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The Economics of Absence: East Pakistan, Structural Decline, and the Myth of Islamisation in Pakistani Cinema
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ABSTRACT

The received wisdom in Pakistani film criticism and in much of the scholarly literature holds General Muhammad Zia ul-Haq's Islamization policies responsible for the near-death of the country's cinema from the 1980s onward. This article challenges that consensus on empirical, legal and comparative grounds. Drawing on Mushtaq Gazdar's foundational filmography, primary legislative texts the Cinematograph Act of 1918 and the Motion Pictures Ordinance of 1979 comparative evidence from post-revolutionary Iranian cinema, production statistics, interviews with practitioners, and the author's own filmmaking experience documented in The Friday Times, the article argues that the structural cause of Pakistani cinema's collapse was the loss of the East Pakistan market in 1971, which halved box-office revenue overnight and left producers too financially constrained to experiment with new stories, new actors, or new technology. Compounding this was the illegal conversion of cinema-house land to commercial plazas, the failure of directors to transmit craft to a younger generation, and the distorting influence of television conglomerates on post-2010 production. The so-called revival after 2010 is shown to be partial, fragile, and commercially overstated. The article concludes by reading The Legend of Maula Jutt (2022) not as a rupture but as a vindication of the very commercial logic class-based, melodramatic, rooted in Punjabi sensibility that the industry abandoned in the 1980s when it could no longer afford the risk of innovation.

Keywords: Pakistani Cinema, East Pakistan 1971, Zia Ul-Haq, Islamisation, Film Economics, Lollywood, Punjabi Cinema, Motion Pictures Ordinance 1979, The Legend of Maula Jutt, Cinema Houses

I. Introduction

Cinema in Pakistan died, so the dominant narrative runs, because General Zia ul-Haq killed it. From the 1980s onward, this explanation has structured almost every journalistic account of Lollywood's decline and a substantial portion of the academic literature. The editors of *Cinema and Society: Film and Social Change in Pakistan* (Khan & Ahmad, 2016) frame Pakistani cinema primarily within the ideological and political transformations of the state. Vazira Zamindar and Asad Ali's anthology *Love, War, and Other Longings: Essays on Cinema in Pakistan* (Zamindar & Ali, 2020) probes these questions with admirable nuance, yet even its most historically attentive contributions revolve around the axis of ideology, censorship, and political repression. Ali Nobil

Ahmad's work on cinephilia in Pakistan (Ahmad, 2014) attributes the 'steady disappearance' of cinema halls partly to Islamist vandalism. The sociologist's reflex to seek political and ideological explanations for cultural phenomena is understandable, but it can obscure the more prosaic engines of industrial collapse.

This article advances a different argument: that the structural origins of Pakistani cinema's decline predate Zia and lie in the economics of film production and distribution after the secession of East Pakistan in 1971. Everything that followed including the Motion Pictures Ordinance of 1979, the rise of the VCR, the land-grab of cinema houses, and the dependency on television conglomerates operated within the limits set by that prior financial wound. To diagnose the disease correctly is not merely an academic exercise. Pakistan is a country that today has fewer than two hundred cinema screens for a population exceeding two hundred and fifty million. Without understanding why, the industry collapsed as it did, no serious plan for its revival is possible.

The argument unfolds in six stages. Section II reconstructs the economic geography of Pakistani cinema up to 1971 to show how large the East Pakistan market was. Section III examines what was actually lost in 1971 not only revenue, but talent, creative diversity, and production infrastructure. Section IV evaluates the Motion Pictures Ordinance of 1979 against the Cinematograph Act of 1918 that it largely reproduced, arguing that the much-cited 'glory of Islam' clause did not in practice prevent the making of commercially successful films. Section V examines the fate of cinema-house infrastructure. Section VI considers the so-called post-2010 revival and finds it considerably less robust than its celebrants claim. A concluding section reads *The Legend of Maula Jutt* (2022) as evidence that the commercial logic Pakistani cinema abandoned in the 1980s remained viable all along.

II. The Geography of Pakistani Cinema Before 1971

To understand the significance of 1971, one must first appreciate how deeply the East Pakistan market was embedded in the architecture of the Pakistani film industry. As Mushtaq Gazdar documents in *Pakistan Cinema 1947–1997* (Gazdar, 1997/2019) still the indispensable historical record of the industry Pakistani cinema in its golden era produced between 60 and 124 feature films annually, with output peaking in 1970. The industry operated across two geographically separate but commercially integrated wings of a single nation-state. Asif Noorani, writing in *Dawn* in 2016, provides the clearest statistical statement of this integration: 'In 1971 there were 400 cinemas in all of Pakistan and a quarter of them existed in East Pakistan. In 1970, 114 films had been produced in the eastern wing of the country alone, including three in Urdu' (Noorani, 2016).

These numbers carry enormous implications. A quarter of the country's cinema halls and a substantial share of its production were located in the eastern wing. But the eastern wing's contribution to the integrated market was not merely quantitative. East Pakistani Urdu films a genre that began with *Chanda* (1962) and ran until *Jalte Suraj ke Neeche* (1971) brought a qualitatively distinct aesthetic to the common market. The Bengali folk-influenced music of composers like Robin Ghosh and Khan Ataur Rehman; the naturalistic acting of Shabnam and Rahman; the softer, more intimate storytelling sensibility that Noorani (2016) identifies as 'Bengal ka jadoo' these elements refreshed the West Pakistani aesthetic and expanded its commercial appeal. Forty-seven Urdu films were produced in East Pakistan between 1962 and 1971, all distributed across the western wing. The success of films like *Talash* (1963), which ran for fifty consecutive weeks a golden jubilee and *Chakori* (1967) demonstrates that this cross-wing exchange was commercially substantial, not marginal.

The exchange also had a production-cost dimension. As Noorani (2016) records, male stars from East Pakistan—notably the early Nadeem—commanded a fraction of what Waheed Murad or Mohammad Ali would charge. This cost arbitrage allowed West Pakistani producers to generate content at lower margins, which in turn supported a higher volume of output. When East Pakistan was lost, this entire subsidy disappeared overnight.

Similarly, a large pool of technician's editors, cameramen, sound-recordists and other production resource were lost with East Pakistan. This left the Lahore-based film industry handicapped in many ways.

III. What 1971 Destroyed: Revenue, Talent, and the Courage to Experiment

The separation of East Pakistan in December 1971 did not merely reduce the market. It restructured the entire economic calculus of Pakistani filmmaking in ways from which the industry has never fully recovered. The loss was threefold: revenue, talent, and the confidence to take creative risks.

On revenue, the arithmetic is unsparing. If a quarter of the cinema halls were in East Pakistan, and if the producer's share of box office was approximately one-third (the distribution arithmetic that still prevails: roughly 35% to the producer, 65% divided between distributor and exhibitor), then the loss of the eastern wing effectively removed somewhere between 20% and 25% of the addressable revenue base for any given Urdu film. For a commercial cinema operating on thin margins in which a film budgeted at thirty million rupees required ninety million at the box office merely to break even for the producer this revenue contraction was existential. The author has argued in *The Friday Times* (Zafar, 2023a) that the VCR, which Pakistani producers blamed for the industry's troubles in the 1980s, was in reality a scapegoat adopted to avoid acknowledging the damage done by 1971: 'the loss of the East Pakistan market in 1971 had halved box office revenue, and had left Pakistani film producers struggling and too timid to try new actors, new stories, new technologies and any novel ways of doing things at all.' Gazdar's (1997/2019) own account confirms this: after 1971, producers retreated to formula.

On talent, the losses were irreversible. Zahir Raihan, one of the most gifted directors of united Pakistan, disappeared in Mirpur in January 1972 while searching for his missing brother. With him was lost a filmmaker of genuine artistic ambition the director of the critically acclaimed *Jibon Theke Neya* (1970), praised by Satyajit Ray, and of multiple commercially successful Urdu films that had demonstrated that quality and box-office appeal were not incompatible in the Pakistani context. Composers Moslehuddin and Robin Ghosh, singer Ferdausi Begum, and dozens of other practitioners either returned to Bangladesh or dispersed abroad. Producer Anis Dossani pioneer of East Pakistan's Urdu film production lamented for the rest of his career the loss of the infrastructure he had built in Dhaka. Director Nazrul Islam, who eventually settled in Lahore, was one of the few eastern figures who successfully relocated and continued to produce commercially significant work, including *Aina* (1977), which ran for eight consecutive years in Pakistani cinemas.

On creative experimentation, the impact is harder to quantify but no less real. Pakistani cinema had, in the decade before 1971, demonstrated a capacity for aesthetic range: neo-realist Bengali subjects in *Jago Hua Savera* (1959), lyrical melodrama in *Armaan* (1966), historical epic, social comedy, and intimate romance coexisted in a single market. The post-1971 producer, working with reduced revenue and absent the creative stimulus of the eastern wing, retreated to the safest available formula. That formula was Punjabi rural melodrama. As the author noted in his manuscript (Zafar, forthcoming), when *Wehshi Jutt* (1975) performed well at the box office, 'it made the producers feel confident about Punjabi films, and about the rustic looking Punjabi man,

Sultan Rahi, as a successful actor.' The risk-averse logic is commercially rational: Rahi's proven formula required no experimentation, no new faces, no investment in unfamiliar genres. The same lead actor, the same narrative arc the dispossessed man of the land avenging injustice against a feudal oppressor could be reproduced with minimal investment and predictable returns. It was stagnation disguised as stability.

IV. The Motion Pictures Ordinance of 1979 and the Myth of Islamisation

The prevailing account of Pakistani cinema's decline assigns a determining role to General Zia ul-Haq's Islamisation programme, of which the Motion Pictures Ordinance of 1979 is the primary legal exhibit. A close reading of that Ordinance against the Cinematograph Act of 1918 that it replaced and against the actual production record of the 1980s substantially undermines this claim.

The Cinematograph Act of 1918 was a piece of British colonial legislation designed primarily to regulate the safety of exhibition venues and to create a licensing framework for public screenings. Its censorship provisions, contained in Section 7, empowered state authorities to suspend exhibition of any film 'likely to cause a breach of the peace.' The Motion Pictures Ordinance of 1979 retained this infrastructure almost entirely, adding one significant clause. Section 6(1) of the Ordinance provides that 'A film shall not be certified for public exhibition if, in the opinion of the Board, the film or any part thereof is prejudicial to the glory of Islam or the integrity, security or defence of Pakistan or any part thereof, friendly relations with foreign States, public order, decency or morality or amounts to the commission of, or incitement to, an offence.'

Two observations are warranted. First, the Ordinance is a modified version of the 1918 Act as the full text of both documents makes clear with the addition of two specific Islamic and national-security provisions. It did not, as is sometimes claimed, constitute a radical reinvention of the regulatory environment for cinema. Second, and more importantly, the 'glory of Islam' clause did not in practice prevent the production of commercially successful films. The dance sequences in Sultan Rahi's *Maula Jutt* (1979) and *Sher Khan* (1982), featuring female performers in revealing costumes, proceeded without any documented interference from the censorship board. As the author observed in his manuscript (Zafar, forthcoming): 'There was no bar on dress code for films... nor did the local administration seem to have bothered sex and obscenity as the ads for porn movies exhibited in Naz and Moonlight cinemas of Lahore were published in the newspapers.' If the Islamisation of the regulatory environment had been the decisive factor in the industry's decline, one would expect to find a correlation between censorship activity and production collapse. The statistical record does not support this. Production declined across the board—Urdu films, Punjabi films, female-oriented films alike in a pattern consistent with a structural market contraction rather than censorship-driven creative suppression.

The Iranian comparison is instructive here. Rahbaran (2016), in *Iranian Cinema Uncensored*, documents that after the 1979 Islamic Revolution, Iranian cinema faced censorship conditions far more severe than anything applied in Pakistan mandatory hijab in all scenes, prohibition of physical contact between unrelated men and women, script pre-approval, dense networks of ideological restriction. Yet Iranian cinema emerged from those conditions to produce internationally acclaimed work of the first order, winning Academy Awards (*A Separation*, 2012) and major prizes at Cannes, Venice, and Berlin. Zeydabadi-Nejad (2009), in *The Politics of Iranian Cinema*, shows how this apparent paradox resolved itself: filmmakers found in constraint a creative discipline, using allegory, symbolism, and formal ingenuity to speak across and around the restrictions. The question this raises for Pakistani cinema is pointed: if comparable indeed,

more severe Islamic censorship produced internationally celebrated cinema in Iran, why did the rather modest additions of the 1979 Ordinance produce stagnation in Pakistan? The answer, this article contends, is that the Ordinance was largely irrelevant. Pakistan's cinema did not decline because filmmakers could not make good films within the regulatory environment; it declined because the revenue base, damaged by 1971, made it financially rational for producers to avoid the risks that good films require.

A further empirical consideration reinforces this argument. The academic literature on censorship in Pakistani cinema most notably the doctoral research reviewed in 'The Censorship of Visual Pleasure in Pakistani Films' (Asian Indexing, 2023) finds that 'the review of Pakistani literature comprising the statistical data of films does not prove the authenticity of a general perception that General Muhammad Zia-ul-Haq's martial law regime and forced Islamization caused the decline of Pakistani cinema.' This finding, which supports the argument advanced here, has been insufficiently integrated into the mainstream scholarly conversation, which continues to foreground ideological explanations.

V. The Infrastructure of Absence: Cinema Houses and Their Conversion

Any account of Pakistani cinema's decline must confront the physical destruction of its exhibition infrastructure. Pakistan once had over 450 cinema houses; it now has fewer than 150 screens, almost all concentrated in the multiplexes of a handful of urban centres. The story of this contraction is simultaneously one of market failure and of systematic illegality.

The conversion of cinema-house plots to commercial plazas has occurred across every major city. In Peshawar alone, a city that once supported fifteen cinema halls, seven of the oldest venues Shabistan, Palwasha, Capital, Falak Sair, Novelty, Metro, and Ishrat have been demolished and replaced with commercial centres and hotels. In 2025, three further Peshawar cinemas were razed: Naz Cinema, a ninety-year-old pre-partition venue built by a Sikh businessman; Picture House, established in 1931; and Arshad Cinema. In Rawalpindi, Nawalti and Taj Mahal cinemas were demolished and replaced with commercial markets; the Naz cinema on Murree Road was converted to a shopping complex. In Faisalabad, according to the Pakistan Bureau of Statistics, the division had twenty-eight cinemas in 2003–04; by 2011–12 this had fallen to seven, with demolished sites converted to residential colonies and commercial plazas. In Sialkot, nine cinema halls were demolished in the space of a few years, with shopping plazas constructed on the vacated land.

The legal architecture governing cinema-house plots is not ambiguous. Under the licensing provisions of both the Cinematograph Act and the Motion Pictures Ordinance, provincial governments issue licences for specific premises for the specific purpose of film exhibition. The conversion of such premises to commercial use without revocation of the cinema licence and proper rezoning constitutes a violation of the original regulatory grant. That such violations occurred at scale, with no apparent enforcement, reflects the same institutional indifference that allowed the land allocations themselves to be treated as personal assets by their owners once the cinema business became unprofitable. As the author argued in his manuscript (Zafar, forthcoming): the absence of film business rather than Islamist violence explains why these properties were never rebuilt. Shops burnt in the same riots were restored; cinemas were not, because nobody expected the film business to recover sufficiently to justify the reconstruction cost.

This destruction of exhibition infrastructure has become self-reinforcing. Pakistan's screen density at fewer than one screen per million population is among the lowest in the world and acts as a structural ceiling on the commercial viability of local production. A film that might

recoup its investment in a market with four thousand screens (as in India) cannot do so in one with fewer than two hundred. The economic case for large-budget local production remains precarious as a direct consequence.

VI. The Training Deficit: A Generation Without Masters

One dimension of Pakistani cinema's structural weakness that has been almost entirely absent from the scholarly literature is the collapse of the apprenticeship system through which cinematic craft was historically transmitted. In any mature film industry, the knowledge embedded in experienced directors, cinematographers, editors, and sound technicians' passes to the next generation through formal mentorship on set. In Pakistani cinema, this transmission largely failed to occur.

The reasons are partly economic and partly circumstantial. As the industry contracted from the 1980s onward, experienced directors had fewer productions in which to involve younger collaborators. The business was not attractive enough to retain talented people who had alternative livelihoods in television, advertising, or abroad. Directors of the Lollywood golden era Syed Noor, Hassan Askari among them were not building studios with junior directors in the way that the Hollywood studio system or Bollywood's production houses did. When Sultan Rahi died in 1996 and Punjabi cinema began to collapse, the generation that might have taken it forward had not been formed.

The author's first-hand experience of filmmaking in Lahore between 2018 and 2022, documented in his book manuscript (Zafar, forthcoming), provides granular evidence of this skills deficit. A cinematographer trained in television commercial production who could not adapt his lighting technique to the Arri Alexa camera; editors experienced in TVC work who could not sustain the sustained aesthetic engagement that narrative filmmaking demands; actors whose training if any was in the fifteen-scene-per-day rhythm of television drama rather than the two-to-three screenplay pages per day that feature filmmaking requires. Director Sabiha Sumar, interviewed in *Film and Cinephilia in Pakistan* (Ahmad & Khan, 2021), had to bring technicians from Germany and France for *Khamosh Pani* (2003) because, as she reported, local crew were 'at such a basic level that we can't work and train at the same time.' This is not simply a story of individual inadequacy. It is a systemic consequence of an industry that contracted so rapidly that institutional knowledge was not transmitted.

The training deficit interacts with a talent-retention problem specific to the post-2010 period. The author's experience of auditioning actors in Lahore revealed that most aspiring performers had entered the industry as models whose objective was to increase their modelling fee rate rather than to develop as actors. 'Modelling brought them instant money with little effort,' he has written (Zafar, forthcoming), 'while acting demanded hard work rehearsals and learning and that too with little money, as the newcomers.' The incentive structure of the post-television-boom entertainment economy actively discouraged the kind of patient craft development that feature filmmaking demands. This structural problem is not addressed by the policy prescriptions multiplex investment, co-production treaties, festival strategies that dominate official discussions of cinema revival.

VII. The Post-2010 'Revival': Partial, Fragile, and Overstated

The release of Shoab Mansoor's *Khuda Kay Liye* in 2007, backed by Geo TV, inaugurated what critics and journalists have characterised as a 'revival' of Pakistani cinema. The author wrote in *The Friday Times* (Zafar, 2023a): 'Between 1980 and 2010, Pakistani cinema stagnated in a world that was rapidly losing relevance... When it eventually re-emerged with a new digital look after

2010, it largely emulated subpar imitations of Bollywood.' This assessment is borne out by a closer examination of the post-2010 production record.

The revival was structurally dependent on conditions that do not constitute a sustainable film industry. The most commercially successful post-2010 productions *Punjab Nahi Jaungi* (2017), *Na Maloom Afraad* (2014), *Jawani Phir Nahi Ani* (2015), and their sequels were backed not by independent film producers but by television channels and advertising conglomerates: ARY Digital, Geo Films, HUM Films. This dependency created a distinctive industrial logic. Channel-backed films could access established actors from the channel's drama roster, post-production facilities, and marketing infrastructure. They were, in effect, expensive television productions that happened to be shown in cinemas first. The author observed in his manuscript (Zafar, forthcoming) that 'three main television channels that control the entertainment screens in Pakistan: ARY Digital, Geo TV, and HUM TV' have become the effective gatekeepers of Pakistani cinema. The implications are significant: films greenlit by these organisations tend toward the narratives and aesthetics of successful television drama rather than toward the cinematic experimentation that might develop the medium.

The Karachi-Lahore divide that structures post-2010 production compounds this problem. Karachi-based productions, backed by television conglomerates with permanent relationships with actors and crew, can achieve a level of operational efficiency unavailable to independent Lahore-based producers. But as the author's manuscript records (Zafar, forthcoming), Lahore-based filmmakers among them Nasir Adeeab, Khalil ur-Rehman Qamar, and Syed Noor, all interviewed for this research believe that commercially durable Pakistani cinema will ultimately come from Lahore. Their reasoning is cultural: Lahore-based films address the social reality of the majority Punjabi-speaking population in the language and aesthetic register of their lived experience. Channel-backed Karachi productions, however competently made, are oriented toward an urban, Urdu-speaking, television-habituated audience whose preferences do not map onto the national majority.

The so-called 'new wave' represented by films like *Zinda Bhaag* (2013), *Dukhtar* (2014), *Moor* (2015), and *Cake* (2018) constitutes a genuine artistic achievement, but it has not established a sustainable commercial model. These films typically recoup their costs through international distribution, festival success, and streaming rights rather than through domestic theatrical revenue. When Sarmad Khoosat funded *Zindagi Tamasha* (2019/2023) by selling personal property, he was demonstrating in one act both the artistic possibility of Pakistani cinema and the commercial impossibility of making art cinema within the existing industrial structure. As Khoosat told the author in an interview conducted in August 2023 (Khoosat, as cited in Zafar, 2023c): 'I wasn't going to pitch it to financiers... I decided to take full responsibility for financing it.' The film attracted 307,000 YouTube views in its first sixteen hours of online availability, suggesting an audience hungry for the kind of cinema it represented. But an audience on YouTube does not generate the theatrical revenue that sustains an industry.

The inflation crisis of 2022–23, which the author examined in *The Friday Times* (Zafar, 2023d), delivered the structural fragility of the post-2010 revival into sharp relief. With production costs between \$3 and \$5 million at current exchange rates, the margin of viability for independent producers has essentially closed. The Eid ul-Adha 2023 release *Teri Meri Kahaniyaan* in which three directors pooled resources to share costs illustrated the precariousness eloquently. Director Nadeem Baig's frank admission that the collaboration was driven by inflationary pressure, not creative vision (Baig, as cited in Zafar, 2023a), is a precise index of the industry's condition.

VIII. The Legend of Maula Jutt (2022): Vindication, Not Rupture

Bilal Lashari's *The Legend of Maula Jutt* (2022) changed the terms of the conversation about Pakistani cinema with a finality that no scholarly intervention had managed to achieve. The film a high-budget remake of Yunus Malik's 1979 Punjabi classic *Maula Jutt* became the highest-grossing Pakistani film of all time, collecting PKR 800 million domestically and PKR 1.2 billion overseas, for a total of over PKR 2 billion worldwide. It outgrossed the previous Pakistani record-holder by a factor of three, became the second-highest-earning South Asian film in the United Kingdom in 2022, and was reported as the most-watched South Asian film in Norway. Its domestic opening weekend of PKR 113 million set a new Pakistani record.

For the purposes of this argument, what matters about *The Legend of Maula Jutt* is not its commercial record alone but what that record reveals about the relationship between Pakistani cinema and its audience. The film is, in the most fundamental sense, a continuation of the Punjabi commercial tradition that critics have most consistently dismissed: the *gandasa*, the rural setting, the confrontation between an outlaw hero and a cruel antagonist, the melodramatic stakes of honour, family, and retribution. If Islamisation, as the conventional account holds, had destroyed the cultural environment in which this tradition flourished, *The Legend of Maula Jutt* should have found no audience. Instead, it found every audience urban and rural, diaspora and domestic, critical and popular simultaneously. As the author observed in his manuscript (Zafar, forthcoming): 'It has hushed those who claimed Pakistani films can't do business, silenced those who moaned about the dying cinema culture in Pakistan.'

The film's success is best understood not as a rupture but as a vindication. It demonstrates that the commercial logic embedded in the Punjabi film tradition class-based melodrama in which a man of the people confronts the violent power of a feudal lord retains its grip on Pakistani audiences across half a century of social transformation. What *Wehshi Jutt* (1975) demonstrated on a modest budget with Sultan Rahi, *The Legend of Maula Jutt* demonstrated on a large budget with Fawad Khan, Mahira Khan, Hamza Ali Abbasi, and Humaima Malick. The change is one of production value and technical sophistication, not of structural logic.

The film also illuminates the class dynamics of Pakistani cinema that the author identifies as its defining characteristic. The confrontation between Maula Jutt and Noori Natt is a confrontation between two forms of masculine power: one rooted in the dispossessed masses, one in the inherited violence of a dominant clan. That this confrontation enacted through the *gandasa* that elitist critics have long derided can generate two billion rupees at the global box office suggests that the elitist framework through which Pakistani cinema has been studied is itself a structural problem. A cinema assessed by critics who find its primary genre embarrassing will never be understood on its own terms.

IX. Conclusion: Toward a Correct Diagnosis

This article has argued that the decline of Pakistani cinema is primarily an economic story rather than a political or ideological one. The loss of the East Pakistan market in 1971 was the originating event. It reduced the revenue base, extinguished the creative stimulus of the cross-wing exchange, and destroyed the financial confidence of producers precisely when that confidence was most needed. Everything that followed the retreat to formula, the failure to transmit craft, the conversion of cinema halls to plazas, the dependency on television conglomerates operated within the limits set by that prior structural contraction. The Motion Pictures Ordinance of 1979 added modestly to the regulatory burden but did not create the conditions of impossibility that the dominant narrative assigns to it. Iranian cinema, operating under far stricter Islamic

ensorship, flourished internationally, demonstrating that censorship alone cannot explain stagnation.

The so-called revival of the post-2010 period has been real but partial. It has produced some films of genuine artistic merit *Khuda Kay Liye, Bol, Zinda Bhaag, Zindagi Tamasha, Joyland* and has demonstrated that Pakistani audiences will respond to ambitious filmmaking when they encounter it. But it has not established the self-sustaining industrial infrastructure trained personnel, viable exhibition networks, an independent production finance ecosystem without which any revival remains precarious. The dependence on television conglomerates as the primary source of production finance is a structural constraint that shapes content toward television norms and away from distinctively cinematic ambition.

The Legend of Maula Jutt offers a more ambiguous lesson than its champions often acknowledge. It demonstrates that the Punjabi commercial tradition is commercially viable at high production values but it was produced by a director trained abroad and financed through mechanisms unavailable to most Pakistani producers. It is not yet replicable at scale.

What is needed is what has never been provided: a sustained, systemic account of the industry's economics that connects the loss of 1971 to the stagnation of the 1980s, the infrastructure collapse of the 1990s, and the fragile experimentation of the 2000s and 2010s. Film criticism in Pakistan has too often reached for the ideological explanation when the economic one was staring it in the face. The industry's problems are material before they are cultural, structural before they are ideological. Addressing them requires confronting those material realities screen density, production finance, technical training, exhibition infrastructure with the same analytical seriousness that has been lavished on the question of censorship and Islamisation. The correct diagnosis is not the comfortable one; but without it, the patient cannot be treated.

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