view of its social and economic impact**. Nor can cultural expressions be measured exclusively according to objective parameters of social impact, more or less in the way this can perhaps be done with education or health. Cultural creativity and cultural communication and exchange has another essential dimension, some would call it spiritual, others just immaterial, which plays in the realms of beauty, of emotions, of personal and collective identity. As a result, nor culture expressions nor the creativity behind them can be “implanted” in a country or in a society in the way foreign aid or foreign investment can build roads or hospitals. Any such approach to culture would just lead to some sort of neo colonialism, to the imposition of foreign cultures, which would certainly be in contradiction with basic European values.

179. However, cultural managers as well as creators, and anyone with some experience in this field, acknowledges that it is perfectly possible to preserve this very special nature of cultural creativity and expression without neglecting its **social and economic impact, including at a very local level**¹²⁹; and cultural and creative activities can be shaped, designed, and supported, taking into account that very dimension.

180. These pages have analyzed the **different weaknesses and needs of the cultural sector, both public and private** in Morocco and in Egypt. A cultural environment in which it is impressive to see in detail the huge, vital foreign contribution, and its fundamental role in the survival of most, if not all private activity in the cultural and creative sector. A contribution which comes from foreign public agencies, but also from foreign private donors involved in development aid, who are having a direct impact in cultural activities¹³⁰. Still, there is obviously a large space for external support.

181. External intervention and external financial support in the field of culture can be just short term (supporting activities, events), or can be the result of a long term and more structural perspective reaching cultural training, production, management, distribution, creation... And it can do that just from one of its specific angles: culture’s contribution to **social cohesion**; its role in **dialogue and better understanding** among people with different identities or values;

¹²⁹ See § 106 of this report.

¹³⁰ Besides well known names, such as the Ford Foundation or the Open Society, this report has come across the well targeted and well managed activity of less known organization very active in the field of culture and the arts, such as the Swiss Drosos Foundation (<http://www.drosos.org/en/node/313>)

its role as a vehicle to deliver socially constructive messages; or **considering culture as a tool for economic, social or local development**. Whatever the perspective it is essential not to forget the global, complex reality such an intervention is influencing in.

A few examples of such complexity have been described in these pages.

182. **Building libraries and media centres** in Morocco are a respectful goal, which could have a long term impact. Such facilities require important funding, and could become centres helping an easier access to culture in remote places in the country. But “investing” in public libraries will be useless if people don’t read; if there is not a long term effort to build a “book culture”, to increase the **audience**.

183. It will be extremely difficult to promote the role of culture as well as cultural actors in social cohesion and local development without the **complicity of local, regional and national authorities**. And this report can conclude that there is still a long way to go until this perception is understood by those who have the means to support it, or at least not to put obstacles to it. So **rising the awareness** on the importance of this issue by those who can change it becomes an essential goal of any long term policy. Previous pages, for example, have presented a description of the neglect in the making available of local public structures to young creators, performers, artists, and to what extent that limits or just makes impossible the development of potentially influential good initiatives. Civil servants behind those decisions do not appear to value what is being lost by an attitude which is purely passive at its best and obstructionist at its worst. Part of that would be changed if those who have a responsibility in the management of any premises with an impact in culture (including Youth Houses, for example) had a better training and understanding of good practices and successful models in cultural centres’ management, not only from Europe but also from other Mediterranean countries.

184. The **impact in sustainable development** can largely differ between different culture disciplines and creative industries. The impact of **arts & crafts** can be measured in relatively easy terms, for example. Any program which contributes to its professionalization, to the reinforcement of the chain of value starting with the work at a remote home and ending in a design shop in the capital or even abroad, would certainly be effective in this context. In other areas, an effort in favour of sustainability may come through professional training and through the long term building of different cultural management models. For example, there is general consensus among interviewed experts and professionals, including public officials, in that the current **festival system** in Morocco, an amazing succession of cultural events concentrated during a few months of the year, which concentrates a very important part of public and private cultural spending, is doing very little in favour of the stability of national cultural creation and production. So the long term goal should be to turn them from independent colourful, entertaining but somehow sterile fireworks, into windows of a cultural activity which is regularly developed before and after them.

185. Stimulating cultural and creative industries as vectors of sustainable development cannot be done without an active participation of the public authorities. But will never happen with the sole intervention of those public authorities. This report has described the **difficult balance between the public and the private sector** in the creative economy and the cultural management the two analyzed countries. As it has been explained, the situation is very different between them. But they both share an element of deep mistrust which creates an almost immediate rejection from both sides to the idea of joint partnerships at almost any level. In both cases, public structures dedicated to or related with education and training in the field of culture and the arts appear to be the only ones where such encounter between public and private could take place. In fact, there is the room for education of all the players involved in this issue, so that “Public” doesn’t mean necessarily “controlled by government, politically oriented, without any artistic freedom”; and “Private” can also include “socially responsible and financially accountable”. However, the large concept of **Public/Private Partnerships** for the development of the cultural sector does not need to be restricted to the idea of a sort of joint management of a single project. Such a Partnership can also be promoted, for example, through **new organizational models and practices** unknown in these countries and practically in the whole Region, such as arts councils¹³¹; or public cultural agencies respected by the private sector, professionally managed and subject to objective and transparent rules in public funding, which may include the structured advice of the private sector.

Technical assistance in its different forms can therefore play a role in supporting **basic institutional reforms and reinforcing capacity building** also in the public sphere, to improve **good governance** in the field of culture. As far as the regional level is concerned, political **coordination and inter-institutional cooperation** has a long way to go and will only happen if those who should be behind it assume the long term benefit of a strong culture and creative sector

186. The European Union has among its Member states **different models of public intervention in cultural management** and in support to creative industries. This refers not only to cultural management at a State level, but also on the way local authorities deal with cultural production and creative industries. And some of those models are now under scrutiny and rethinking, due to the current financial environment. But globally speaking, from a larger perspective, the essence of those models remains valid, and there is a huge experience to build upon. An intervention from the EU intended to have an impact in the midterm could take this reality into account, and could for example promote best practices exchanges and training addressed to public authorities (local, regional, national). **Good governance in the field of culture, coordination at the regional level, inter-institutional cooperation**, are all elements which could be strengthened through joint actions and

¹³¹ For a global approach on arts councils and a global list of them:
http://www.ifacca.org/vision_and_objectives/

programs involving simultaneously public officials or employees of the public sector from those countries and from EU Member states.

187. There are many **areas for a stronger EU support with a potential middle/long term impact** which can be deducted from the descriptions of needs along this report. To close this report, here are some examples:

- Assistance regarding **trustable and reliable statistics** for the measurement of cultural industries indicators, without which it is impossible to build up any serious cultural policy or to assess or forecast its impact¹³²;
- Support in the field of implementation, management and protection of **intellectual property rights**¹³³, essential to turn creativity into an instrument of development and economic growth. This is not necessarily about drafting new legislation, but mainly about best practices in management, regional coordination and exchanges, technical support (data bases, etc...);
- Assistance related to **good governance** in the field of public management of culture and public support to it, in areas such as fair and objective methods of allocation of public resources and subsidies; control of public funding in the hands of private organizations while respecting creative freedom and autonomy¹³⁴; new models on public-private models (such as arts councils)¹³⁵;
- Support related to preservation of **immaterial cultural heritage in a digital world**, including the possibility of new use for digitized heritage content (music, books, documents, photography...) ¹³⁶;
- **Awareness** rising among decision and opinion makers, and the public in general, on the **real social contribution and value of culture and creative industries** ¹³⁷;
- In particular, awareness rising in the field of **preservation and respect of cultural heritage** among the public in general, and in particular regarding the local communities who may better protect it and who could eventually develop tourism and other activities in relation to it ¹³⁸;
- **Customs and police** awareness and training in the field of cultural heritage protection;
- Training in the field of **management of cultural equipments, including programming** (training of trainers) ¹³⁹;
- Training of **journalists and media editors**, on- and off line, in different aspects related to culture and the cultural industries: culture reviews (critics' training), positive social impact of culture; best practices and foreign examples on cultural information¹⁴⁰;

¹³² See §§ 5-8 of this Report. The following quotes include the paragraph's footnotes, when applicable.

¹³³ See §§ 23, 131-136

¹³⁴ See §§ 16, 28, 29, 31, 46, 103

¹³⁵ See § 185

¹³⁶ See § 151

¹³⁷ See § 26, 92, 183

¹³⁸ See § 106

¹³⁹ See §§ 47, 62, 64, 75, 124,

- Support on **audience development**¹⁴¹ adapted to the reality of different cultural disciplines and cultural industries related to them.
- Coordination with programs in the field of support to education, with the shared goal of raising awareness on the importance of culture and creativity¹⁴² among **teachers active in the basic school system**, and to discover/promote creative talent (in different disciplines) among children and youth;
- Coordination with programs in the field of support to education, with the shared goal of strengthening a **book/literary/narrative** related culture¹⁴³;
- Coordination with EU related programs and **financial instruments related to Micro, Small and Medium Size enterprises (SMEs)** in the Mediterranean, with the shared goal of specifically addressing the particular needs and capacities of those active and with potential in the field of culture and creative industries¹⁴⁴;
- Support to the **foreign visibility and international projection** of cultural and creative activities and projects¹⁴⁵, including: web presentations (in languages different from Arabic)¹⁴⁶ and other communications instruments; online sales and distribution¹⁴⁷; participation in international networks of artists, producers or creators; professional networking with foreign festivals and other organizations related to international cultural projection, promotion and, when applicable, export¹⁴⁸;
- Support and **capacity building** addressed to civil society (“private”) organizations active in the field of culture and creative industries, in particular by promoting the existence of federations or “associations of associations” as means to of stimulating structured collaboration and capacity sharing among small and weak organizations¹⁴⁹;

¹⁴⁰ See §§ 125, 126

¹⁴¹ The European Commission has already put Audience development at the very center of its new cultural policy, as it is proven by the text of the Creative Europe Program, or by the organization in October 2012 of the important event called “European Audiences: 2020 and beyond” http://ec.europa.eu/culture/news/20120711-audiences_en.htm. There is no reason not to apply very similar principles and ideas in the cultural activity of the EC in third countries.

¹⁴² See § 126

¹⁴³ See § 169

¹⁴⁴ As it has been partially described in this report, and is well explained in the bibliography quoted in it, creative economy is based on the action of a mix of players, with different importance depending on the cultural discipline is examined: public players, private non-profit structures, and private companies competing in the market. These companies are indeed micro or small enterprises according to general EU standards; and should receive specific attendance (or at least not be neglected) in the EU efforts in this field. See for example <http://www.eib.europa.eu/about/press/2012/2012-034-10eme-conference-femip-les-pme-mediterraneennes-a-la-conquete-de-nouveaux-horizons.htm?lang=en>

¹⁴⁵ See § 141

¹⁴⁶ See § 127

¹⁴⁷ See § 145

¹⁴⁸ See §§ 171-176

¹⁴⁹ See §§ 102-111