BASELINE STUDY ON LAO CULTURAL INDUSTRIES 2012

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Why this study in Lao PDR?

Cultural industries are a major actor of socio-economic development.
Tools for preserving, stimulating and promoting cultural diversity.

There is limited knowledge of the cultural industries in Lao PDR

- Understand and define the concept of cultural industries
- Identify its strengths, weaknesses.
- Identify the roles and linkages of all stakeholders.
- Identify needs and expectation of the sector.
Why this study in Lao PDR?

Methodology employed

- External quantitative Data: creating database
- Qualitative and quantitative field research: questionnaires and interviews
General presentation

What are cultural industries

- Businesses and organisation which include creation, production, dissemination and commercialisation of cultural goods.
- Can be material or immaterial
- Generally related to IPR
The cultural industries cycle:

- **Creation**
  - Investment, exploration and conception of the content

- **Production**
  - Realization (materialization) of cultural expressions

- **Dissemination**
  - Bring cultural expressions to the public

- **Reception**
  - Audience-oriented activities that facilitate understanding of a cultural work

Source
- Artist

Realisation
- Producer / Diffuser

Demand
- Audience
Cultural industries in Lao PDR

Legal framework

- International integration
- Many stakeholder involved
- Long elaboration process
- Issues with dissemination, implementation and enforcement
- More and more laws in Lao PDR
- Development of IPR
Cultural industries in Lao PDR

Educational framework

Lao PDR lack of identified education instrument whether or not they directly linked to artistic practice or awareness or more general Entrepreneurial skills.

Primary and secondary general Curriculum
University
Vocational training
Technical and artistic Workshop
Cultural industries in Lao PDR

Snapshot

Entrepreneurial general profile

- Cultural industries are dominated by young actors.
- Foreigners play a key role in the emergence of the sector.
- Highly educated and motivated workforce.
- Information and knowledge comes mostly from informal channels.
- Newness of the sector.
- High financial, legal, technical and human resources challenges.
Cultural industries in Lao PDR

Snapshot

**Economy of the enterprise & domain of activity**

- Mostly a domestic market
- A majority of SME and SOHO
- Increasing revenues
- Low support from Lao public sector
- Self-financed
- Main customers are lao individuals
- Main sources of income: products and sale services
- Lowest source of income: royalties
Cultural industries in Lao PDR

Snapshot

Exchange, Information & Communication Technologies

- Friends, professional network and press are main sources of info.
- Low impact and contribution from TV and Radio
- Recent and under construction general structure of the businesses (almost no marketing, communication or IT department/agent)
- Few brochures and WebPages – active on Facebook and business card
- Major role of press, Internet and international exchanges as sources of knowledge and inspiration
Cultural industries in Lao PDR

Snapshot

National regulations & IPR – perceptions from private sector

- Low awareness of Lao PDR legal framework
- Difficulties in understanding and interpreting existing laws.
- When understood, regulations are seen insufficient or unadapted
- Request for more public support
- Taxes
- Setting business process is long, potentially expensive and unclear
- Lack of awareness about IPR
- Many laws are not implemented yet (decree on hold)
Cultural industries in Lao PDR

Snapshot

Needs and expectations

- Funding and qualified human resources
- Audience awareness
- Brainstorming, networking, professionals exchange and meeting
- More dedicated venues
- Censorship: clearer rules on what is allowed and what is not allowed
- Improve technical capacities
- Improve protection of the creator (IPR enforcement)
- More focus on quality products by increasing number of trainings and curriculums.
Performing arts (the example of music)

- Many artists (not many creators)
- Great influence from TV, Radio and internet, as well from neighboring countries.
- Many productions (although diversity is limited)
- Strict control on the dissemination
- Lack of technical and human resources (few producers, retailers)
- Difficult production of CD/VCD/DVD
- Expansion and leading role of Music Video
- Limited way of dissemination/distribution
- Low income generated.
- Limited dedicated venues
- Audience: mostly Youth and wealthy people (unless there are free concerts)
Cultural industries in Lao PDR

Overview of by sector

**Cinema**

- Great demand
- Quality products (though small number of productions)
- Very confidential sector
- Very few professional opportunities
- Lack of human and technical resources
- Lack of funding
- Lack of venues and dissemination opportunities
- Close control/inspection from the public sector
- Very low income generated
- Suffers from proximity of Thai language productions
Cultural industries in Lao PDR

Overview of by sector

Visual arts: photography & fine arts

- Artists are numerous, talented and very good technicians
- Largely under-estimated art form
- Recently boost by the high demand in marketing and advertising
- Lack of raw material and technical tools
- Lack of pre and post production relay
- Few galleries, agent, curator.
- Few market opportunities
Cultural industries in Lao PDR Overview of by sector

Handicraft

- One of the identified key sectors for development
- Diversity of techniques, high quality of traditional skills
- Very well structured sector from national to village levels. Very well connected to other sectors (notably tourism). Benefit from governmental and international organisations’ help.
- Risk of becoming folkloric and touristy attraction only
- Very familial and local production, models do not evolve much.
- Difficulties to reach international quality standards for design and finishing: limited access to international markets
- Suffers from unfair competition from neighboring countries.
Cultural industries in Lao PDR
Overview of by sector

Books & Printing

- Few writers
- Few Lao books
- Few opportunities to foster inspiration
- Limited subjects
- Large number of publishers
- High cost of printing process
- Substantial amount of libraries
- Development of press is strengthening both the writing and reading behaviors.
- Low interest from readers: most promotional campaigns (from public and private sectors) target mostly children
Cultural industries in Lao PDR

Overview of by sector

Media

- Large broadcasting capacity (Both private and public sector are represented)
- Increasing gap between public and private media delivering capacity (programme quality, capacity to target audience and innovate)
- Copyrights issues
- Few quality programmes → low interest from audience → low appeal for advertising → low income generation
- Position themselves as service providers rather than a source of information and knowledge
- Suffering very much from the influence and competition of Thai media
- Attractiveness of Lao media could be improved by enlarging the boundaries, being more daring, and promoting more contemporary creations
Cultural industries in Lao PDR

Overview of by sector

Press

- Very dynamic sector
- The best vector for companies to advertise and have visibility
- Quite specialised
- Stimulate the printing industry
- Distribution issues

Media are a very important socio economic tool due to their strong influences on building fashions and opinions. They should therefore be more included in the creative industries development.
### Cultural industries in Lao PDR

#### Findings

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<tr>
<th>Strengths</th>
<th>Weaknesses</th>
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<tr>
<td>• Great ethnic variety, diversity of sources of influences</td>
<td>• Lack and complexity of legal frameworks</td>
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<td>• Pool of young and dynamic entrepreneurs</td>
<td>• Few education programmes and trainings</td>
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<td>• Loosened restrictions on private business</td>
<td>• Financial benefits have priority over artistic component = poor diversity</td>
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<td>• Strong key persons in each sector.</td>
<td>• Limited resources and absence of tax and financial incentive system</td>
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<td></td>
<td>• Generational and cultural gap between public and private sectors</td>
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<td>• Limited access to technical materials</td>
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<table>
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<tr>
<th>Opportunities</th>
<th>Threats</th>
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<td>• Dynamic general national economic growth</td>
<td>• High competition from high quality productions and human resources from abroad.</td>
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<td>• Great expansion of cultural goods and services consumption</td>
<td>• Difficult dissemination of cultural goods = limited visibility</td>
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<td>• Increased demand</td>
<td>• Difficulties to reach international standards of quality.</td>
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<td>• Better international integration</td>
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<td>• Great Internet development = better exposure and communication.</td>
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<tr>
<td>• Growing global international interest for Lao products and cultures</td>
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Thank you for your attention